

Children's Centre Management Information System: CCM

Portfolio of Information Documents

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1. CCM Portfolio of Information Documents Introduction

The Children's Centre Management Information System; CCM, is used by Children's Centres in Barnet to record information about families, children and carers.

This portfolio of documents is split into three sections:

Part One – CCM Framework

The CCM Framework sets out the framework that the Children's Centres and Barnet Children's Service will work towards to ensure the effective operation of data collection and data management for Children's Centres.

Part Two – Data Guidance

The aim of this section is to provide a cohesive approach to the monitoring, collecting and recording of all information, enabling quality assured processes to be agreed and implemented to ensure accuracy and relevance of information gathered.

Appendices - the appendices sit alongside parts one and two of this document.

Part Three – CCM Training Manual

This portfolio of documents should be read in conjunction with the CCM Online Help available on the database by clicking the question mark icon or basic user guides on the CCM Support page on the Working with Children in Barnet website:
www.barnet.gov.uk/wwcib/ccm-support

Alongside this portfolio, Children's Centres and the local authority (LA) are required to enter into an Information Sharing Agreement for the passing of data between each other.

Part One – Framework

1. Framework Introduction

This agreement sets out the framework that the Children's Centres and Barnet Children's Service will work towards to ensure the effective operation of data collection and data management for Children's Centres in Barnet, using our Children's Centre Management Information System; CCM.

This framework is to be reviewed annually.

Commencement date: 1 April 2013
Review date: 31 March 2014

The framework aims to:

- provide a mechanism for Children's Centres to ensure the CCM system meets the service needs of Barnet Children's Service
- provide a quality process for the delivery of performance data through a well-defined data quality model
- set standards for data integrity.

In working to this aim, Barnet Children's Service will:

- support Children's Centres on the operational usage of the system
- provide user access to the system
- undertake ad hoc audits to ensure data quality and integrity
- provide training to users
- organise and facilitate user groups through appropriate platforms
- provide relevant documentation that can be accessed by users
- attend local and national user forums.

Children's Centres will:

- ensure accurate data quality and integrity
- provide monthly performance data as requested by Barnet Children's Service
- ensure appropriate access levels are granted to its staff
- co-operate fully with audits set out by Barnet Children's Service
- ensure compliance with the Data Protection Act 1998.

2. Barnet Children's Service – Data Systems and Assurance Team

2.1. The role of the Data Systems and Assurance Team

The Data Systems and Assurance Team are responsible for the day to day management of CCM. The team provides a support service for users of the system; CCM Support.

2.2. Access for new Children's Centre CCM users

This must be requested using the CCM System Access Request Form (Annex A) by the Children's Centre Manager (or in their absence, the Deputy Children's Centre Manager).

The CCM system access request form can be accessed from the CCM Support page: www.barnet.gov.uk/wwcib/ccm-support

Completed forms should be sent to: ccm.support@barnet.gov.uk

All new CCM users must have been set up with an email account at their Children's Centre so that log in details can be sent to them.

Please note: log in details will not be sent to generic email accounts.

The above are the minimum requirements for allowing access to a database that holds personal and sensitive personal data.

All new CCM users must complete the CCM Basic User Training provided by the designated superuser in the Children's Centre before access will be granted.

In instances where a Children's Centre Manager requires access to the CCM system, the Data Systems and Assurance Team (CCM Support) will create an account. New Children's Centre Managers will be required to complete CCM Manager Training which will be provided by the Data Systems and Assurance Team.

2.3. User access

- CCM Support are responsible for creating user accounts on CCM.
- The allocation of new user identifications and passwords will be subject to authorisation from the centre manager.
- The level of access granted to any given user identification will match with the requirements of the role and will be subject to prior authorisation from a centre manager.
- A record of all user registrations will be maintained through systems auditing facilities or by manual record.

Table 1 identifies groups of staff that can be granted access on CCM as at 1 March 2014. CCM Support will undertake bi-annual audits to check access levels and access to the system.

Table 1: Access Groups on CCM

LBB System Admin	Local Authority staff (Data Systems and Assurance Team) that need access to support the Children's Centre with day-to-day activities (CCM Support).
Read Only	Local Authority staff that require access to data held on CCM for reporting purposes.
Superuser	Centre Managers and a designated user within the Children's Centre who have additional levels of access to the CCM database.
Family Support	Family support staff based in the Children's Centre.
Centre Administrator	Centre staff whose primary role is administrative duties in the day to day running of the Children's Centre.

2.3.1. Passwords

- New user accounts will have an initial password at the time of creation. Initial passwords will be strong passwords i.e.
 - at least 8 characters long
 - a mix of alphabetic, numeric and special characters
- A user will be required to change an initial password at the time of first log on.
- A user will be required to change their password on a regular basis. A 45 day duration is built into CCM logins.

2.4. Deactivating access for Children's Centre CCM users

The Children's Centre Manager must notify CCM Support of staff no longer working at the Children's Centre (this includes staff who are on long-term leave (including maternity leave). The notification should be made in writing to ccm.support@barnet.gov.uk before the last working day of the affected staff.

In instances where the Children's Centre Manager is no longer working at the Children's Centre, CCM Support will deactivate access from the system.

Children's Centre CCM users who have not accessed the system in the previous six months will automatically be deactivated from the system by CCM Support.

The Children's Centre Manager is responsible for requesting reactivation to the system for Children's Centre users. All users wishing to be reactivated will be required to attend a refresher training session with the designated superuser in the Children's Centre.

2.5. CCM support

2.5.1. CCM Support description

User support is delivered locally by designated superusers within each centre. Superusers can answer most basic questions on how to use (procedural), enter or extract information from the system.

The Data Systems and Assurance Team (CCM Support) provide the next level of support to users and will deal with all queries regarding changes to the structure of system, for example, drop down lists or merging. They will have primary responsibility of ensuring the system is suitable for the needs of the centres by adapting and creating processes to deal with changes in legislation.

CCM Support will provide an email support service; CCM Support.

2.4.2. Logging support calls

The information to be supplied by the Children's Centre to CCM Support will include (as a minimum):

- priority
- user's name
- user's telephone number
- details of incident, including screen shots where appropriate
- client identification number (if support call is related to a client record).

Email subjects should include the priority description and the subject of the support call.

2.5.2.1 Definitions

Priority 1

A core CCM service failure which, constitutes a loss of the service which prevents all users from working and has no workaround.

Please note: in the event of a Priority 1 CCM Support require a phone call immediately after a support email has been sent. CCM Support will immediately log a case with CACI.

Priority 2

A CCM service failure which has an adverse (but not critical) impact on the activities of the Children's Centre users and no work around is available.

Non-exhaustive examples:

- inability to input data
- inability to access reporting services
- errors with reports
- new user accounts (CCM System Access Request Form must be attached).

Priority 3

Queries/issues which do not affect the operation of the software or the Children's Centre.

Non-exhaustive examples:

- adding addresses
- questions and queries on system usage
- advice on running reports
- spelling errors
- misalignment of data on screen display
- updates to documentation.

2.5.3. Service hours

The CCM Support mailbox will be monitored during the following hours (excluding bank and public holidays):

Monday to Thursday 9am – 5.15pm

Friday 9am – 5pm

2.5.4. Estimated response times

CCM Support response times are measured from date/time of the email being received from the Children's Centre.

The following estimated response times will apply:

Priority level	Response time
Priority 1	ASAP (same working day)
Priority 2	1 – 2 working days
Priority 3	3 working days

2.5.5. CCM user groups

Termly CCM user group meetings will provide an essential platform for idea sharing and problem solving. These meetings will be organised by the CCM Support team to discuss:

- reporting/performance data
- data quality
- data protection
- auditing/duplicates
- review CCM Framework
- review CCM Data Guidance Manual.

The Children's Centre Manager and/or superuser have a responsibility to either attend or send a nominated representative to each user group.

The Children's Centres will be notified on any developments to the system through the CCM user group or by email.

2.5.6. Communication

All CCM documentation is made available on the CCM Support webpage on the Working with Children in Barnet website. This page can be accessed from the following link: www.barnet.gov.uk/wwcib/ccm-support

CCM Support will send a monthly email update to all users of the system (CCM Post-it).

2.4.7. Chargeable work procedures

Where a Children's Centre requires additional support or training to what is detailed in sections 2.1 and 2.5 of the CCM Framework there will be costs incurred.

Additional CCM Support is charged at £60 per hour.

2.4.8. Contact details

All queries/issues to be sent to the dedicated support email account:
ccm.support@barnet.gov.uk

All CCM documentation is available to download on the CCM Support page on the Working with Children in Barnet website: www.barnet.gov.uk/wwcib/ccm-support

Another platform of support available for all users of CCM is a web forum to network and raise general issues on best practice and procedures which provides peer support.

The forum can be accessed on the following page: <http://cypforum.caci.co.uk>

Email: ccm.support@barnet.gov.uk
Web: www.barnet.gov.uk/wwcib/ccm-support
Forum: <http://cypforum.caci.co.uk>

2.5 CCM training

2.5.1 CCM training for new users

Training for new users is delivered locally by superusers using the CCM Basic User Training Guide (section 3 of the CCM portfolio of documents).

The CCM Basic User Guide can be accessed from the CCM support page:

www.barnet.gov.uk/wwcib/ccm-support

Training should be delivered on the CCM training database. For login details contact CCM Support.

Once a term CCM Support will run a compulsory half day session for new CCM users to follow on from the training delivered locally by the superuser.

Please note: Failure to attend this session will lead to the withdrawal of access to the system.

2.5.2 CCM training for Children's Centre Managers and superusers

In cases where there is a new superuser, the existing superuser will be expected to provide training locally. If this is not possible, CCM Support will provide the training.

CCM Support provides training to new Children's Centre Managers on an as and when basis.

This training will cover:

- an overview of key concepts, including data protection responsibilities
- data correction and merging duplicates
- an overview of system functionality (i.e. what their staff can do)
- interrogation of data (reports, etc.)
- an overview of casework.

2.5.3 CCM refresher training

CCM Support will run annual refresher training sessions for Children's Centre Managers and superusers.

Refresher training will cover:

- Reporting for SEFs
- Reporting for Children's Centre data packs
- Ofsted data requirements
- Reporting on casework.

2.5.3 New system functionality

Where there is new system functionality or significant changes to system usage CCM Support will provide training for centre managers, superusers and where required any other nominated users.

2.5.4. Chargeable work procedures

Where a Children's Centre requires additional training to what is detailed above there will be costs incurred. Please refer to section 2.4.7 for further information.

3. Data Protection: data quality and data security

3.1. Data quality

Barnet Council is committed to ensuring that all data is processed in accordance with the Data Protection Act (DPA) and that it adheres to six key 'quality' characteristics:

- **accuracy** – data has been calculated without errors, and adheres precisely to any applicable definition. Reasonable checks have been undertaken
- **reliability** – data reflects stable and consistent collection processes across collection points and over time
- **timeliness** – data capture occurs as quickly as possible after the event or activity, and is reported in a timely fashion
- **relevance** – data is applicable to the issue and provides the answers needed
- **completeness** – data comprises of all necessary elements and lacks nothing
- **a clear audit trail** – a documented process for obtaining and using the data, which is understood by all involved in producing the data, and accessible to those who rely on the data.

It is the responsibility of the Children's Centre Manager to ensure that all data is processed in accordance with the DPA and that they adhere to these 'quality' characteristics. For further guidance on the Data Quality Policy please contact CCM Support.

The Children's Centre Manager is responsible for ensuring data inputted on to the CCM system is accurate and up-to-date; CCM Support will undertake ad hoc audits throughout the year to ensure data integrity and quality (see table 2).

Table 2: Data monitoring schedule

Task	Frequency	Responsibility	Monitored by
Entering of registration forms	Daily	Children's Centre Manager	Early Years Team
Entering of activity data	Within 3 working days	Children's Centre Manager	Early Years Team
Entering of family support (casework) data	Within 3 working days	Children's Centre Manager	Early Years Team
Responding to CCM queries	Within 3 working days	CCM Support	Children's Centre Manager
Auditing of activity data	Quarterly Ad hoc	Children's Centre Manager Early Years Team	CCM Support
Auditing of family (registration) data	Quarterly Ad hoc	Children's Centre Manager Early Years Team	CCM Support

Task	Frequency	Responsibility	Monitored by
Update on centre performance	Quarterly	Children's Centre Manager	Early Years Team
Data quality tasks (2 x data cleansing exercises)	Monthly	Children's Centre Manager and superuser	CCM Support
Review of duplicates (individuals and events)	Quarterly	Children's Centre Manager	CCM Support
Review of inactive CCM accounts	Quarterly	Children's Centre Manager	CCM Support
CCM usergroup	Quarterly	Children's Centre Manager	CCM Support
Basic user overview training for new users	Termly	CCM Support	Children's Centre Manager
Basic user training for new users	Ad hoc	Children's Centre superuser	Children's Centre Manager
Refresher training for centre managers and superusers	Annually	CCM Support	Early Years Team
Review of reporting requirements	Annually	Early Years Team CCM Support Performance and Insight Team Children's Centre Managers	All
Requests for specific reports from CCM	Ad hoc	All	CCM Support
Archiving records	Termly	CCM Support Children's Centre Manager	CCM Support Early Years Team

Where there is a requirement for system downtime, CCM Support will notify all CCM users within 1 working day.

Please note: in some instances this notice may not be possible.

3.2. Data protection and security

The Children's Centre Manager must ensure the centre complies with all relevant aspects of the Data Protection Act 1998 (DPA), particularly when dealing with sensitive information.

Children's Centres are required to enter into an Information Sharing Agreement with the local authority to enable data sharing between the two organisations (see Information Sharing Agreement, separate document).

The Children's Centre Manager shall:

- ensure that personal data is appropriately stored and processed in accordance with its obligations under the DPA
- ensure that all staff have been appropriately trained and have a clear awareness of their responsibilities under the DPA
- take appropriate technical and organisational measures against the unauthorised or unlawful use of confidential information
- take appropriate measures against accidental loss, damage or destruction of confidential information
- not disclose any personal data to any third party unless they are permitted to do so by the DPA
- ensure that any breaches of data security or data loss are fully investigated and managed in line with appropriate Information Commissioner's Office (ICO) guidance¹
- cooperate fully with any data protection audits by LB Barnet and respond promptly to any data protection questions.

The ICO registered organisation under which the Children's Centre operates is responsible for complying with the Freedom of Information Act 2000.

CCM registration form - this should be stored for the duration of the individual being active on the CCM system.

Activity registers - for auditing purposes these should be kept for at least one year.

Further information on the Data Protection Act 1998 and Freedom of Information Act 2000 can be obtained through the Local Authority by contacting the Data Systems and Assurance Team (Annex B - Contact Details).

¹ ICO Guide to Data Protection: http://ico.org.uk/for_organisations/data_protection/the_guide

4. CCM Audits

CCM Audits can take place at any time and will be undertaken by the Early Years Team.

The purpose of the audit is to ensure the CCM Portfolio of Documents:

- is in place (awareness of the processes and procedures in place)
- is common knowledge (understood by all users of CCM within the Children's Centre)
- is integrated in working practices (used by all users of CCM within the Children's Centre)

The Early Years Team is responsible for monitoring the data integrity of information input onto CCM; this will be done through regular audits of the system as identified in this document.

At the audit, the officer will:

- check the accuracy of information against event registers and family registrations
- highlight any discrepancies found and make appropriate recommendations
- ensure the requirements of this framework are being adhered to
- check event registers are being correctly recorded.

Following the audit, the officer will:

- compile a brief summary of the findings and record an outcome of the audit along with any recommendations
- contact the Children's Centre Manager where issues have been identified
- provide a copy of the summary to the Children's Centre Manager, Early Years Team and the Data Systems and Assurance Team
- support the Children's Centre with any training needs that are raised during the audit visit
- inform the Data Systems and Assurance Team of any concerns.

During the audit, the Children's Centre will:

- provide any documents requested during the audit (i.e. registration forms, daily activity registers)
- co-operate fully with the audit
- assign a lead person for the Children's Centre who has responsibility for CCM on a day-to-day basis.

Centres will be given a performance indicator status (Red/Amber/Green – RAG rating) on aspects of data quality and where there is a red or amber shown they will be given recommendations on how to improve data quality in that area.

For further information about the auditing process, please contact the Early Years Team.

5. Archiving and record destruction

5.1. What is archiving?

Archiving records is the practice of setting a flag on selected records for individuals or families on CCM, who are not expected to access centre services again. These records will remain inactive on the database where they can be retrieved if needed.

This process partitions CCM into the operational database (current records that are still required by the centre) and the archive data store (inactive family records that need to be retained but have no expectation of being used again for business purposes).

Registration forms must be shredded at the point a family is archived on CCM. It is the responsibility of the Children's Centre Manager to ensure archived families' registration forms are disposed of in the appropriate manner. Failure to comply with this requirement is a breach of the Data Protection Act 1998.

5.2. Archiving schedule

Table 3: Archiving schedule

Records to be archived	Timings	Identifying records
No attendance (at any centre) for 18 months	After 18 months of no activity.	CCM Support will provide each centre with a list of individuals/families meeting this criterion on a termly basis.
Families with no under 5s or pregnant carers	After 6 months of no activity.	CCM Support will provide each centre with a list of individuals/families meeting this criterion on a termly basis.
Children aged 5 plus where there has been no family support involvement	After 6 months of no activity.	CCM Support will provide each centre with a list of individuals/families meeting this criterion on a termly basis.
New birth families that do not want to register at the centre	Records should be archived on an ad-hoc basis following contacting the families. If the family does not wish to register at the centre the record should be archived.	Centres should make contact with new birth families upon receiving the forms.
New birth families that do not register at the centre	After 6 months of no activity.	CCM Support will provide each centre with a list of individuals/families meeting this criterion on a termly basis.

Records to be archived	Timings	Identifying records
Deceased individuals	Records should be archived on an ad-hoc basis where the centre has been informed of the death.	Annual CCM registration audits by centre.
Families that have moved out of an address with no forwarding information	Records should be archived on an ad-hoc basis where the centre has been informed of a new family moving to the address.	Annual CCM registration audits by centre. New registrations.
Family support casework records	Once the family support involvement has ended the casework record should be archived.	Family support casework supervision.

5.3. Record destruction

Data involving individual case management in the provision of support by Barnet Children's Centres to families should be retained for seven years following file closure.

This includes data on:

- parenting skills
- special education
- attendance records
- project files.

The date the record is archived will mark the file closure.

CCM Support will run annual reports to identify any records that should be deleted from the system.

It is the responsibility of the centre manager to check that all records identified on the list should be destroyed. Once this has been confirmed, CCM Support will delete the records.

Part Two - Data Guidance (for all users of CCM)

1. Data guidance introduction

The aim of this section is to ensure a cohesive approach to monitoring, collecting and recording of all information, enabling quality assured processes to be agreed and implemented to ensure accuracy and relevance of information gathered.

This guidance should be read in conjunction the **Children's Centre Management Information System CCM - Framework**, and **Children's Centre Information Sharing Agreement**.

CCM is used to record, collect and collate information about users of Children's Centres in Barnet. The type of information it holds includes information about families, carers and children, ethnicity, religion, events and activities attended (please note this list is not exhaustive).

The system also enables reporting on all the information input into the system. Reports are available at postcode, super output area (SOA), Children's Centre reach, locality and borough level. CCM supports the sharing of information across centres and with the local authority.

This data guidance document is a living document that will be updated as changes in requirements, legislations or processes take place.

2. Troubleshooting

2.1. CCM queries

In the first instance, Children's Centre CCM users should speak to their local superuser (see Annex C for list of current superusers) who may be able to assist with any queries. Those not able to be dealt with the queries within the Children's Centre should be addressed to ccm.support@barnet.gov.uk

2.2. Access for new Children's Centre CCM users

For further information on access please see Section 2, CCM Framework.

2.3. User access

CCM Support is responsible for creating user accounts on CCM. For further information on access please see Section 2, CCM Framework.

2.4. Deactivating access for Children's Centre CCM users

For further information on deactivating access please see Section 2, CCM Framework.

2.5. CCM training

For further information on training please see Section 2, CCM Framework.

2.6. CCM user group

For further information on the CCM user group please see Section 2, CCM Framework.

3. Data quality and security

The quality of information provided on CCM is essential. In short, CCM is only as good as the information entered into it. If the information is of poor quality, the reports provided will be of poor quality.

Children's Centres are responsible for promoting good data quality gathering and data entry within their centre. Accurate data collection provides a good picture of performance and enables informed decision making for Children's Centre Managers. Data should be captured as quickly as possible after the session and must be available for the intended use within a reasonable time period. Data must be available quickly and frequently enough to support information needs and to influence service or management decisions.

What does 'good quality' data mean?

It is data that is:

1. accurate
2. up-to-date
3. free from duplication (in terms of families, carers, children and events)
4. free from confusion (where data is duplicated or held in different places on the system).

3.1. Purposes of data

Table 1 shows how the definition applies to the specific purposes that data is used for by the council and the Children's Centres, and gives practical examples of the actions that Children's Centres are required to take in order to deliver good data quality.

Table 1: Purposes of data

Purpose of data	Why data quality is important	Guidelines for Children's Centres
Ofsted requirements	Ofsted inspects Children's Centres to provide independent external evaluation of its effectiveness and what it should do to improve. This is based upon a range of evidence.	<ul style="list-style-type: none"> • Relevant data is collected, stored and reported on.
Service delivery	The delivery of services is dependent on the intelligent use of high quality data. For instance, allowing resources to be targeted accurately.	<ul style="list-style-type: none"> • Children's Centre staff are all trained on the importance of inputting accurate data. • Data is collected, processed and shared in compliance with the Data Protection Act (1998) and the Freedom of Information Act (2000). • Only relevant data should be collected. Service users will not be asked unnecessary questions.
Strategic planning	To plan effectively for the future we need high quality data that allows us to understand what the most important strategic challenges are, what resources are available to meet them, and we need to be assured that the decisions we make now are the correct ones based on good quality data. It also allows us to compare centres and benchmark against other local authorities and to identify areas of our performance that we need to improve.	<ul style="list-style-type: none"> • There are clear processes in place for aggregating service level data and reporting it to key audiences. • Clear communication explains the need to produce high quality data. • Benchmarking data is used appropriately to allow us to identify areas of weak or strong performance. • Assurance of accuracy given by the data owner on all data that will be used for strategic decision making or planning. • Clear requirements and consistent standards for the use of geographical data. • Only aggregated or anonymised data will be used.

Purpose of data	Why data quality is important	Guidelines for Children's Centres
Managing the business	Managing a Children's Centre involves a wide range of activities that enable the delivery of effective frontline services. This includes managing the building and staff, maintaining efficient and effective information systems, understanding the risks that affect the centre, developing and managing contracts with delivery partners, and ensuring that the necessary resources in place and correctly allocated to make all of this possible. All of these activities (and many more) require good quality data.	<ul style="list-style-type: none"> • Managers understand the need to keep up to date data and accurate records • Senior managers initiate and action research to identify areas of poor data quality and deliver improvement. • All staff and delivery partners understand that data quality is everyone's business. • All data is collected in line with legal requirements.
Oversight and Governance	It is important that the Children's Centres' Advisory Board and senior officers are able to have oversight of the way the Children's Centre services are being run, and can take action as soon as any problems are identified. The Data Quality Officer also has an oversight role for spot checking the quality of data and facilitating improvement.	<ul style="list-style-type: none"> • The Children's Centre is the data owner with responsibility for ensuring the quality of that data. • All data given to decision making bodies (i.e. Advisory Board) has been signed off by the Children's Centre Manager. • Children's Centre Managers should ensure that all staff understand their role in the collection/inputting of data.
Accountability and transparency	The final, and important purpose for having data, and for needing good quality data is so that the Children's Centre council can be held to account for the services it provides, for instance through performance and through Freedom of Information requests. This allows residents to engage with the democratic process, to ask questions based on the data and the council to give responses based on high quality data.	<ul style="list-style-type: none"> • Where possible data produced by the Children's Centre should be available to be published in support of transparency. • Data released in response to Freedom of Information Act requests should be prompt and of consistently high quality and relevant to the question asked.

3.2. Data quality

For further information on data quality please see Section 3, CCM Framework.

3.3. Data quality monitoring

The monitoring of data quality is a collective responsibility that all users of CCM need to be aware of. This can be done by running system monitoring reports within CCM which will address inconsistent data.

The Children's Centre Manager is responsible for promoting good data quality gathering and data entry within their centre. Regular monitoring of missing, incomplete or invalid records will take place by CCM Support to ensure that the centres are managing their data accurately.

3.4. Data protection and security

Any information that can identify an individual i.e. name, should never be sent by email. Always use the identifier (ID) number when referring to individuals.

All employees, Barnet Councillors, and partner organisations (suppliers and contractors) that have been permitted access by the council to personal data are responsible for ensuring that no security breaches occur as a result of their actions. Everyone must be aware of their responsibility to report any potential, suspected or actual incidents in regards to data loss and breaches.

It is important that all incidents and suspected incidents are reported. Incidents must be reported to the Data Quality Officer, in Children's Services – Data Systems and Assurance Team (Annex D), as soon as an incident has been identified. Timeliness of reporting is key to ensure measures are put in place to contain the damage and begin the recovery process.

Table 2: Data Protection dos and don'ts

Do	Don't
<ul style="list-style-type: none">• Lock screens (Ctrl+Alt+Delete) and/or log-out of CCM when leaving PCs unattended• Secure all personally identifiable information when not in use (e.g. lock away client files at the end of the day)• Dispose of personal data as confidential waste• Only remove paper records from the building with the appropriate authorisation. Please refer to the Council's Paper Handling Policy.	<ul style="list-style-type: none">• Don't share your password• Don't send external emails containing sensitive personal data unless authorised by a senior officer or via a secure email connection e.g. USO-FX or encrypt and send• Ensure emails containing personal data are addressed to individuals only, not generic or all-user addresses

For further information on data protection and security please see Section 3, CCM Framework.

3.5. Audits

For further information on audits please see Section 3, CCM Framework.

3.6. Data correction

Where errors and missing data are identified, in the first instance this will be reported back to the Children's Centre Manager who will be responsible for ensuring the data is completed and updated as soon as possible. Children's Centres need to take responsibility for ensuring that child and family records are updated with new information as it becomes known, for example, change of address or name as a result of a 'change of details' form being completed (the form can be downloaded from the CCM Support page).

3.7. Duplicate records

There should only be one record per individual on CCM. Duplicates can be avoided by carrying out a thorough search within CCM prior to inputting any new staff. A number of data quality reports can be run to identify duplicate individuals on the system – see Basic User Guide to CCM. Where duplicates are identified the staff should contact the Children's Centre superuser with the details of the two families concerned stating which record they would like to keep. Duplicates can only be merged by Children's Centre superusers or CCM Support.

3.8. Use of CCM

- The system must only be used for the purposes you are instructed.
- You should not access the system from anywhere but the Children's Centre or designated outreach venue.
- Never share or disclose your username or password details.

3.9. Data extracts and printing

- Only extract or export from the system when authorised to do so.
- Any extracted, electronic or printed data is governed by the same data protections laws as the CCM system.
- Only print personal data when absolutely necessary and always dispose of information securely when it is no longer required.
- Remember, even printouts need to be held securely.

3.10. Archiving and record destruction

For further information on audits please see Section 5, CCM Framework.

4. Registration form

A standard registration form has been developed and all centres are required to use the form to ensure all centres collect the same information in a consistent manner.

Forms can be downloaded for use from: www.barnet.gov.uk/wwcib/ccm-support

There is also an electronic version of the form that can be completed online. This form can be accessed from: www.barnet.gov.uk/childrens-centres

Please note: In addition to the registration form, there is also a change of details form that can be downloaded for use from: www.barnet.gov.uk/wwcib/ccm-support

Please refer to section 4.3 for further details.

4.1. Why do we need a registration form?

The form has been developed to obtain data required for reporting and planning purposes. Correct use of the form ensures consistency of data collection and enhances accuracy of data reporting, as well as compliance with the Data Protection Act as data subjects have to be informed of what data we collect, how we store, process and use it and how we dispose of it (privacy notice to comply with fair processing requirement).

It is the responsibility of the Children's Centre to work with families to complete the form accurately. This also provides a good opportunity for the needs of the family to be identified and will ensure that information is collected consistently across the borough.

4.2. Privacy notice

The CCM registration form includes a privacy notice detailing why the information is being collected from families, how it will be used and how it will be stored.

The following information is important in communication with parents/carers who are hesitant to complete the form:

- the data is required to provide and plan for the most suitable services to families
- the data is required by the centre in order to evidence the need for sustained funding to deliver services to families
- the data is stored in a secure database
- the Children's Centre and London Borough of Barnet shall fully comply with its obligations under the Data Protection Act 1998.

4.3. Registering individuals/families on CCM

New individuals/ families joining the Children's Centre are required to complete a registration form; new registrations must be inputted onto CCM daily.

All centre staff need to ensure they capture all the information on the registration forms, where possible. If a family need support with this then it should be done by a centre staff member completing the form with the parent/guardian to ensure that all the necessary information is obtained, and is recorded by someone trained to understand the questions and convey them in a consistent manner.

4.3.1 Change of details

Families already registered with other Barnet Children's Centres do not need to complete a registration form unless their details have changed. In this instance, a 'change of details form' should be completed.

Where a family completes a change of details form the Children's Centre must ensure the relevant fields are updated on CCM and the form stored with the original registration form.

Please note: The change of details form is to be used when a family's circumstances have changed including contact details and the birth of new babies.

4.3.2 Inactive families

The system does and will continue to host 'inactive individuals/families'. Centres are required to archive records on the system if they meet the criteria set in section 5 of the CCM Framework.

It is the responsibility of the Children's Centre Manager to ensure this process is carried out using reports provided by CCM Support.

Registration forms must be shredded at the point a family is archived at the Children's Centre. It is the responsibility of the Children's Centre manager to ensure archived families' registration forms are disposed of in the appropriate manner. Failure to comply with this requirement is a breach of the Data Protection Act 1998.

If an archived family returns to a Centre they will need to complete a registration form, at which point their record can be reactivated and details can be amended.

4.4. CCM registration process

Children's Centres are responsible for inputting the data collected in the registration form to CCM. The process relating to the registration of families has been defined in four simple steps:

1. Contact and data collection

When there is any contact with a family they should be asked whether they have completed a registration form at any Barnet Children's Centre.

If they have not completed a form before, the Children's Centre will be expected to provide assistance to complete the form if needed.

Where a family attends another Children's Centre to that which they have originally registered with, they will not need to complete an additional form unless any of their details have changed. In this instance the family will be required to complete a change of details form.

2. Search for family on CCM

The Children's Centre staff should then search CCM for all carers and children on the form. Various search criteria should be used to check if the carers or children are already on the system (remember any of them may have been registered at another Children's Centre so will already be on the CCM system).

Before loading any data into CCM, search for ALL family members. Do not assume that if the parent/carer is not on the system that the child is not.

The system will host 'archived families' who previously registered with the centre but are no longer accessing services. To avoid creating duplicate families in the database it is important that all centres search both active and archived families before entering data into the system.

Some protocols to follow when searching for an individual are as follows:

- Initially search on surname and forename using the first few letters of each, for example, if carer was named Abigail Stevens then search on CCM with the first few letters of each, as a forename and surname can be spelt in various ways:

Forename (various possibilities)	Surname
Abigail	Stevens
Abbeygail	Stevens
Abbiegale	
Abbigail	

- If no record found then search on date of birth only.

- Remember they could be on the system as a different name. For example, a William McBride could be on the system as Bill McBride or even Billy McBride.
- You may also wish to try other searches such as a search on post code.

In addition to the searching protocols, a number of validations checks can be performed:

- Check the other family members (be aware there could be some discrepancy as family members may have died or new family members arrived).

Please bear the above protocols in mind as the aim is to avoid duplication.

3. Input/update data into CCM

If the family is found on CCM, the details of the family should be updated with any new information. If they cannot be found on the system they will be added on as a new family.

The identifier for each family member from CCM will then be recorded on the form and the form filed away in a secure location.

4. Additional information about target groups

The registration form will allow you to capture additional information which will inform reports for target groups.

Table three lists the data collected in the registration form that translates to additional information about target groups:

Table 3: Target group data

Target group	Target group description	Section of the form
Young parents	Parents that are under the age of 25.	Carers details: date of birth
Lone parents	Single parent family.	Carers details: Lone parent
BAME (black, Asian and minority ethnic)	Taken from the DfE definition, is anyone who has not chosen 'White', 'refused' from the ethnicity codes on CCM.	Ethnicity
English as an additional language (EAL)	Any language that is not English.	Language
Unemployed	Where one adult member of the family is unemployed.	Carers details: Employment status
Workless households	Where no-one in the household is working.	Carers details: Employment status

Target group	Target group description	Section of the form
Vulnerable families	Include children who are on a child protection plan (CPP), child in need (CiN), having a disability or special educational needs (SEN) or are looked after (LAC).	Child details: special need or disability
Deprived LSOAs	All LSOAs in a reach that have an IMD score of 30% or less.	Postcode

4.5. Storing hard copies of the form

Children's Centre Managers should ensure that the completed hard copies of the registration forms are securely stored in the centre until they are shredded.

The form should be stored for the duration of the individual being active on the CCM system.

Centre staff should ensure they enter the CCM identifiers for each family member onto the forms once their details have been entered onto the system.

The forms must not leave the Children's Centre where the family registered.

Centre's can run reports to identify families who live within their reach but are registered/accessing elsewhere.

4.6. Identifier (ID) numbers

When information from the registration form is entered in CCM, ID numbers are generated by the CCM system for each individual and these need to be written against each family members form before being filed. This will:

- ensure any replacement staff or management can easily recognise who has and hasn't been entered onto the system
- enable a staff member looking at the registration form to quickly search for a family on CCM using their ID number
- if a family moves into another centre's reach area their ID number will not change
- when a duplicate record is merged, staff need to ensure that they have the right ID on the registration form.

4.7. Moving of individuals into a new family

There will be times where an individual will need to have relationships established with other families in the system, for instance a child moved from a childminder into their own family's record or from one family to a foster carer.

Once a member is already in the system, you only need to establish a relationship with the new family being created. An update of the new family should be linked to the child already in the system using the relationships tab.

It is essential to ensure the relationships defined in both family records are accurate and up to date. See Basic User Guide Section 4: Individual full detail for further details.

4.8. Childminders

A childminder has the permission to sign up children on behalf of the parents/legal guardian.

The childminder should be added to a separate address to the child, but should be linked to the child/family through the relationships tab.

In the case of a childminder having their own children who are under the age of five, they should register in their own right with their children to the Children's Centre.

All registered childminders should be recorded as 'registered childminders' on the adult tab in the individual's record.

It is best practice to ask childminders to ask the parents of the children (in the childminders care), to complete a registration form and return to the centre.

4.9. Sections of the form

The registration form contains various sections as follows:

Table 4 – CCM registration form: Part 1

How did you hear about the centre?	This information helps to monitor marketing activity performed by the centre.
First parent/carer	<p>This refers to the parent/legal guardian, where a child is looked after a childminder the form must be completed by the parent/legal guardian. In no instances should the form be completed by the childminder.</p> <p>First parent/carer - this refers to any other main carer who has a significant relationship with the child. For example, grandparent.</p> <p>If the carer has a different address from the main carer this should also be recorded.</p>
Second parent/carer	<p>In providing the details of another parent/carer, the first parent or carer must accept responsibility for informing them that their details have been passed onto the Children's Centre.</p> <p>The registration form has space for two carers. However, CCM will allow you to add as many carers as you think appropriate in the circumstances.</p> <p>Families should use an additional form if there are more than two carers linked to the family.</p>
Name	The full legally registered name is required; parents and carers should be advised not to use nicknames.
Date of birth	<p>This information is used to plan individual needs and services.</p> <p>For parents/carers it is used for reporting purposes, especially linked to young parents.</p>
Relationship to child	It is essential that the relationship types are linked accurately as the relationship will have implications for reporting requirements.
Gender	<p>This information is used to plan individual needs and services.</p> <p>For parents/carers it is used for reporting purposes, especially linked to fathers and male carers.</p>

	For children it is linked to EYFSP (early years foundation stage profile) data.
Address	<p>All Barnet addresses have been pre-populated on CCM.</p> <p>If the address is occupied on the system by another family, the existing family should be archived on the system and the address will have to be added as a duplicate by CCM Support.</p> <p>In instances where a family lives out of borough the address will need to be manually added to the system by CCM Support.</p>
Postcode	<p>It is important to enter the postcode on each registration. This information is used for searching for families.</p> <p>The postcode determines the super output area and Children's Centre reach.</p> <p>This information is also used for reporting purposes both locally and by the local authority.</p>
Language	<p>Determining the main language spoken will assist centres in monitoring the different languages spoken in their community.</p> <p>If a language required is not on the list please email ccm.support@barnet.gov.uk to request its addition.</p>
Disability	<p>This section allows you to record if the parent/carer has a disability.</p> <p>The Disability Discrimination Act 1995 defines a person as having a disability if (s)he: <i>'has a long term physical or mental impairment which has substantial and long term adverse effect on his/her ability to carry out normal day to day activities'</i></p>
Additional details	<p>This section collects information that is used to plan individual needs and services and also link in with Ofsted requirements and performance reporting.</p> <p>This section collects information on if the parent/carer is:</p> <ul style="list-style-type: none"> • a childminder • a lone parent • pregnant • planning to breastfeed • a refugee/asylum seeker
Child/ren's details	The CCM registration collects the details of up to four children, although the system can accommodate as many children as needed.

	Families should use an additional form if there are more than four children in the family.
Special needs	<p>Special Educational Needs are specific classification that must been given to a child or parent by the LA or Health Services.</p> <p>One of the following categories can selected for all children registered in CCM:</p> <ul style="list-style-type: none"> • No Special Education Need • School/Early Years Action • School/Early Years Action Plus • Statemented
Emergency contact	Emergency contact information for the child/ren.
Consent	<p>The registration form collects the following consent from the parent/carer:</p> <ul style="list-style-type: none"> • Photographic consent – consent to take photographs of parents and children that are accessing centre services that can be used for display purposes. • Surveys and evaluations – consent to contact parents/carers to take part in evaluations to help improve services • EYFSP tracking – consent to track the child's progress up to the end of reception.
Interest in services	This information should be used to inform service planning and to target marketing activity.

Table 5 – CCM registration form: Part 2

Employment	<p>Centres will need to report on the number of children in workless households.</p> <p>This information will also assist centres to plan and develop services.</p> <p>Standard employment classifications have been pre-populated into CCM.</p>
Benefits	<p>This information will assist centres to plan and develop services.</p> <p>A list of benefits have been pre-populated into CCM.</p>
Ethnicity	<p>This information is required for local and national reporting. DfE standard ethnicity codes have been used in this section.</p>
Religion	<p>This information is required for local and national reporting.</p>
Health professionals	<p>Health professionals can be linked to individual/family records. The registration form collects the following:</p> <ul style="list-style-type: none"> • GP and GP surgery • Health Visitor • Midwife • Dental practice
Dental check	<p>Data collected around children's dental checks should be used to appropriately refer and signpost to health if dental checks are not up to date.</p>
Smoking	<p>This information will assist centres to plan and develop and target services.</p>
Immunisations	<p>Data collected around children's MMR1 and MMR2 immunisations should be used to appropriately refer and signpost to health if immunisations are not up to date.</p>

5. Contact with families

5.1. What counts as a contact with a family?

All contacts with a family/individual must be recorded on CCM whether the service is being delivered in the Children's Centre, in the family home or through an outreach facility, if it is being delivered directly by the Children's Centre or through one of the commissioned services.

Contacts to be recorded must be meaningful contacts, i.e. not just a quick 'hello' in the street or a text to remind someone of an activity.

A meaningful contact is where there is an exchange of information between two parties or a person is attending a service or facility which is part of the Children's Centre's core purpose.

The contact can be direct face-to-face contact or telephone contact.

For example, a family support worker may visit a family in their home which would be one face-to-face contact, but they may do a follow-up by telephone call at which there is an exchange of information. This would also be recorded as a contact.

If there was a 'messy play' session running from a village hall and it is being run by a commissioned service on behalf of or as part of the Children's Centre offer then the families that attend that session must be recorded and entered onto CCM.

If there is a parent and toddler session running that a family support worker attends and speaks to families there, then there must be a record of who attended that group and one for the family support as an outreach session as they are delivering part of the Children's Centre's purpose and the Children's Centre are inputting family support time and resources. This is the same for health visitor clinics where the family support worker may attend.

5.2. Types of contacts with families

There are four types of contact with families and individuals should be recorded on CCM:

1. Session attendance
2. Casework
3. Referrals
4. Notes

5.2.1 Session attendance

Once families are registered on CCM they can be recorded as attending sessions of activities run by the Children's Centre.

Once an individual has been listed as having attended a session this will be recorded in the details of the session as well as creating a record of attendances for the individual on their record.

Recording all individuals' attendance at sessions is of paramount importance to running reports on accessing data.

Details of how to record a session are in the CCM Basic User Guide (part 3 of this portfolio of documents).

5.2.2 Casework

If a family or individual is in receipt of family support services the casework section of CCM can be used to keep a chronological record of details about the aims and support being provided and to keep a record of correspondence, changes and referrals, reviews and progress.

Please note: a family support referral must be received by the centre to provide this service.

See the CCM guide to recording casework for further details.

This guide can be downloaded from: www.barnet.gov.uk/wwcib/ccm-support

5.2.3 Referrals

Referrals are always associated with a single individual and are therefore added to the system within the referrals tab of the individuals full details screen.

Referrals can be made to either a key worker in the programme, a particular activity, or to a service.

Every referral must be made by a key worker who is listed on the system, with the date the referral was made.

The referral notes section should be used to capture information about why the referral is taking place.

When the reason for the referral has been resolved, an outcome should be recorded against it.

Referrals recorded on CCM are used for performance reporting purposes, for example to monitor the number of referrals to services such as FEE2, Welfare Rights, EYVF.

Details of how to record referrals are in the CCM Basic User Guide.

5.2.4 Notes

Extended notes are always associated with a single individual and are therefore added to the system within the notes tab of the individuals full details screen.

Notes should be used to record and additional information about the individual or family. This could include information about support given that is additional to what is offered in children's centre activities, but not as high level as family support work.

Notes should also be used to explain in detail what was covered in 'significant contact' situations. For example, if a family support worker spends 20 minutes giving breastfeeding support advice to a new mother.

Details of how to record notes are in the CCM Basic User Guide.

5.3. Activities and sessions

Recording sessions on CCM keeps a log of all sessions run by the centre, who they were run by and who attended.

All sessions must be created in full using the Session Relationship Table as guidance (see CCM Basic User Guide Section 3: Attendance Menu).

Activity registers should collect the following information about the session and the attendees that should be input to CCM:

- Name of session
- Date and time of session
- Session location
- Session key worker(s)
- Session service provider(s)
- Session targets and aims
- Parent/carer's full name
- Child/ren's full name
- Attendee postcode.

5.3.1 Activity descriptions

All activities in CCM are pre-set into 23 categories. All sessions (events) can be freely created by centres which must fall into one of these activities.

The following activities are available in CCM:

- Additional information and advice
- Adult learning
- Baby groups
- Child health services
- Childminder groups
- Community support outreach
- Domestic violence
- Early learning and school readiness
- Early learning and school readiness
- Economic wellbeing
- Extended services
- Family support outreach
- Family support outreach home visits
- Health and safety
- Male carers groups
- Maternity services
- One-off events
- Parenting programmes
- Parents groups
- Parenting support workshops
- Safer families
- Special needs
- Stay and play
- Young parent groups

5.3.2 Session targets and aims

All activity groups have pre-set targets; these are in the form of tiers.

Definitions of tiered services

Tier 1 services

Tier 1 services are universal services that all families can access.

Tier 2 services

Tier 2 services are aimed at targeted families.

Tier 3 services

Tier 3 services are specialist services, and are only provided by external agencies / professionals.

Please note: the tier should be reviewed every time a new session is entered.

Additional targets should be recorded against every session. Targets classification will enable performance reporting based on specific levels of service, ensuring targeted services can be measured and reported on effectively and accurately.

The targets listed below can be assigned to sessions in CCM and link to the requirements in the Ofsted inspections framework for children's centres and with performance indicators set by the local authority.

- access to benefits
- access to training
- access to employment
- access to legal advice
- access to volunteering opportunities
- access to housing support
- smoking cessation
- transitions to solids
- healthy eating
- baby weighing
- immunisations
- oral health
- breastfeeding support
- ESOL
- adult learning

In addition to targets, aims of sessions can be recorded. These aims include:

- child development
- physical development
- emotional development
- social development
- language development
- building confidence
- creativity
- holistic play
- parenting support
- child sleep support
- toilet training support
- behaviour support
- safety in the home
- knowing your community
- healthy living

5.3.3 Session service providers and key workers

Service providers should be recorded against every session recorded on CCM. If the session was run by the children's centre this should be recorded.

If the session has been run by an external organisation, such as, Welfare Rights, Unity, REED etc. This must be recorded in the service provider tab.

By recording this you are able to run reports to show how many sessions have been run in conjunction with specific service providers, this information also links in with performance targets.

Key workers should be recorded for every session, this includes children's centre workers and external key worker.

5.3.4 Every Child Matters (ECM) outcome type

Selecting the ECM classification will enable reporting of all sessions that have been created under the Every Child Matters outcomes, for example, everything recorded under 'Be Healthy' can be reported on.

Only one outcome can be selected when creating a session, however individual occurrences of a session can have a different outcome for different dates for that event. Note that reporting from the activity level will not differentiate between ECMs while reporting on sessions will.

The five Every Child Matters Outcomes are:

- Enjoy and Achieve
- Achieving Economic Wellbeing
- Make a Positive Contribution
- Stay Safe
- Be Healthy

Please note: ECM is longer reported on for SEF so it is for information only.

6. Recording family support work

6.1 Casework

All open/active family support cases should be recorded on CCM using the casework section.

All of the contacts a family support worker has with a family should be recorded onto CCM in the casework section.

The casework functionality allows you to view and manage casework being done with specific families.

All casework records must include the following details at a minimum:

- name of family/individuals (their contact details should be listed in their individual records)
- reason for referral
- date of referral
- referring provider (this can include self-referral)
- review date (this should be 8 weeks from starting family support work)
- family support worker (key worker)

6.1.1 Casework actions

All contacts with the family should be recorded as case actions.

The following action types can be chosen from:

- | | | |
|---|-----------------------------------|-------------------------------|
| • CAF closed | • Manager's decision | • meeting with Social Care |
| • CAF opened | • meeting in centre | • meeting with Welfare Rights |
| • CAF review | • meeting with Health Visitors | • referral |
| • case supervision | • meeting with professionals | • referred to Safer families |
| • core group | • meeting with Safer Families | • referred to Social Care |
| • email/letter correspondence | • meeting with school / childcare | • referred to Welfare Rights |
| • feedback from parent | | • text message |
| • home visit | | |
| • Individual Education Plan (IEP) meeting | | |

Please note: case notes should be recorded as case actions and not in the notes section.

See the CCM guide to recording casework for further details. This can be downloaded from the CCM Support page.

6.1.2 Family support contacts

A family support worker can have different types of contact with a family. The following are the most common forms of contact:

- home visit
- telephone call
- one to one support anywhere other than the home setting.

All of the above contacts should be recorded as case actions in the casework section. In addition, home visits and one to one meetings should also be recorded as sessions. This is to ensure that attendance data is captured and can be used for reporting purposes.

All family support events that take place will fall into two main activities:

- family support outreach home visits
- family support outreach.

Family support outreach - home visits

If a family support worker is doing home visits then they must record the family members they visited not just the family name. The time and date of the visit must also be recorded.

When inputting this information onto CCM, each home visit must be recorded as a separate session. For example, if five home visits were completed in one day, then there will need to be five separate home visit sessions recorded for that date, otherwise it suggests that there was one home visit undertaken with five families all together.

If a family support worker is doing a registration visit for the first time to a family then they must try and get at least the basic information filled in on a CCM form so this family can be registered and the contact recorded.

Details and notes from the home visit given should be recorded in the casework section.

Family support outreach

Family support outreach sessions will cover all forms of family support provided except the home visits. Sessions that can fall into this activity includes:

- CAFs (reviews/meetings)
- outreach in centre
- outreach out of centre.

For example, if the family support worker is going into groups, such as a parent and toddler group, to support a referral family, then this could be recorded as

the following: Family support outreach - in centre. Details of the support given should be recorded in the casework section.

7. Reporting

7.1 System monitoring and data quality

The monitoring of data quality is a collective responsibility that all users of CCM need to be aware of. This can be done by running system monitoring reports within CCM which will address inconsistent data.

Regular production of reports of missing, incomplete or invalid records should be used to manage and correct these errors.

CCM support will send two data quality tasks to each centre every month to complete.

7.2 System monitoring reports

The following reports are the minimum template reports for system monitoring.

Quality monitoring	Description	Report name
No parent/carer	Active families with no carers, status can be updated.	Addresses with no parent/carer
No postcode	Active families with no postcode, status and postcode can be updated.	Addresses with no postcode
No family telephone number	Active families with no telephone number, telephone number can be inserted and status can be updated.	Addresses with no telephone
No date of birth	Status can be updated and date of birth can be set.	Children with no DOB
No ethnicity	Ethnicity can be updated.	No ethnicity
No language	Language can be updated.	No language
Overdue pregnancies	Active pregnant women and their due dates.	Pregnancies
Referrals with no outcome	Outcomes can be recorded against referrals made.	QI6 & QIH3 – Referrals list

7.3 Children's Centre performance measures

The local authority has set Children's Centre targets that relate to the framework for Children's Centres inspection from April 2013². These targets are split into six areas:

- Overall effectiveness targets (not recorded on CCM)
- Accessing services targets
- Quality and impact targets
- Quality and impact – health targets
- Management information (not targeted)
- Leadership and governance targets (not recorded on CCM)

For further information please refer to the Children's Centre Performance Framework document.

7.3.1 Performance reporting

Children's Centres are required to return performance data using the performance measures spreadsheet quarterly to the Children's Centre Coordinator (see Annex B – contact details).

There is a suite of performance reports available on CCM to extract performance data from the system.

For guidance on performance reporting, please refer to the CCM Guide to Performance Reports. This can be downloaded from the CCM Support page.

² Ofsted Framework available from: <http://www.ofsted.gov.uk/resources/framework-for-childrens-centre-inspection-april-2013>

8 Do's and Don'ts

Do

- Do ensure you have a Privacy Notice in accordance with the DPA to inform families and carers of what is collected for what purposes and how it's stored before entering any details onto the database.
- Do use capital letters for the beginning of names, both surnames and first names. The rest of the name should be in lower case.
- Do ensure you do a thorough search before entering a family.
- Do enter data on a timely basis and accurately.
- Do ensure that you are provided with a full address including postcode on the registration form.
- Do ASK for help if you are unsure about inputting any data.

Don't

- Do not use all capital letters OR all lower cases throughout the system.
- Don't add new families to addresses that have existing occupants. There will be instances where two families live at the same address; both families must have separate entries. This is to ensure accurate information about the family make up. To enter multiple families at the same address use the basic guide to adding new families at an occupied address.
- Do not enter a childminder as a carer of children within their care. To register the child, a registration form must be filled in by the parent/legal guardian.
- Do not enter carers/children with just an initial or title, e.g. Mr. in place of a name, instead find out what the full name is before entering any data.
- Do not make any assumptions about family information. If you do not know the information, do not add it to the system.

Children's Centre Management Information System: CCM

Appendices (for all staff)

Annex A – System Access Request Form

Putting the Community First		BARNET LONDON BOROUGH	
Children's Centre Management Information System; CCM System Access Request Form			
This code of connection is a requirement for anyone seeking to gain access to the Barnet Children's Centre Management Information System; CCM.			
User details:			
Name (printed)	<input type="text"/>		
Position	<input type="text"/>		
Email	<input type="text"/>		
Children's Centre	<input type="text"/>		
Access level required:			
Superuser			Please X <input type="checkbox"/>
Family Support			<input type="checkbox"/>
Centre Administrator			<input type="checkbox"/>
To confirmed by the centre manager:			
The new user has been made aware of the following acts, guidelines and policies:			
Data Protection Act 1998			Please X <input type="checkbox"/>
CCM Framework			<input type="checkbox"/>
CCM Data Guidance			<input type="checkbox"/>
The new user has:			
Completed CCM basic user training			Please X <input type="checkbox"/>
Completed CCM casework training (only to be completed if Family Support access level required)			<input type="checkbox"/>
Date of training	<input type="text"/>		
Trainer's name	<input type="text"/>		
Authorisation			
I certify that the above is a true position statement. I understand that failure to meet any part of this code of connection may result in disconnection.			
Requested by	<input type="text"/>		
Position	<input type="text"/>		
Date	<input type="text"/>		

Annex B – Contact Details

The various stakeholders involved in CCM.

Data Systems and Assurance Team – Schools and Settings

Lauren Burbidge Data Quality Officer	CCM Support	☎ 020 8359 7606 ✉ ccm.support@barnet.gov.uk
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Alexandra West Senior Data and Systems Officer	CCM Support	✉ ccm.support@barnet.gov.uk
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Family Support and Early Intervention – Early Years Team

Sue Hillsden Early Years Services Manager	Performance measures and reporting support	☎ 020 8359 7614 ✉ sue.hillsden@barnet.gov.uk
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Marion Young Early Years Services Coordinator	Performance measures and reporting support	☎ 020 8359 7616 ✉ marion.young@barnet.gov.uk
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Annex C – CCM superusers

List correct as at 1 June 2014

Name	Centre	Email
Catherine O'Leary	Barnfield	oleary@barnfield.barnetmail.net
Amit Patel	Bell Lane	apatel163.302@lgflmail.org
Blaise McDonald	Bell Lane	bmcDonald@belllane.barnet.sch.uk
Sheelagh Sharp	Fairway	sheelaghsharp@fairwaycc.barnetmail.net
Jenny Holt	Hampden Way	jholt4.302@lgflmail.org
George Barnfather	Newstead	george.barnfather@barnet.gov.uk
Gosia Kidawska	Newstead	gosia.kidawska@barnet.gov.uk
Ewa Janowska-Clifton	Parkfield	ewa.janowska@barnet.gov.uk
Charu Makwana	Stonegrove	stonegrove@pre-school.org.uk
Asim Baig	Underhill	asim@underhillcc.barnetmail.net
Farah Khan	Wingfield	farah.khan@Barnet.gov.uk
Geeta Vekaria	St Margaret's	admin@st-margarets.barnetmail.net
Claire Bamford	Childs Hill	clairebamford@childshill.barnetmail.net
Sinead Brookes	Coppetts Wood	sbrooks@coppettswood.barnet.sch.uk

Annex D – Glossary

Term	Meaning
Accessing services	Individuals that have had significant contact, including on the phone, or have attended a session at a CC within the period of a year (for SEF purposes).
Activity register	The hard copy of the register for session attendance. It is filled out by adults accessing Children's Centre services.
Archived family	When details collected about a family are moved to the archive area of the database, so that historical information concerning attendances is retained. The information can be used in retrospective reports, but the family unit and the address are not visible when the database is used in its default, current settings.
Archiving	The practice of setting a flag on selected records for those individuals or families on CCM who are not expected to access centre services again. These records will remain inactive on the database and can be retrieved if needed.
Asylum seeker	Someone who says he or she is a refugee, but whose claim has not yet been definitively evaluated. ³
BME (Black and minority ethnic)	BME refers to individuals who cannot readily be identified with the exclusively white groups (i.e. White British, White Irish and White Other) recorded in the 2011 Census ⁴ For CCM, this means anyone who has not chosen 'White' or has chosen 'Refused' from the ethnicity codes on CCM.
CACI	CACI are the service providers for the CCM system. Issues that cannot be resolved by CCM Support will be raised with CACI.
CCM Support	The email support service for the CCM system. Its primary responsibility is to ensuring the CCM system is suitable for the needs of Children's Centres by adapting and creating processes to deal with changes in legislation.
CCM Support page	A page on the Barnet website that holds all CCM support documentation and information, including user guides.
CCM user group	A group of CCM users that meet on a termly basis to discuss and review the CCM system. The user group is a platform for users to share idea and solve problems.
Child	Anyone who has not yet reached their 18 th birthday.
Child in need (CiN)	Children in need are defined in law ⁵ as children who are aged

³ UN definition

⁴ There is no 'official' definition of BME. This is the GLE definition.

	<p>under 18 who:</p> <ul style="list-style-type: none"> • need local authority services to achieve or maintain a reasonable standard of health or development • need local authority services to prevent significant or further harm to health or development • have a disability <p>The local authority must keep a register of children with disabilities in its area but does not have to keep a register of all children in need.</p>
Childminding	A childminder is registered to look after one or more children under the age of eight to whom they are not related on domestic premises for reward and for a total of more than 2 hours in any day.
Child protection plan (CPP)	When a child protection case conference decides a child or young person is at risk of abuse, a protection plan is drawn up. The child is referred to as a 'child subject of a child protection plan'.
Children's Centre Data Pack	A community profile of the children's centre reach area. This includes health data, population figures, registration and accessing numbers.
Common Assessment Framework (CAF)	A process whereby practitioners such as health visitors, social workers and children's centre outreach workers, can identify a child's or young person's needs early, assess those needs holistically, deliver coordinated services and review progress.
Data processor	Data processor, in relation to personal data, means any person (other than an employee of the data controller) who processes the data on behalf of the data controller.
Data Protection Act 1998 (DPA)	The Data Protection Act 1998 is an act of the United Kingdom Parliament defining the ways in which information about living people may be legally used and handled. The main intent is to protect individuals against misuse or abuse of information about them.
Data subject	A living individual to whom personal data relates.
Data Systems and Assurance Team	The Data Systems and Assurance Team are responsible for the day-to-day management of CCM. The team provides a support service for users of the system.
Department for Education (DfE)	The Department for Education (DfE) is a <u>department of the UK government</u> responsible for issues affecting people in England up to the age of 19, including <u>child protection</u> and <u>education</u> .
Deprived LSOAs (Lower Super Output Areas)	All LSOAs in a reach that have an IMD score of 30% or less (see LSOA).

⁵ Adapted from section 17 of the Children Act 1989

Disability	<p>A physical or mental impairment that has a ‘substantial’ and ‘long-term’ negative effect on the individual’s ability to do normal daily activities.⁶</p> <p>For a child, ‘long-term’ should be understood in relation to the child’s age i.e. lasting for 1 year or longer.</p> <p>Disabilities include: multiple and complex health needs, sensory impairment such as hearing loss, visual impairment or deaf-blind; a significant learning disability; a physical disability, chronic physical illness, autism (Autistic Spectrum Disorder) and communication disorders, a significant developmental delay.</p>
Early childhood services	These include: early years provision; the social services functions of the local authority in relation to young children, parents and prospective parents; health services relating to young children, parents or prospective parents; provision of assistance to parents and prospective parents for training and employment; and information and assistance for parents and prospective parents. ⁷
Early Years Foundation Stage Profile (EYFSP)	This provides parents and carers, practitioners and teachers with a summary of a child’s knowledge, understanding and abilities, and an assessment of their progress against the early learning goals. It must be completed for all children in their final term in the Early Years Foundation Stage.
Early Years Provision	The provision of a combination of early learning, care and development for a young child.
Emerging group	A defined group of individuals who do not constitute a target group at present, but have an increasing presence in the reach area and may be a target group in the future.
Employed	An individual undertaking paid work.
English as an additional language (EAL)	A family or individual whose first or primary language is not English.
E-safety	In the context of an inspection, e-safety may be described as the centre’s ability to protect and educate children and staff in their use of technology.
ESOL	English for Speakers of Other Languages (ESOL) is an educational programme used to teach English to people whose first language is not English.
Family	Families are classed as those individuals who live at the same address on CCM. If individuals live at different addresses (even if they are related) they are classed as two separate families.

⁶ Equalities Act 2010 definition

⁷ OFSTED definition 2013

Formal childcare	Formal childcare is Ofsted-registered childcare, including day nurseries, out-of-school clubs, pre-school play groups and childminders.
Freedom of Information Act 2000	<p>The Freedom of Information Act 2000 provides public access to information held by public authorities.</p> <p>It does this in two ways:</p> <ul style="list-style-type: none"> • public authorities are obliged to publish certain information about activities • members of the public are entitled to request information from public authorities.
Gypsy, Roma and Traveller children⁸	<p>Since 2003 Gypsy/Roma and Travellers of Irish heritage are two distinct ethnicity group categories within the School Census. These two groups are defined as follows:</p> <p><u>Gypsy/Roma</u> – This category includes pupils who identify themselves as Gypsies and or Romanies, and or Travellers, and or Traditional Travellers, and or Romanichals, and or Romanichal Gypsies and or Welsh Gypsies/Kaale, and or Scottish Travellers/Gypsies, and or Roma. It includes all children of a Gypsy/Roma ethnic background, irrespective of whether they are nomadic, semi-nomadic or living in static accommodation.</p> <p><u>Traveller of Irish Heritage</u> – A range of terminology is also used in relation to Travellers with an Irish heritage. These are either ascribed and or self-ascribed and include: Minceir, Travellers, Travelling People, and Travellers of Irish heritage.</p> <p>The School Census categorisation does not include Fairground (Showman's) children; the children travelling with circuses; or the children of New Travellers or those dwelling on the waterways unless, of course, their ethnicity status is either of that which is mentioned above.</p>
Hard-to-reach	Groups, families or individuals who are inaccessible to most traditional and conventional methods for any reason.
Inactive person	<p>Someone who is not seeking work or is not available for work – unlike an unemployed person, who is seeking work.</p> <p>An inactive person could be a student, a discouraged worker, retired etc.</p>
Index of Multiple Deprivation (IMD) score	<p>The IMD was created by the British Department for Communities and Local Government (DCLG).</p> <p>The index is made up of seven distinct dimensions of deprivation</p>

⁸ Term from Ofsted 2014

called Domain Indices:

1. Income

The purpose of this is to capture the proportions of the population experiencing income deprivation in an area.

2. Employment

This measures employment deprivation by considering people of working age who are involuntarily excluded from the world of work, either through unemployment, ill health or family circumstances.

3. Health and disability

This Domain identifies areas with relatively high rates of people who die prematurely or whose quality of life is impaired by poor health or who are disabled, across the whole population.

4. Education, skills and training

The purpose of this is to capture the extent of deprivation in education, skills and training in a local area. The indicators fall into two sub-domains: one relating to lack of attainment among children and young people and one relating to lack of qualifications in terms of skills. These two sub-domains are designed to reflect the 'flow' and 'stock' of educational disadvantage within an area respectively. That is, the children/young people sub-domain measures the deprivation in the attaining of qualifications, while the skills sub-domain measures the deprivation in the resident working age adult population.

5. Barriers to housing and services

The purpose of this is to measure barriers to housing and key local services. The indicators fall into two sub-domains: 'geographical barriers' and 'wider barriers' which includes issues relating to access to housing such as affordability.

6. Living environment

This focuses on deprivation in the living environment. It comprises two sub-domains: the 'indoors' living environment which measures the quality of housing and the 'outdoors' living environment which contains two measures about air quality and road traffic accidents.

7. Crime

This measures the rate of recorded crime for four major crime themes – burglary, theft, criminal damage and violence - representing the occurrence of personal and material victimisation.

Each domain contains a number of indicators, totalling 37. Two supplementary indexes have been created as a subset of the

	<p>Income domain. These relate to income deprivation affecting children and income deprivation affecting older people.</p> <p>These are then combined into a single overall score.</p>
Income Deprivation Affecting Children Index (IDACI)	<p>The Income Deprivation Affecting Children Index (IDACI) is an index of deprivation used in the United Kingdom.</p> <p>The index is calculated by the Office of the Deputy Prime Minister and measures in a local area the proportion of children under the age of 16 that live in low income households. The local areas for which the index is calculated are super output areas. It is supplementary to the Indices of Multiple Deprivation and is used for calculation of the contextual value added score, measuring children's educational progress.</p> <p>In Barnet we use IMD scores rather than IDACI scores for Children's Centre LSOAs.</p>
Inequality	Inequality concerns variations in living standards across a whole population.
Informal Childcare	The following forms of childcare are defined as informal childcare: ex-husband/wife/partner (the child's non-resident parent), grandparent, the child's older brother/sister, another relative, a friend or neighbour.
Information Commissioner's Office (ICO)	The Information Commissioner's Office is the independent regulatory office dealing with the Data Protection Act 1998 and the Freedom of Information Act 2000 in the UK.
Information Sharing Agreement (ISA)	An ISA details the specific arrangements between organisations and departments that need to share information for a common purpose or project.
Integrated working	Integrated working is when everyone supporting children and young people works together for the child, meeting their needs and improving their life.
Known	Individuals and families whose names and addresses are known, and who receive targeted information and advice from Children's Centres.
Locality	<p>A geographical area that is usually a smaller unit than the local authority as a whole.</p> <p>In Barnet there are four localities: East, West, South and Central.</p>
Lone parent	A parent or carer with a dependent child aged 0-4 who is not in a co-habiting relationship.
Looked after children (LAC)	Children who are under 18 who are in the care of the local authority or provided with accommodation by the local authority.
Low Income	Having a household income that is less than 60% of the national

	median income that year. ⁹
Lower layer super output area (LSOA)	<p>Lower Layer SOAs were first built using 2001 Census data from groups of Output Areas (typically four to six) and have been updated following the 2011 Census. They have an average of roughly 1,500 residents and 650 households. Measures of proximity (to give a reasonably compact shape) and social homogeneity (to encourage areas of similar social background) are also included.</p> <p>There are 211 LSOAs in Barnet.</p>
Middle layer super output area (MSOA)	<p>As with the Lower Layer, Middle Layer SOAs are generated automatically by zone-design software using census data from groups of LSOAs. They have a minimum size of 5,000 residents and 3,000 households with an average population size of 7,500. They fit within local authority boundaries.</p>
MMR	<p>MMR is a combined vaccine that protects against three separate illnesses - measles, mumps and rubella (German measles) - in a single injection. The full course of MMR vaccination requires two doses: MMR1 and MMR2.</p>
New birth family	<p>These are families who have completed the form that is part of the new birth leaflet. These families are not registered at the centre, but their details can be stored on CCM.</p>
New birth leaflet	<p>The new birth leaflet is an information leaflet given to new mothers by health visitors. There is a form attached to the leaflet for the new mothers to complete to register their interest with the children's centre. This is how new birth data is collected.</p>
Ofsted	<p>Ofsted is the Office for Standards in Education, Children's Services and Skills. They report directly to Parliament and they are independent and impartial. They inspect and regulate services which care for children and young people, and those providing education and skills for learners of all ages.</p>
Ofsted Inspection Framework for children's centres	<p>This framework sets out the statutory basis for Sure Start Children's Centre inspections conducted from April 2013. It summarises the main features of children's centre inspections and describes how the general principles and processes of inspection are applied to single centres and children's centre groups.</p>
Parents	<p>Include fathers, mothers, carers and other adults with parental responsibility for looking after a child, and prospective parents.</p>

⁹ It is possible to define low-income with respect to several different thresholds, but the one most commonly adopted (e.g. in the DWP/HMT child poverty PSA target for 2004 and in the EU social indicators adopted by the Laeken Council) is 60% of median equivalised contemporary household income.

Performance Framework	<p>The performance framework relates to the targets set by the local authority for Children's Centres.</p> <p>These targets are split into six areas:</p> <ul style="list-style-type: none"> • Overall effectiveness targets • Accessing services targets • Quality and impact targets • Quality and impact – health targets • Management information • Leadership and governance targets
Personal data	<p>Data which relate to a living individual who can be identified</p> <ol style="list-style-type: none"> a) from those data, or b) from those data and other information which is in the possession of, or is likely to come into the possession of, the data controller, and includes any expression of opinion about the individual and any indication of the intentions of the data controller or any other person in respect of the individual.
Privacy policy	<p>A statement that discloses some or all of the ways the local authority and Children's Centres gather, use, disclose and manage a customer's data.</p>
Reach area	<p>The designated geographical area served by a Children's Centre. The reach area is often aligned with ward and parish boundaries, and may or may not be coterminous with local primary school and other service boundaries</p>
Refugee	<p>A refugee is someone who has been forced to flee his or her country because of persecution, war, or violence.</p>
Registration form	<p>The registration form contains information about each carer and child accessing Children's Centre services.</p>
Registered	<p>When an individual has filled out the Children's Centre registration form and the information has been uploaded to CCM.</p>
Safeguarding children	<p>The process of protecting children from abuse or neglect, preventing impairment of their health and development, and ensuring they are growing up in circumstances consistent with the provision of safe and effective care that enables children to have optimum life chances and enter adulthood successfully.¹⁰</p>
School readiness	<p>School readiness refers to how well prepared a child is to succeed when s/he starts school, and the extent to which s/he has acquired the skills, abilities and knowledge needed to make the most of the school curriculum.</p>
Self-evaluation form (SEF)	<p>A working document linked to the judgements that Ofsted make at inspection. Its purpose is to:</p> <ul style="list-style-type: none"> • help centres in their own self-evaluation • form a basis for the inspection of the children's centre.

Sensitive personal data	<p>Sensitive personal data means personal data consisting of information as to:</p> <ol style="list-style-type: none"> the racial or ethnic origin of the data subject their political opinions their religious beliefs or other beliefs of a similar nature whether they are a member of a trade union (within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992) their physical or mental health or condition their sexual life the commission or alleged commission by them of any offence, or any proceedings for any offence committed or alleged to have been committed by them, the disposal of such proceedings or the sentence of any court in such proceedings.
Special Educational Needs (SEN)	<p>Children with special educational needs (SENs) have learning difficulties or disabilities that make it more difficult for them to learn or access education than most children of the same age. These children may need extra or different help from that given to other children of the same age.</p> <p>They may have difficulties in thinking and understanding, physical or sensory difficulties, emotional and behavioural difficulties, difficulties with speech and language or how they relate to and behave with other people.</p> <p>Special education needs could mean a child has difficulties with:</p> <ul style="list-style-type: none"> all of the work in school reading, writing, number work or understanding information expressing themselves or understanding what others are saying making friends or relating to adults behaving properly in school organising themselves some kind of sensory or physical needs that may affect them in school.¹¹
Super output area (SOA)	<p>Super Output Areas are a geography for the collection and publication of small area statistics. They are used on the Neighbourhood Statistics site and across National Statistics.</p> <p>There are currently two layers of SOA, Lower Layer Super Output Area (LSOA) and Middle Layer Super Output Area (MSOA). The SOA layers form a hierarchy based on aggregations of Output Areas (OAs).</p> <p>The two layers of SOA, with areas intermediate in size between census Output Areas (OAs) and local authorities, each layer nesting inside the layer above. This offers a choice of scale for the collection and publication of data, and allows for the release of local data that could be disclosive if published for OAs.</p>

¹¹ DfE online glossary definition

	<p>SOAs give an improved basis for comparison across the country because the units are more similar in size of population than, for example, electoral wards. They are also intended to be stable, enabling the improved comparison and monitoring of policy over time. In addition, figures for user defined geographies are aggregated and best fitted from data held for OAs and SOAs.</p> <p>The Office for National Statistics maintains a series of codes to represent a wide range of geographical areas of the UK, for use in tabulating census and other statistical data. They combine a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each small area in England (see IMD score).</p>
Superuser	The Centre Manager and a designated user/member of staff within the Children's Centre who have additional levels of access to the CCM database.
System access request form	The form that is used to request CCM access for new users.
System downtime	Periods when the CCM system is unavailable.
Targeted families	Group or families the centre identifies as having needs or circumstances that require particularly perceptive intervention and/or additional support. The target group(s) will vary according to the centre's identification of its community and their needs ¹²
Target group	<p>The groups and families the centre identifies as having needs or circumstances that require particularly perceptive intervention and/or additional support. The following list is not exhaustive and does not imply that young children or families in any of these categories require additional support. The target groups will vary according to the centre's identification of its community and their needs but in any particular centre may include:</p> <ul style="list-style-type: none"> • children from low income backgrounds • children living with domestic abuse, adult mental health issues and substance abuse • children 'in need' or with a child protection plan • children of offenders and/or those in custody • fathers, particularly those with any other identified need, for example, teenage fathers and those in custody • those with protected characteristics, as defined by the Equality Act 2010 • children who are in the care of the local authority (looked after children) • children who are being cared for by members of their extended family such as a grandparent, aunt or older sibling • families identified by the local authority as 'troubled families' who have children under five

¹² Ofsted handbook

	<ul style="list-style-type: none"> families who move into and out of the area relatively quickly (transient families), such as asylum seekers, armed forces personnel and those who move into the area seeking employment or taking up seasonal work any other vulnerable groups or individual families including those young children and families identified as at risk of harm by other services – such as adult social care, schools, police, and health services.¹³
Teenage parent	A parent under the age of 18.
Teenage pregnancy	Teenage pregnancy is defined as a teenage girl, usually within the ages of 13-19, becoming pregnant.
Tracking	The actions and strategies that leaders and managers employ to monitor the effectiveness and impact of a centre's work. For example this may include using local data/compiling centre data that identifies the number of families living in the local area, using the centre, attendance at activities and follow up monitoring of children and adults to determine whether there has been any longer term impact of their engagement with the centre.
Unemployed individual	<i>Somebody not employed but looking and available to work and claiming income support/universal credit, JSA or ESA.</i>
Universal services (also known as Tier 1)	Services available to all families who wish to use them in an area.
Vulnerable child	<p>Vulnerable children are those whose needs, dispositions, aptitudes or circumstances put them at risk of not reaching their potential and achieving their outcomes. Such children may include;</p> <ul style="list-style-type: none"> disabled pupils, as defined by the Equality Act 2010, and those who have special educational needs boys girls pupils for whom English is an additional language minority ethnic pupils Gypsy, Roma and Traveller children looked after children children from low income backgrounds Children in need Children subject to a child protection plan other vulnerable groups
Vulnerable families	Vulnerable families include those with low incomes, young parent families, sole parent families, families from culturally and linguistically diverse communities, families with a parent who has a disability, and families experiencing problems with housing, domestic violence, substance abuse, mental health or child protection can be particularly vulnerable. Vulnerability can be

¹³ Ofsted definition 2013

	<p>transient, depending on the needs of the individual or family.¹⁴</p> <p>They include children who are on a child protection plan (CPP), child in need (CiN), have a disability or special educational needs (SEN) or are looked after (LAC).</p> <p><i>***Include children who are CP, CiN, SEN or LAC***</i></p>
Ward	<p>A ward is a subdivision of a local authority area, typically used for electoral purposes.</p> <p>There are 21 wards in Barnet.</p>
Well-being (Childhood)	<p>There is some emerging consensus that childhood wellbeing is multi-dimensional, should include dimensions of physical, emotional and social wellbeing; should focus on the immediate lives of children but also consider their future lives; and should incorporate some subjective as well as objective measures.</p>
Wider community	<p>Refers to all families in the reach area, including those who may not use the centre or benefit from its services.</p>
Worker: full-time worker	<p>An employee working more than 30 paid hours per week (or 25 or more for the teaching professions).</p>
Worker: part-time	<p>An employee working fewer than 30 paid hours per week (or fewer than 25 for the teaching professions).</p>
Workless household	<p>A household where both parents/carers are unemployed & in receipt of income support/universal credit, JSA or ESA and/or disability allowance.</p>
Young children	<p>Children aged under five years.</p>
Young parent	<p>A parent under the age of 21.</p>

¹⁴ A generally acknowledged definition taken from the University of Glasgow report- "[Why should Families Be a Concern For Deep End General Practices?](#)"

Children's Centre Management Information System; CCM

Basic Guide to CCM

Document history

Version	Date	Owner	Position	Comments
1.0.	April 2013	Lauren Burbidge	Data Quality Officer	Upgrade to CCM
2.0.	April 2014	Lauren Burbidge	Data Quality Officer	Rewrite: Update to 2.2.9

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Section 1: Getting started

1. Introduction

The basic user guide is aimed at hands-on first time users of CCM that will be inputting data to the system.

This guide is to be used in conjunction with the CCM online help.

Table 1 gives details of additional CCM guidance documents that are available.

Table 1: CCM Guidance documents

Document name	Audience
CCM guide to performance reporting	<ul style="list-style-type: none"> Children's Centre management team CCM Superusers
CCM guide to recording Casework	<ul style="list-style-type: none"> Children's Centre management team Family Support Workers CCM Superusers

This guide details the facilities that are currently available (version 2.2.9).

Access to everything described in this guide is dependent upon the permissions for your user profile being set at a high enough level to 'see' all areas. If your user profile does not allow you to carry out some of the tasks described, you will need to contact ccm.support@barnet.gov.uk.

2. General information

Families

Families are classed as those individuals who live at an address in the database. If somebody was to live at a different address (even if they were related) then this would be classed as two separate families.

Maximising screen space

To maximise the amount of screen space available, CACI recommends that users press the F11 key when using Internet Explorer.

Internet Explorer

Internet Explorer version 8 in Compatibility View is recommended for CCM.

3. Logging on for the first time

Access to the Children Centre Manager database is through your internet browser.

The web address for CCM is: <https://barnetccm.org.uk/ccmweblive>

Please note: The recommended browser is Internet Explorer 8

Once you have connected to the database, you will need to sign on using the username and password given to you by CCM Support.

You should see a log on screen similar to that shown below:

The image shows a web-based login interface for the Children's Centre Manager (CCM). At the top, there is a header bar with the text "CCM Login" on the left and "v2.2.8" on the right. Below the header, there are two input fields: "USERNAME" and "PASSWORD". To the right of each label is a white rectangular input box. Below the password field, there are two buttons: "Login" and "Change Password". At the bottom left of the login box, the "ChildView" logo is displayed. The entire login box has a light blue border and a subtle shadow.

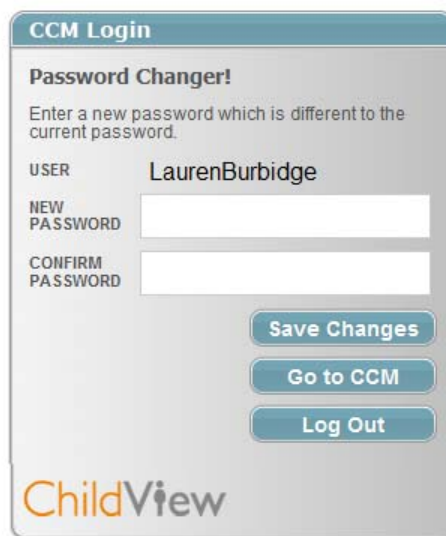
Welcome

To login you must have a valid username and password
for the Children's Centre Manager application.
Please contact your system administrator if you do not have this.

EMAIL: essupport@caci.co.uk

2.1 Changing your password

1. Click in the username field and type in the username provided by CCM Support. The field is case insensitive.
2. Click in the password field and type in the password provided by CCM Support.
3. Click the change password button.
4. You should see a log on screen similar to that shown below



The screenshot shows a web form titled "CCM Login" with a sub-header "Password Changer!". Below the sub-header is a instruction: "Enter a new password which is different to the current password." The form contains three input fields: "USER" with the text "LaurenBurbidge", "NEW PASSWORD", and "CONFIRM PASSWORD". To the right of these fields are three buttons: "Save Changes", "Go to CCM", and "Log Out". At the bottom of the form is the "ChildView" logo.

Welcome

To login you must have a valid username and password
for the Children's Centre Manager application.
Please contact your system administrator if you do not have this.
EMAIL: essupport@caci.co.uk

5. Type in your new password in the new password field and repeat in the confirm password field.
6. Click the save changes button.

Note: For security purposes you should change your password the first time that you log in.

Once you have changed your password you can log in to the system by clicking the login button.

4. Home page

The home page has five sections:

- Messages
- Birthdays
- Cases
- Sessions
- Families

4.1. Messages

In Barnet we are not currently using the messaging functionality, but will start using this in summer 2014.

4.2. Birthdays

The birthdays section of the home page lists individuals whose birthday is today.

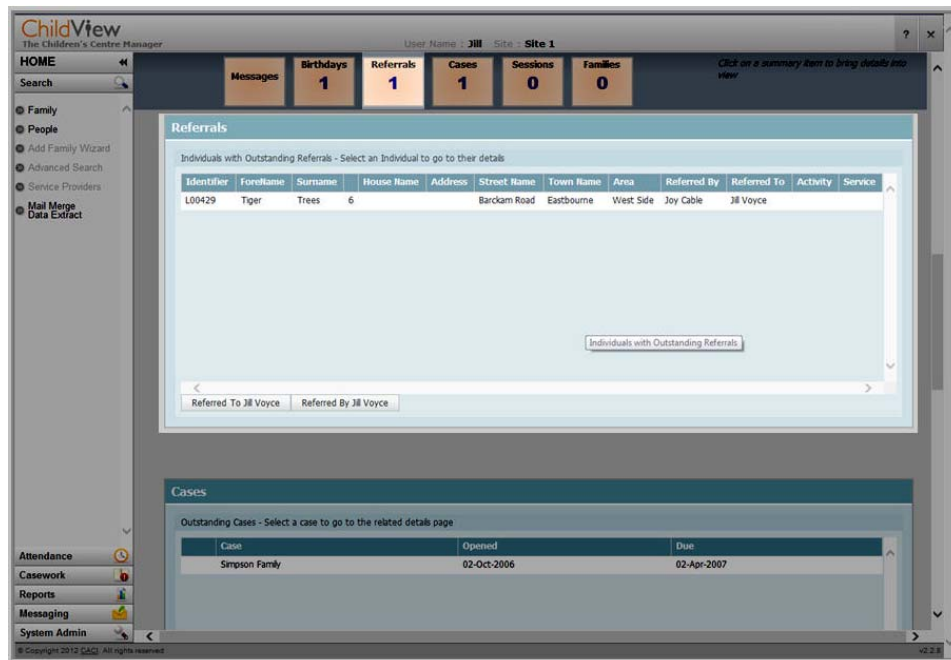
Click on a row to open the Individual Full Details screen.

The screenshot shows the ChildView Management Console interface. At the top, the user is logged in as 'SysAdmin' on the 'Management Console' site. The main navigation bar includes tabs for Messages, Birthdays, Referrals, Cases, Sessions, and Families. The Birthdays tab is active, showing a count of 1. Below this, a table lists individuals whose birthday is today. The table has columns for Identifier, Name, Surname, Age, Address, and DOB. One individual is listed: HUG0113, George Hughes, 37, 55 Barnside Field Eastbourne BC3 6DF (East Side), 19-12-1976. Below the table, there is a section for Referrals, which currently shows no results.

Identifier	Name	Surname	Age	Address	DOB
HUG0113	George	Hughes	37	55 Barnside Field Eastbourne BC3 6DF (East Side)	19-12-1976

4.3. Referrals

The referrals section of the home page lists individuals who have an open referral to a key worker, an activity or a service.



The screenshot shows the 'Referrals' section of the ChildView interface. At the top, there are summary cards for Messages (1), Birthdays (1), Referrals (1), Cases (1), Sessions (0), and Families (0). The main content area is titled 'Referrals' and includes a sub-header 'Individuals with Outstanding Referrals - Select an Individual to go to their details'. Below this is a table with the following data:

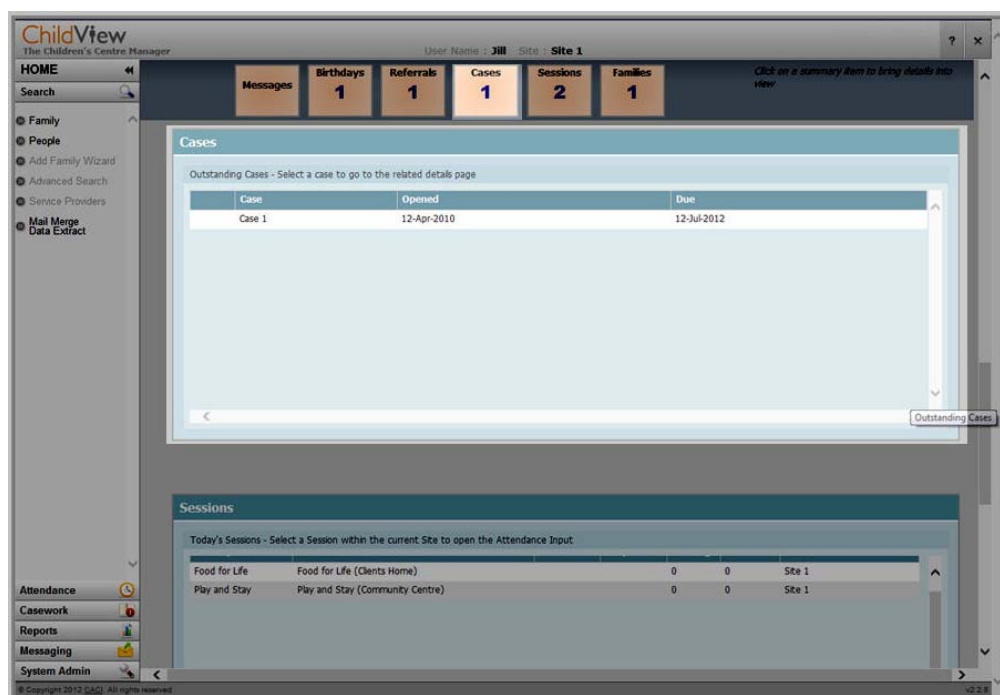
Identifier	ForeName	Surname	House Name	Address	Street Name	Town Name	Area	Referred By	Referred To	Activity	Service
L00429	Tiger	Trees	6		Barclay Road	Eastbourne	West Side	Joy Cable	Jill Voyce		

Below the table, there are filters for 'Referred To Jill Voyce' and 'Referred By Jill Voyce'. The bottom section of the screenshot shows the 'Cases' section with a table of outstanding cases:

Case	Opened	Due
Simpson Family	02-Oct-2006	02-Apr-2007

4.4. Cases

The cases section of the home page lists open cases within the current site. When the logged in user is linked to a key worker record the list is restricted to cases which involve the key worker.



The screenshot shows the 'Cases' section of the ChildView interface. At the top, there are summary cards for Messages (1), Birthdays (1), Referrals (1), Cases (1), Sessions (2), and Families (1). The main content area is titled 'Cases' and includes a sub-header 'Outstanding Cases - Select a case to go to the related details page'. Below this is a table with the following data:

Case	Opened	Due
Case 1	12-Apr-2010	12-Jul-2012

Below the table, there is a filter for 'Outstanding Cases'. The bottom section of the screenshot shows the 'Sessions' section with a table of today's sessions:

Session Name	Location	0	0	Site 1
Food for Life	Food for Life (Clients Home)	0	0	Site 1
Play and Stay	Play and Stay (Community Centre)	0	0	Site 1

4.5. Sessions

The sessions section of the home page lists sessions scheduled for today within the current site or all sites depending on the users permissions.

ChildView
The Children's Centre Manager

User Name: JIM Site: Site 1

Navigation: Messages | Birthdays 1 | Referrals 1 | Cases 1 | **Sessions 2** | Families 0

Click on a summary item to bring details into view

Sessions

Today's Sessions - Select a Session within the current Site to open the Attendance Input

Activity	Session Name	Start Time	Stop Time	Bookings	Attendees	Site
Food for Life	Food for Life (Clents Home)			0	0	Site 1
Play and Stay	Play and Stay (Community Centre)			0	0	Site 1

Sessions today

All KeyWorkers

My Supported Families

Individuals List Related Individuals List Related Individuals Past Relationships: ☐

No results found. Enter new criteria.

Attendance Casework Reports Messaging System Admin

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4.6. Families

When the logged in user is linked to a Key Worker record, the number of families currently supported by the Key Worker will be displayed.

ChildView
The Children's Centre Manager

User Name: JIM Site: Site 1

Navigation: Messages | Birthdays 1 | Referrals 1 | Cases 1 | Sessions 2 | **Families 1**

Click on a summary item to bring details into view

All KeyWorkers

My Supported Families

Individuals List Related Individuals List Related Individuals Past Relationships: ☐

Identifier	Name	Surname	Age	Address	DOB	Start Date	End Date	Profession
T00441	Ryan	Taylor	21	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	15-07-1992	19-12-2013		Carer
T00442	Jenna	Taylor	21	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	15-07-1992	19-12-2013		Carer
W00486	Fleur	Weller	8	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	10-11-2005	19-12-2013		Carer
W00440	Alison	Weller	42	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	11-03-1971	19-12-2013		Carer
WEL0043	Adam	Weller	46	35 Wilton Avenue Eastbourne BN14 6UH (West Side)	07-04-1967	19-12-2013		Carer

Attendance Casework Reports Messaging System Admin

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Section 2: Search menu

1. Searching

Before loading any data into CCM, search for **ALL** family members.

Do not assume that if the parent/carer is not on the system that the child will not be.

The system will host 'archived families' who previously registered with the centre but are no longer accessing services. To avoid creating duplicate families in the database it is important that all centres search both active and archived families before entering data into the system.

There are two different searches that can be performed:

1. Family search
2. People search

You will find these options listed in the search menu at the top left of the screen.

The search menu contains the starting point for finding families/ people and for adding families / people in to the database.

For day-to-day use of the database, it is likely to be the area that you use the most.

Please refer to the searching protocols detailed in section 4 of the CCM Data Guidance.

2. Family Search

Selecting the family menu option allows you to undertake a search to return a list of addresses. You can then modify information about the selected address / view individuals as required.

In the first instance just click the 'Search' button located towards the top right of the screen:

Family Search

The **Family Search** page can be used to find Families and Individuals by their name or address.

To find an Individual by their name, select **Name** in the **Search For** drop-down above. To find an Individual or Family by Address, ensure the **Search For** drop-down has **Address** selected. With the relevant permissions further criteria can be performed, limiting the Addresses returned by the **Site** currently being accessed and whether the Addresses are **Archived** or **Occupied**.

After a Search has been performed the results can be reduced further by using **Column filtering**. Column filtering occurs automatically once the page identifies you have made a change.

The **Address**, **Town**, **Post Code** and **Area** columns allow you to filter the results by supplying information in the Text Boxes just below the Column Header. The **Town**, **Post Code** and **Area** columns also allow you to filter the results by the common values found in the search. Simply click the down arrow in the Column's title.

Results can be sorted by clicking on the Title text of any column.

Remember: Always set the 'occupied', 'archived' and 'sites' drop-downs to 'all' so that archived individuals are returned in your search.

If the individual or addresses you are searching for is in the database, you should now see a grid of addresses shown on the screen:

	Address	Town	Post Code	Area
NIC	Cold Comfort Farm Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
	1 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
N	123 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
N	15 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
N	3 Anyroad, Eastbourne, BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart

Page 1 of 20 (97 items)

Please refer to Section 2: Search Menu, section 5 about 'Add family wizard' If the address or individual is not returned in the search.

Clicking on one of the addresses will then show you a grid containing all the people who are registered to be living at that address:

The screenshot shows the ChildView software interface. The top bar indicates the user is 'SysAdmin' at 'Site 1'. The left sidebar contains navigation options: HOME, Search, Family, People, Add Family Wizard, Advanced Search, Service Providers, Mail Merge, and Data Extract. The main area is titled 'Search for a Family' and displays a table of search results. Below this, a section titled '2 found' shows a list of people found at a specific address.

Address	Town	Post Code	Area
Cold Comfort Farm Anyroad,Eastbourne,BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
1 Anyroad,Eastbourne,BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
123 Anyroad,Eastbourne,BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
15 Anyroad,Eastbourne,BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart
3 Anyroad,Eastbourne,BC3 6DF, (Outside SureStart)	Eastbourne	BC3 6DF	Outside SureStart

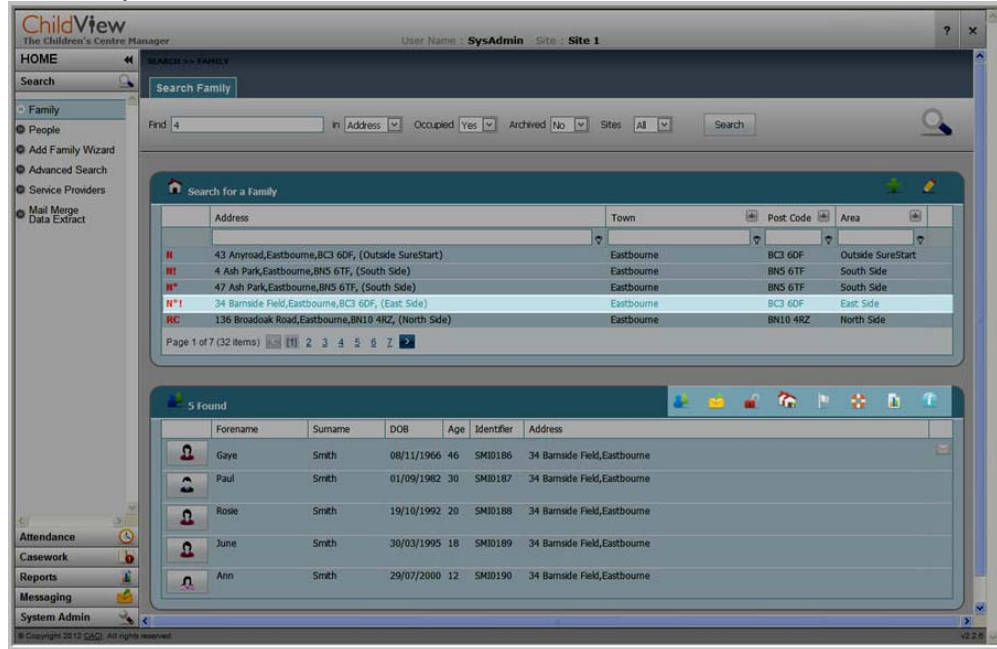
Page 1 of 20 (97 items)

Forename	Surname	DOB	Age	Identifier	Address
Doris	Howe	10/01/1974	39	HOW0176	3 Anyroad,Eastbourne
Mary	Howe	05/05/2005	8	H00457	3 Anyroad,Eastbourne

Clicking on one of the people icons to the left of the forename column will then launch that person's individual full details screen where you can view or edit their details as needed.


2.1 Address based operations

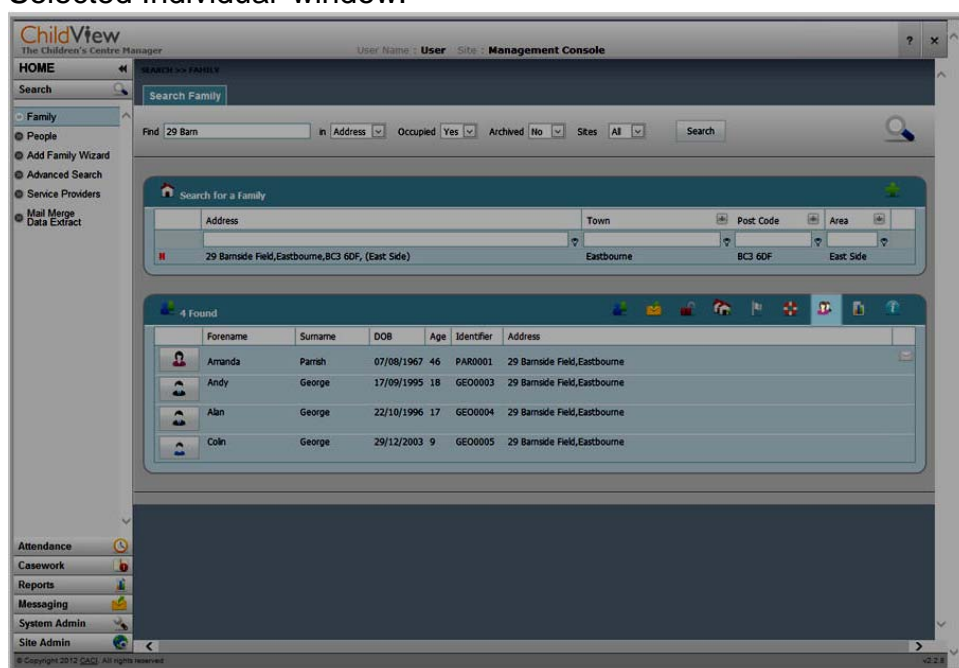
Once an address has been selected then those individuals registered at that address will be shown in a separate result grid at the bottom of the screen. At the top of this grid are a number of icons that allow you to undertake address based operations:




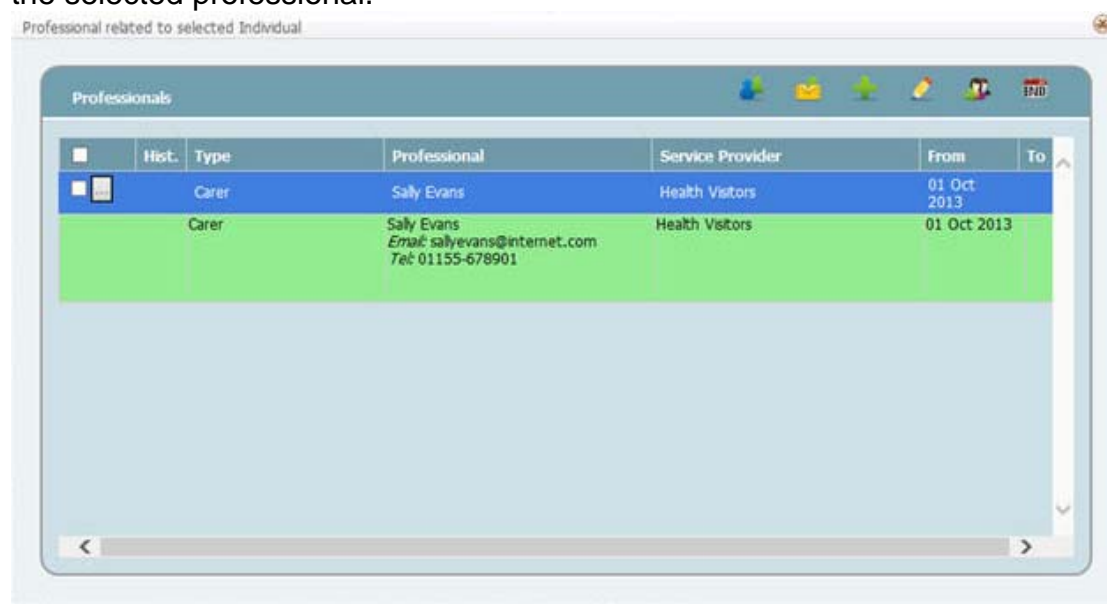
2.1.2. Maintain professionals involved

Family Search includes the functionality to maintain professional relationships for all individuals within the selected address. Click the individual row to select

an individual, then click the  icon to open the 'Professionals Related to Selected Individual' window.



The 'Professional Related to selected Individual' window will list any existing professional relationships. Clicking the  icon will display more details for the selected professional.



Professional relationships could include the following:

- Family Support Worker
- Midwife
- GP
- Health Visitor
- Social Worker
- School



Click to add a new professional relationship.



Click to edit an existing professional relationship (option only available when a row is selected).



Click to Add and Replace an existing professional relationship (option only available when a row is selected).



Click to end an existing professional relationship (option only available when a row is selected).

Colour Codes used in the 'Professional Related to Selected Individual' window.

Blue - The row is selected

Grey - indicates historic information

White - The relationship is current


Yellow - indicates a relationship which has ended and with no replacement professional.


Green - Indicates further level of detail for the preceding row.

Please refer to Section 2: Search menu, section 6.6 on adding/editing professional relationships.

2.1.3. Archiving / Unarchiving addresses

If none of the family members is currently relevant to your database (for example, if there are no children within the required age range), you can Archive the family. This means the address and its occupiers will be moved to the Archive area of the database. This ensures all the historical information concerning attendances is still held in the database. That information will still be used in retrospective reports, but the family unit and the address are no longer visible when you use the database in its default, current settings.

To archive a family, click on the open padlock icon () shown in the people grid. Note: Any archived addresses will have a red 'A' located to the right of the address details in the address search result grid.

Click the closed padlock icon () if you need to reinstate the family in the active, current view of the database (for example if the family has had a new baby).


Further information about this subject can be found in Section 5: Archiving.

2.1.4. Move address



icon.

When you press this icon, you'll be asked to confirm that you proceed with an

Address Move. Pressing the asterisk icon () will return you to the search screen.

Pressing Ok will present you with a screen similar to the following that allows you to move family members from one address to another.

Please refer to Section 2: Search Menu, section 3 on moving a family address.

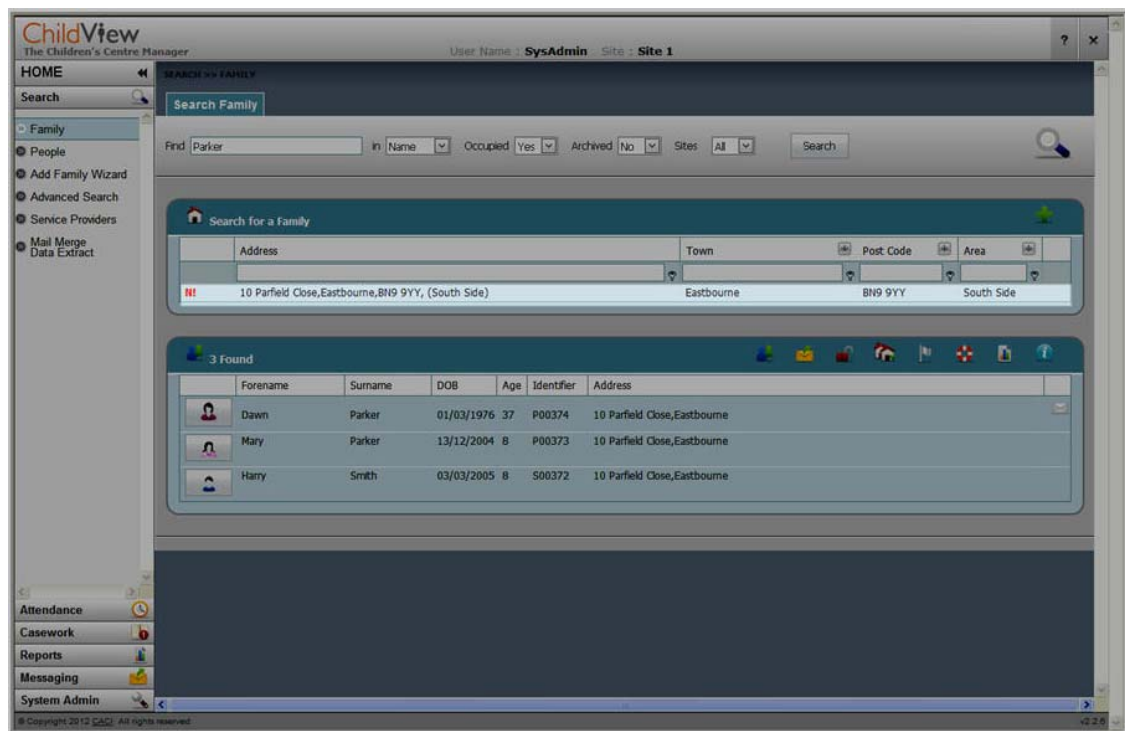
2.1.5. Family indicators



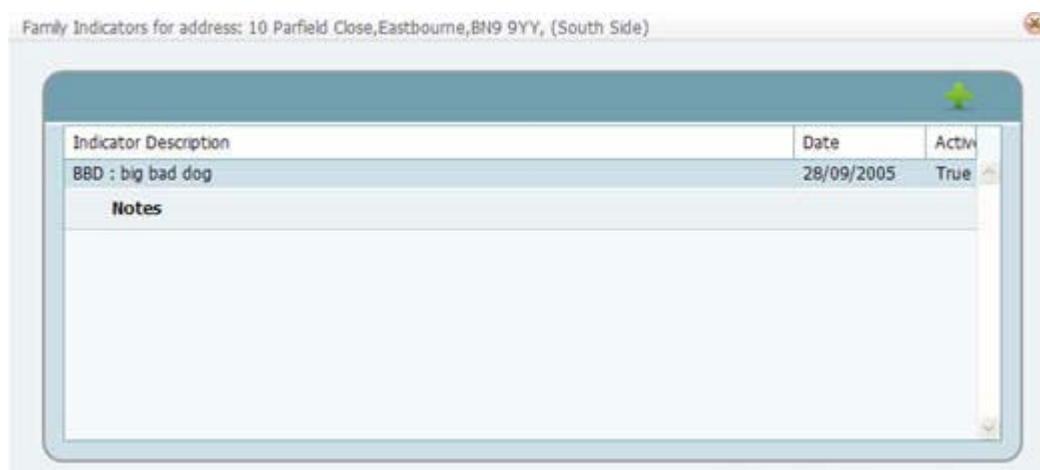
icon.

The Indicators are an alert, especially to Family Support Outreach Workers, who may visit clients at their homes.

When you use the Family search screen any addresses returned that have an indicator will have a ! status indicator against them. For example:



To see the indicators associated with the family press the Family Indicators icon that will be located in the grid showing individuals who live at the selected address. A screen similar to the following will show:



From the Family Indicator screen you can create new indicators or edit existing indicators that are applicable to the whole family.

Adding a new family indicator

To add a new indicator click on the  icon to open the Add new Family Indicator screen:



Select the applicable indicator description from the drop down list. If required you can now add an additional note or change the status of the indicator by ticking or un-ticking the active check box.

The following family indicators can be added to a family record:

*TF: Troubled Family	V: History of violence
AD: Aggressive dog	RTN: Refer to notes
VP: Visit in pairs	TFR: Top floor residence, no lift
DP: Dangerous/large pet	TR: Translator required
D: Deaf – unable to use voice telephone	*PP: Parent/carer in custody
OS: Family has received outreach services	*DV: History of domestic violence
	SF: Known to Safer Families
*DA: History of drug/alcohol abuse in the home	SC: Known to Social Care

*these family indicators link to performance targets and reports.

Click the 'Save' button to commit any change to the database.



Click the icon at the top of the screen to return to the Family or People Search screen.

Modifying an existing Family Indicator

If you need to modify an existing Family Indicator click on the relevant row in the Family Indicators screen to highlight it. The edit icon will now be visible on the screen:



Clicking this icon will open a dialog box where you can change the note details or tick / un-tick the active status check box.

Click the 'Save' button to commit any change to the database.



Click the icon at the top of the screen to return to the Family or People Search screen.

2.1.6. Support workers



icon.

This function has now been superseded by professional involvements.

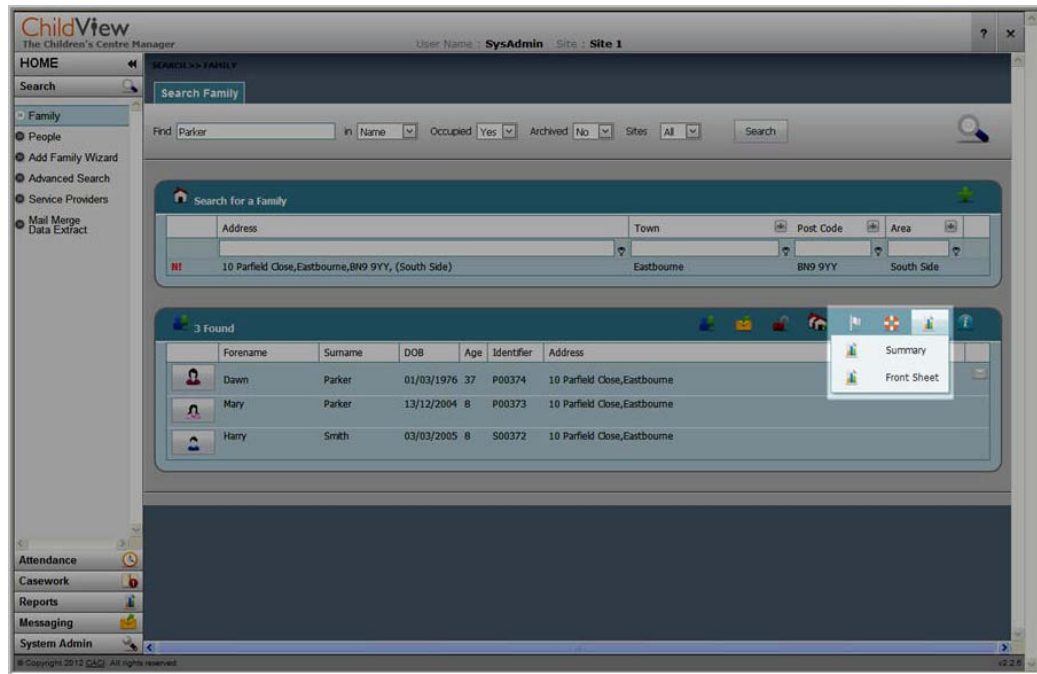
Please refer to section 3.1.1 Maintain professionals involved.

2.1.7. Family reports



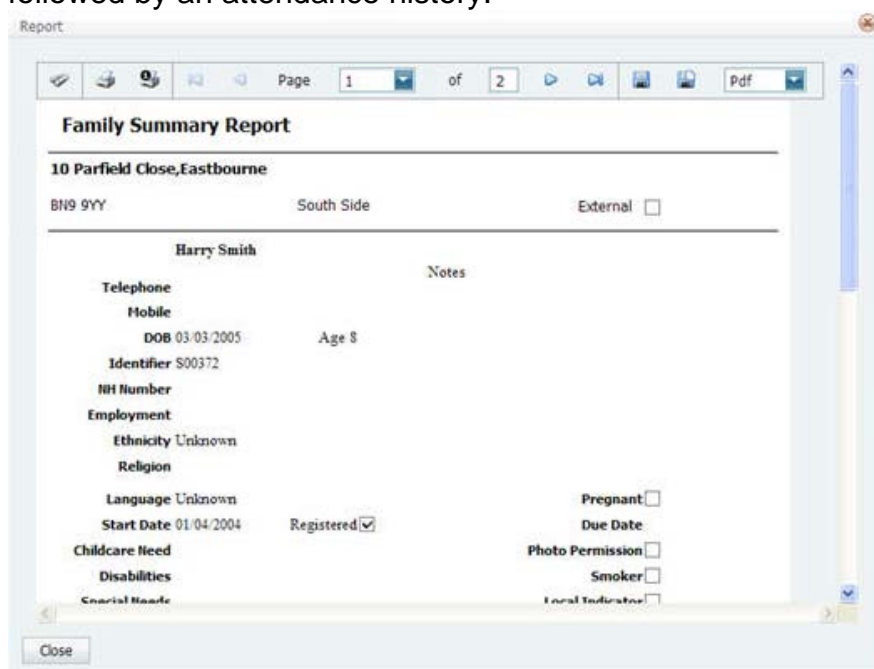
icon. New print

Hovering over this icon will cause a pop up menu to appear that contains two entries:



Summary report

This report prints a detailed snapshot of each individual's settings and notes followed by an attendance history.



Front Sheet

This report is a simple one line per person in the family and is designed as a front page for a family information folder.

Family Record Front Sheet Report

10 Parfield Close, Eastbourne
BN9 9YY

South Side External ☐

Identifier	Name	Telephone	DOB	Age	Parent	Pregnant	Registered
S00372	Harry Smith		03/03/2005	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00373	Mary Parker		13/12/2004	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00374	Dawn Parker		01/03/1976	37	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTES:

Close

Outputting reports

There are various output options available which enable you to save or print a report, as illustrated below.

Search **Print** **Print Current** **Save** **Open** **Format**

Family Record Front Sheet Report

10 Parfield Close, Eastbourne
BN9 9YY

South Side External ☐

Identifier	Name	Telephone	DOB	Age	Parent	Pregnant	Registered
S00372	Harry Smith		03/03/2005	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00373	Mary Parker		13/12/2004	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
P00374	Dawn Parker		01/03/1976	37	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTES:

Close

2.1.8. Family referrals



icon.

Click on this icon to see a list of referral cases in respect of all individuals registered to the selected address.

Referrals

Referrals for all at: 67 Ash Park, Eastbourne, BN5 6TF, (South...

#	Date	Who	Referred To	Referred By
<input type="checkbox"/>	03/09/2012	Mary Harris	Music Classes	Mary Peters
Notes Referred Mary to the Music Class as she appears to be musically gifted. 04/09/2012 - Mary says she wants to be a drummer.				
	03/09/2012	Reg Harris	Singing Lessons	Gwenda Maughan
Notes Reg has asked if he can have singing lessons. Outcome 05/09/2012 - Gwenda Maughan 05/09/2012 - Reg attended a singing lesson. Decided he didn't like it.				

From the Referrals screen, you can edit referrals or allocate outcomes in respect of them. For more information about referrals, please see section xx adding referrals.

3. Moving a family address

1. Search for family



2. Click the move icon

When you press this icon, you'll be asked to confirm that you proceed with an Address Move.

3. Pressing Ok will present you with a screen similar to the following that allows you to move family members from one address to another.

4. Search for the address that you would like to move the family to.

5. The Family who are moving will be listed under their current address on the left-hand side of the move family address screen. If all the

people are moving together to the same new address, click the '>>' button in the centre of the screen. The names of all the people will move to the 'People to move' box (see the picture below). If some, but not all, of the family are moving, click on each person who is moving and, after each click, click on the '>' button instead. You will be moving each family member to the 'People to move box' individually. In the example shown below, no-one is living at the address the family is moving to (hence the 'Destination family members' box (bottom right) is empty), and the destination address (111 Parfield Close) has already been set-up on the database.

6. Once you have moved the appropriate names into the People to move box, click the 'Accept Move' button.

4. People search

Click on the 'search' menu item on the left hand side and then click the 'people' option. This will allow you to search for individuals (records) in the database and will present you with the following screen:

To quickly see a list of names, click in the name field, type part of the name you are looking for, then click the 'search' button. Your list of results will appear in the main part of the screen, similar to this:

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

Search People

Name: [Smith] Telephone: [] Identifier: [] DOB: [] equal to: []

Address: [] Mobile: [] NHS number: []

Notes: Individuals [] Search type: All [] Search text: []

Archived: No [] All Sites: Yes [] Registered: All [] Indicator: All []

Barcode: []

Search

People: 15 (100 max) of 15

Forename	Middle Name	Surname	Known As	Address	DOB	Age	Identifier	Start Date	Area
Ann		Smith		34 Ramside Field, Eastbourne, BC3 6DF, (East Side)	29/07/2000	12	SM00190	01/02/2001	East
Extended/Confidential Note Count: 0 - Notes:									
Chris		Smith		11 Duck Park, Eastbourne, BB2 5RF, (West Side)	13/02/1970	43	SM00057	12/12/2000	West
Extended/Confidential Note Count: 0 - Notes:									
Dean		Smith		11 Duck Park, Eastbourne, BB2 5RF, (West Side)	08/03/1995	18	SM00059	12/12/2000	West
Extended/Confidential Note Count: 0 - Notes:									
Gaye		Smith		34 Ramside Field, Eastbourne, BC3 6DF, (East Side)	08/11/1966	46	SM00186	01/02/2001	East
Extended/Confidential Note Count: 0 - Notes:									
Harry		Smith		10 Parfield Close, Eastbourne, BN9 9TY, (South Side)	03/03/2005	8	S00372	01/04/2004	South
Extended/Confidential Note Count: 0 - Notes:									

Page 1 of 3 (15 items)

1.1. Searching options

The panel at the top of this screen allows you to specify the search criteria for finding people in the database:

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

Search People

Name: [] Telephone: [] Identifier: [] DOB: [] equal to: []

Address: [] Mobile: [] NHS number: []

Notes: Individuals [] Search type: All [] Search text: []

Archived: No [] All Sites: Yes [] Registered: All [] Indicator: All []

Barcode: []

Search

People

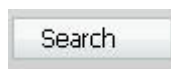
No Current Individuals

Reset criteria icon



Click on this icon to remove all the filters that are currently set in the search boxes, and reset any drop downs to their default entries.

Search button



Click this each time you change one of the filtering option. Alternatively press the Enter key on your keyboard.

1.1. Returned individuals

The search results are limited to 100 records when displayed on the screen and if this happens you may need to be more specific with your search criteria.

It is possible to tell the total amount of records available by looking at the text shown at the top of the individual result grid. The following image illustrates that we can only view 100 records out of a total of 307 records available:

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Site 1

HOME

Search

Search People

Name % Telephone Identifier DOB equal to

Address Mobile NHS number

Notes All Search type Search text

Archived No All Sites Yes Registered All Indicator All

Barcode

Search

People : 100 (100 max) of 310

Forename	Middle Name	Surname	Known As	Address	DOB	Age	Identifier	Start Date	Area
?	?	?		Unknown, Unkown, (Unknown)			000498	13/12/2007	Unkr
Extended/Confidential Note Count : 0 - Notes :									
Adam		Bryant		9 Duck Park, Eastbourne, B82 5RF, (West Side)	08/02/1989	24	BRY0063	12/12/2000	West
Extended/Confidential Note Count : 0 - Notes :									
Adam		Weller		35 Wilton Avenue, Eastbourne, BN14 6UH, (West Side)	07/04/1967	46	WEL0043	01/03/2002	West
Extended/Confidential Note Count : 0 - Notes :									
Alan		George		29 Barnside Field, Eastbourne, BC3 6DF, (East Side)	22/10/1996	16	GEO0004	01/07/2000	East
Extended/Confidential Note Count : 0 - Notes : Not interested in services									
Alan		Gordon		4 Pheasant Court, Eastbourne, BN8 9UU, (East Side)	24/05/2003	10	GOR0119	25/06/2003	East
Extended/Confidential Note Count : 0 - Notes :									

Attendance

Casework

Reports

Messaging

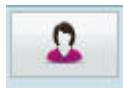
System Admin

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v2.2.6

1.1.4 Individual icons

Each individual in the search results will be represented by an icon that will vary according to their status:



= a female adult.



= a male adult.



= a female child.



= a male child.



= unknown gender.

1.1.4 Viewing an individual's full details

Clicking one of the people icons will launch their Individual Full Details screen.

See section 4 individual full details for further information.

1.1.4. Status Indicators

If an individual is the subject of a Referral or an Open Case an R or C indicator will be displayed below the individual icon. Clicking on the C status code will open the associated Case record.

Important Note – The Open Case indicator will only be displayed if the case is assigned to the current site.

1.1. Individual based operations

Once a search has been undertaken you will be presented with a grid of individuals who meet your search criteria. At the top of this result grid are a number of icons that allow you to undertake a range of different operations and the exact icons shown will depend upon your user rights and the number of individuals selected.


Note: The individual selections made are only relevant to the page of results that are currently being viewed. Any selection made on other pages will have been lost when you navigated away from that screen.

1.1.4 Field chooser



Clicking the 'Field Chooser' icon opens a box showing the additional fields that can be viewed in the search results:

Tick the fields you want to include and un-tick the fields you don't want. Once

you have made your selection click the  icon located at the top right of the box to return to the people search screen.

The search grid will update accordingly.

Note: Any changes made to the layout of the search results will be lost when you navigate away from the People Search page.

1.1.4. Exporting results



icon.

Once you have undertaken a search it is possible to export the search results to a .csv file by clicking on this icon shown above. The contents of the .csv file will match the columns shown on screen.

1.1.4. Delete individual



icon.

If you require an individual to be deleted from the database you should contact CCM Support.

1.1.4. Merge duplicates



icon.

If you click this icon, you will see a tool for merging duplicate records.

Please note: only CCM superusers and CCM Support have permission to merge duplicate records. If you require a duplicate record to be merged, contact your local superuser.

1. Add Family Wizard

The Add Family Wizard gives the user the ability to quickly add new individuals into addresses that already exist in the system.

If address does not exist on the system, you need to contact CCM Support so this can be added for you.

Please note: all Barnet addresses are already in the system.


5.1. Address selection page

The screenshot shows the 'Add Family Wizard' Step 1: Address input section. The form includes the following fields and sections:

- Address input section:** Fields for House Number, House Name, Street Name, Address Line 2, Town Name, County Name, Postcode, and Area Name. A red asterisk indicates mandatory fields.
- Clear Inputs:** A button to clear the input fields.
- Matching address section:** A section titled 'List of Possible Matching Addresses' with a text area for displaying results.
- Clear Selection:** A button to clear the selection.
- Selection As Template:** A button to select the address as a template.
- Selection As Duplicate:** A button to select the address as a duplicate.
- Working address section:** A section with two text areas: 'Working Address' and 'Current Occupants'.
- Status:** A message indicating 'Pending New or Duplicate Address'.
- Go to Family View:** A button to navigate to the family view.
- Step Navigation:** A section with buttons for 'Previous', 'Next', 'Cancel', and 'Create Address Only'.

Enter the details of the family address or part details of an existing address into the relevant text boxes.

The street, town and area text boxes respond to the data being typed by providing a drop down list containing 'best matches' for the data currently entered. The matches are existing entries in the database. The user is able to select an entry from the list or continue to type and create a completely new entry. The drop down list of 'best matches' will display a maximum of 25 items.

Should you wish to delete a line entry from the address criteria then you can press the relevant delete icon.  To clear all the inputted data, click on the 'Clear Inputs' button.

5.2 Matching address section

As data is entered or selected in the input section, a list of 'matching' addresses will appear in the possible matching addresses list. The addresses listed are existing addresses in the system. The user is able to select and work with one of the addresses listed.

The possible matching addresses list will only display a maximum of 25 existing addresses. The user may need to further refine the data in the input section if the existing address they require does not appear in the list.



If the address that you are trying to input does not appear on the system, you will need to send the full address details to ccm.support@barnet.gov.uk to be inputted.

5.3. Working address section

The working address section displays summary details of the address with which to proceed.

When an address has been selected in the possible matching addresses list, the user will be working with an existing address and the details of the existing address will be displayed in the working address pane.

The current occupants at the selected existing address will appear in the current occupant's panel.

You should only add new families to an address where there are no current occupants.



If the current occupants at the address you require are different from the new registrants, you will need to archive the current family and contact CCM Support to create a duplicate record of the address. Refer to Section 5: Archiving.

When an existing address is selected, the correspondee for the address will be identified with a I and contact details will be displayed as illustrated below:

The screenshot shows a web interface with two main sections. The 'Working Address' section on the left contains the text: '4 Blackbird Rise, Indfield Drive, Eastbourne, BN10 4RR (West Side)'. The 'Current Occupants' section on the right contains a list with 'Miss Lisa Gordon (C)' and 'Mr Liam Gordon'. Below these sections, there is a status area showing 'UPRN: 11111111', 'Status: Currently Archived', 'Type: Existing Address', and 'Count: 2'. To the right of this is a 'Correspondent' box with details for 'Miss Lisa Gordon' (Tel: 02234 445566, Mobile, Email) and a 'Go to Family View' button.

The 'Go to Family View' button will become active when an existing address is selected. It provides the option to link directly to the Family Search window with the address pre-selected.

Once you have selected the required address with no current occupants, click next button to proceed.

5.4. Add family members

Working address section

The working address section displays the address at which new family members will be added. If the new address is an existing address in the system, the current occupants (if any) will be displayed in the 'Currently Existing Occupants' pane.

It is possible to create new members based on the details of an already existing family member. Select the existing family member the details of which best match the pending new member. Click on the 'Selection As Template' button. The 'Common' details will be imported into the member input section. Not all details will be imported, only shareable detail that has been set for the template occupant will be imported.

It is not possible to edit details for an existing family member using the wizard.

The screenshot shows the 'ChildView' application window titled 'The Children's Centre Manager'. The 'MAIN MENU' on the left includes 'Family', 'People', 'Add Family Wizard' (selected), 'Advanced Search', 'Service Providers', and 'Mail Merge/Data Extract'. The main area is 'Step 2' of the 'Add Family Wizard'. It has a 'Search' bar and a 'Add Family Wizard' button. The 'Address' field contains '11 Rose Drive Polegate BN87 8KL'. The 'Currently Existing Occupants' field is empty with the text '[No Existing Occupants]'. A red arrow points to this section with the label 'Working address section'. Below these fields is a 'Selection As Template' button. At the bottom, there are input fields for 'Title', 'Forename', 'Middle Name', 'Surname', 'Known As', 'Gender' (set to 'Unknown'), and 'DOB'. A note says 'Indicates mandatory fields *'. There are also checkboxes for 'Registered' (checked), 'Correspondent', 'Parent', and 'Child'. A 'Matching Individuals in the CCM: 0' indicator is shown.

Member Input Section

Enter the details and select the appropriate options for a new family member using the relevant text boxes and drop down lists.

It is possible to retain much of the input detail for a new member and have it applied to successive new family members. Member details that support this functionality will have a 'Hold' check box. If the 'Hold' check box is ticked, the contained data will not be cleared when the new member is added to the pending new occupants list.

Registered Check box

This check box is shown in various locations, including some reports. The purpose of this check box is to confirm that you have had a consent form from the individual concerned in relation to the data stored about them.

It is essential for Data Protection purposes that you have received consent from all parties concerned before you are permitted to keep any personal information about them.

Child field

Assuming you have entered the Date of Birth on the record, the system will know if the person is a child or adult. Entering the date of birth permits the automatic selection of the Child field.

Note: The system will automatically tick the 'Child' indicator for Children who are aged up-to-and-including 12 years. To record an individual aged 13 or over as a child, the 'Child' Field would have to be manually selected. This will not affect the reports, as they all use the date of birth to check the age of children.

If you have not entered the individual's date of birth, the system assumes the person is an adult, but not a parent. You will need to use the 'Adult' menu option in the Individual Full Details screen to modify these details.

It is, however, very important that all children have their date of birth entered on to the database. Without a date of birth the system has no way of knowing how old a child is and will ignore them for most of the reports. Provided the correct date of birth is entered, the system will maintain the record for you in terms of keeping their age up to date.

Correspondee field

This indicator is very important. It is used by the 'Correspondee mailing list for the selection' function (in the Attendance Review screen & Mail merge / Data Extract screen Output options, where you can generate a mailing list) to identify which person in each household you want to write to.

Decide who you would normally want to write to in each family.

If you do not want a family included in a mailing list, then simply ensure that nobody in the family has the 'Main Correspondee for the family?' indicator ticked.

If you want to write to more than one person at an address, you can tick more than one indicator. They will each be included in the mail list, and will therefore have their own, individually-addressed correspondence/labels.

Duplication checking

Once details have been entered in the Forename and / or Surname fields the duplication checker will check to see if there are any similar individuals in the database. The matching process occurs on similar 'sounding' names so the list of results won't always show exact matches.

Any possible matches will be shown in the matching individuals list box, and a count of the possible matches will show to the right hand side of the Forename / Surname fields:

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

HOME

Search

Family

People

Add Family Wizard

Advanced Search

Service Providers

Mail Merge

Data Extract

Indicates mandatory fields *

Title

Forename

Middle Name

Surname: Wilson

Known As

Gender: Unknown

DOB

Matching Individuals in the CCM: 10

Attributes: Registered ☒ Correspondent ☐ Parent ☐ Child ☐

List of Possible Matching Individuals

Matching Individuals [10]

Mr Alan Wilson - (Anyroad,) Gender: Male - DOB: 12/08/68

Alan Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 12/08/68

Ben Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 01/03/05

Bobby Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 12/06/02

David Wilson - (Ash Park, BNS 6TF) Gender: Male - DOB: 08/05/02

Only displaying the first 25 possible matches. You may need to refine your input details.

Phone

E-Mail

Mobile

NH Number

Doctor

Hold

Hold

Hold

Hold

Hold

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Once all the required data has been entered for the new family member press the 'Add Family Member' button to add to the pending new occupants list. Should any duplicates have been found you will need to tick the 'Please Confirm Individuals Reviewed to Proceed' checkbox to enable the 'Add Family Member' button.

You can quickly clear all input and reset the member input section to default by clicking the 'Clear All Input' button. Be aware that using this button will also reset all the 'hold' check boxes to the un-ticked state.

Personal details section

The Personal detail section allows you to enter additional data for the individual that you are adding to the database.

This section has been customised to match the registration form.

There are two different sections, one for adults and one for children.

Pending Members Section

The pending new occupants section displays all the newly created family members that are due to be added to the working address.

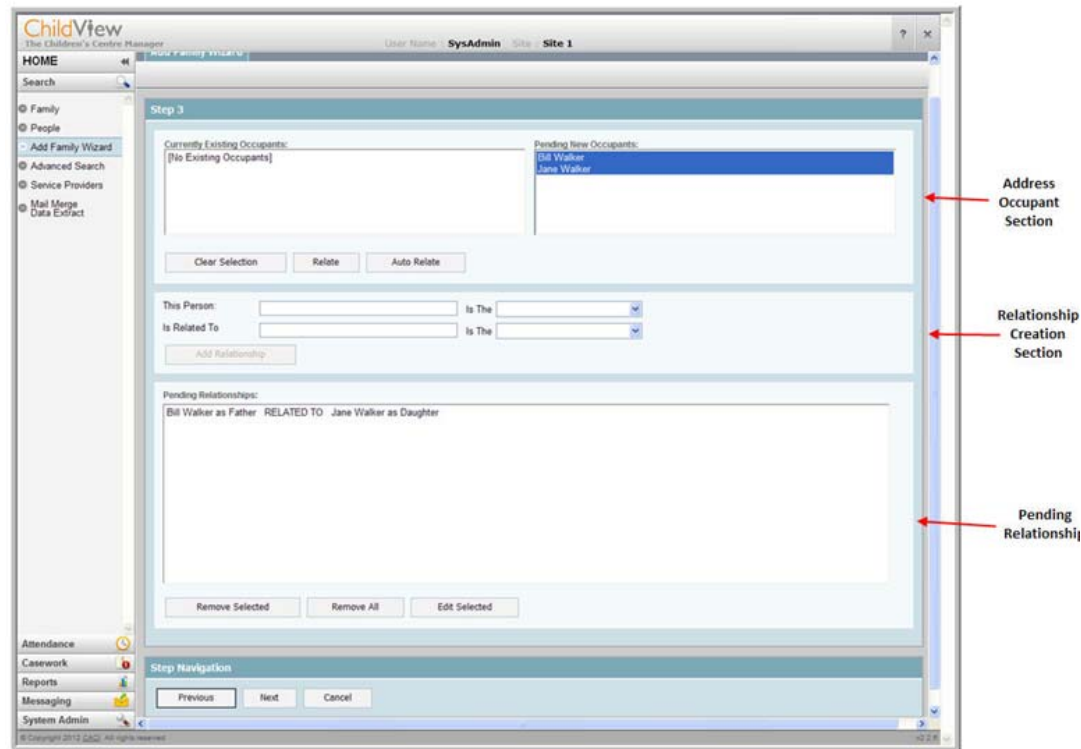
You can edit the details of a pending new member by selecting the member from the list and clicking the 'Edit Selected' button. The details of the selected member will be imported back into the member input section for editing. When editing a pending member, the buttons in the member input section will change to the 'Accept/Cancel' arrangement. Make the necessary changes to the member and click 'Accept Edit'.

You can remove a pending new member by selecting the member and clicking the 'Remove Selected' button.

You can remove all the pending new members by clicking the 'Remove All' button.

5.5. Adding relationships

The relationship page allows you to record the relationships between individual family members. The address occupants section displays the occupants at the previously specified address.



Address Occupants Section

The address occupants section displays the occupants at the previously specified address. Existing occupants in the left pane and pending new occupants in the right pane.

You can select pair combinations of occupants from either pane and then create a relationship between them.

Note: It is not possible to create relationships between two existing occupants.

Relationship Creation Section

With two occupants selected, you can define the relationship between them in this section.

Clicking the 'Relate' button will make the two occupants appear in the textboxes. A list of relation types will be populated in the dropdown next to the first occupant. Once the relation type for the first occupant has been selected, the corresponding relation types will be available for selection for the second occupant.

It is also possible to create a standard relationship set between all selected occupants using the 'Auto Relate' feature.

Note: You must select the relation types for both occupants before the relationship can be added to the pending list.

Auto relate

This button allows you to create a standard relationship set between all selected occupants using the 'Auto Relate' feature.

This will allow the user to quickly produce a set of relationships for a single new member of an existing family or even all members of a completely new family.

The standard relationships are defined as:

'First' Generation Relationships	Husband – Wife
	Father – Son
	Father – daughter
	Mother – Son
	Mother – Daughter
'Second' Generation relationships	Brother – Brother
	Brother – Sister
	Sister – Sister

The Auto-Relate feature uses the 'parent' and 'gender' settings for the selected members to select the appropriate relationship. This means that selected members without a gender set (or set to 'Unknown') will not be auto-related. Selected members with parent status will naturally be one side of a first generation relationship. Those without parent status will always be one side of a second generation relationship.

You can create auto-relationships between two or more selected occupants. Auto-relationships can be created between each selected existing member to each and every pending selected member. Auto-relationships can be created between all possible pair combinations of the selected pending members. Auto-relationships cannot be created between the selected existing members.

To create relationships automatically, select the occupants to relate and click the 'Auto Relate' button.

Step 3

Currently Existing Occupants:	Pending New Occupants:
[No Existing Occupants]	David Soames Sheila Soames Matilda Soames Davie Soames

This Person: Is The

Is Related To Is The

Pending Relationships:

David Soames as Husband	RELATED TO	Sheila Soames as Wife
David Soames as Father	RELATED TO	Matilda Soames as Daughter
David Soames as Father	RELATED TO	Davie Soames as Son
Sheila Soames as Mother	RELATED TO	Matilda Soames as Daughter
Sheila Soames as Mother	RELATED TO	Davie Soames as Son
Davie Soames as Brother	RELATED TO	Matilda Soames as Sister

Note: Hold the 'Ctrl' key to make multiple selections.

Relationships for all possible combinations will be added to the pending relationships list.

You can edit any auto-generated relationship in the same way as a manually created one. Select the relationship to edit and click 'Edit Selected' button.

Note: Only one relationship between the same two members will be permitted.

Pending Relationships Section

The pending relationships section displays all the newly created relationships that are due to be added to the pending occupants.

You can edit the details of a pending new relationship by selecting the relationship from the list and clicking the 'Edit Selected' button. The details of the selected relationship will be imported back into the relationship creation section for editing. Make the necessary changes to the member and click 'Accept Edit'.

You can remove a pending new relationship by selecting the member and clicking the 'Remove Selected' button.

You can remove all the pending new relationships by clicking the 'Remove All' button.

Relate – Manually setting relationships

Clicking this button will cause the names of the two occupants to appear in the text boxes.

Step 3

Currently Existing Occupants:

- John Benny, DOB: 23 Sep 1968, Age: 44
- Michelle Benny, DOB: 01 May 1985, Age: 28
- Jack Benny, DOB: 04 Feb 2000, Age: 13

Pending New Occupants:

- Sharon Benny

Clear Selection Relate Auto Relate

This Person: Jack Benny, DOB: 04 Feb 2000, Age: 13 Is The

Is Related To Sharon Benny Is The

Add Relationship

Select the relation type for the first occupant from the list of available relations.

When the selection has been made, the relation type options for the second occupant will be populated.

Select the relation type for the second occupant.

Step 3

Currently Existing Occupants:

- John Benny, DOB: 23 Sep 1968, Age: 44
- Michelle Benny, DOB: 01 May 1985, Age: 28
- Jack Benny, DOB: 04 Feb 2000, Age: 13

Pending New Occupants:

- Sharon Benny

Clear Selection Relate Auto Relate

This Person: Jack Benny, DOB: 04 Feb 2000, Age: 13 Is The Brother

Is Related To Sharon Benny Is The Sister

Add Relationship

Accept the new relationship by clicking the 'Add Relationship' button. The new relationship will be added to the pending relationships list.

Using the same process, continue to create and add new relationships for each occupant pairing as required.

Note: Only one relationship between the same two members will be permitted.

Once all the relationships have been created, click the 'Next' button to move to the Pending Additions Summary page where you can review the details added previously.

5.6. Creating professional relationships

The Add Family Wizard includes the functionality to enable one or more professional relationships to be created for an individual. The illustration below shows a Health Visitor (Sally Evans) being assigned to David George.

ChildView
The Children's Centre Manager

User Name : User Site : Management Console

HOME Search

Family
People
Add Family Wizard
Advanced Search
Service Providers
Mail Merge
Data Extract

Attendance
Casework
Reports
Messaging
System Admin
Site Admin

SEARCH >>> ADD FAMILY WIZARD

Add Family Wizard

Add Professional Relationships

Currently Existing Occupants:
Ms Amanda Parrish, DOB: 07 Aug 1967, Age: 46
Mr Andy George, DOB: 17 Sep 1995, Age: 18
Mr Alan George, DOB: 22 Oct 1996, Age: 17
Mr Colin George, DOB: 29 Dec 2003, Age: 9

Pending New Occupants:
David George

Service Provider (300 Maximum)

Central Surgery			
Children Centre			
Connexions			
Health Centre			
Health Visitors			

Professional (300 Maximum)

Sally Evans	12 Collingwood Place BN10 9FF	01155-678901	sallyevans@internet.com
Sophie Heworth			
Steve Jenkins	12 The Street, Eastbourne	01323-987654	
Suki Ahsam			
Vicky Rowe			

Professional relationships can be added and removed in the same way as in Family Relationships.

ChildView
The Children's Centre Manager

User Name : User Site : Management Console

HOME Search

Family
People
Add Family Wizard
Advanced Search
Service Providers
Mail Merge
Data Extract

Attendance
Casework
Reports
Messaging
System Admin
Site Admin

SEARCH >>> ADD FAMILY WIZARD

Add Family Wizard

Add Professional Relationships

Currently Existing Occupants:
Ms Amanda Parrish, DOB: 07 Aug 1967, Age: 46
Mr Andy George, DOB: 17 Sep 1995, Age: 18
Mr Alan George, DOB: 22 Oct 1996, Age: 17
Mr Colin George, DOB: 29 Dec 2003, Age: 9

Pending New Occupants:
David George

Service Provider (300 Maximum)

Central Surgery			
Children Centre			
Connexions			
Health Centre			
Health Visitors			

Professional (300 Maximum)

Sally Evans	12 Collingwood Place BN10 9FF	01155-678901	sallyevans@internet.com
Sophie Heworth			
Steve Jenkins	12 The Street, Eastbourne	01323-987654	
Suki Ahsam			
Vicky Rowe			

This Person: David George Has a professional relationship with: Sally Evans Service: Health Visitors

Relation Type: Carer

Start Date: 19 Dec 2013

Add Relationship ☐ Apply to Family

Pending Professional Relationships:

Remove Selected Remove All

Step Navigation

Previous Next Cancel Create Address Only

5.7. Pending additions summary and confirmation

A summary of information you have entered for your review. You can also go back to alter data if required.

SEARCH >> ADD FAMILY WIZARD

Add Family Wizard

Step 4

Address Detail Summary
Working with the existing address: 1 Crow Court, Eastbourne, BN9 5UT, (Coles Estate)

Member Detail Summary
2 new family members will be added summarised as...
Mr Bill Walker
Jane Walker

Relationship Detail Summary
All defined relationships will be created.

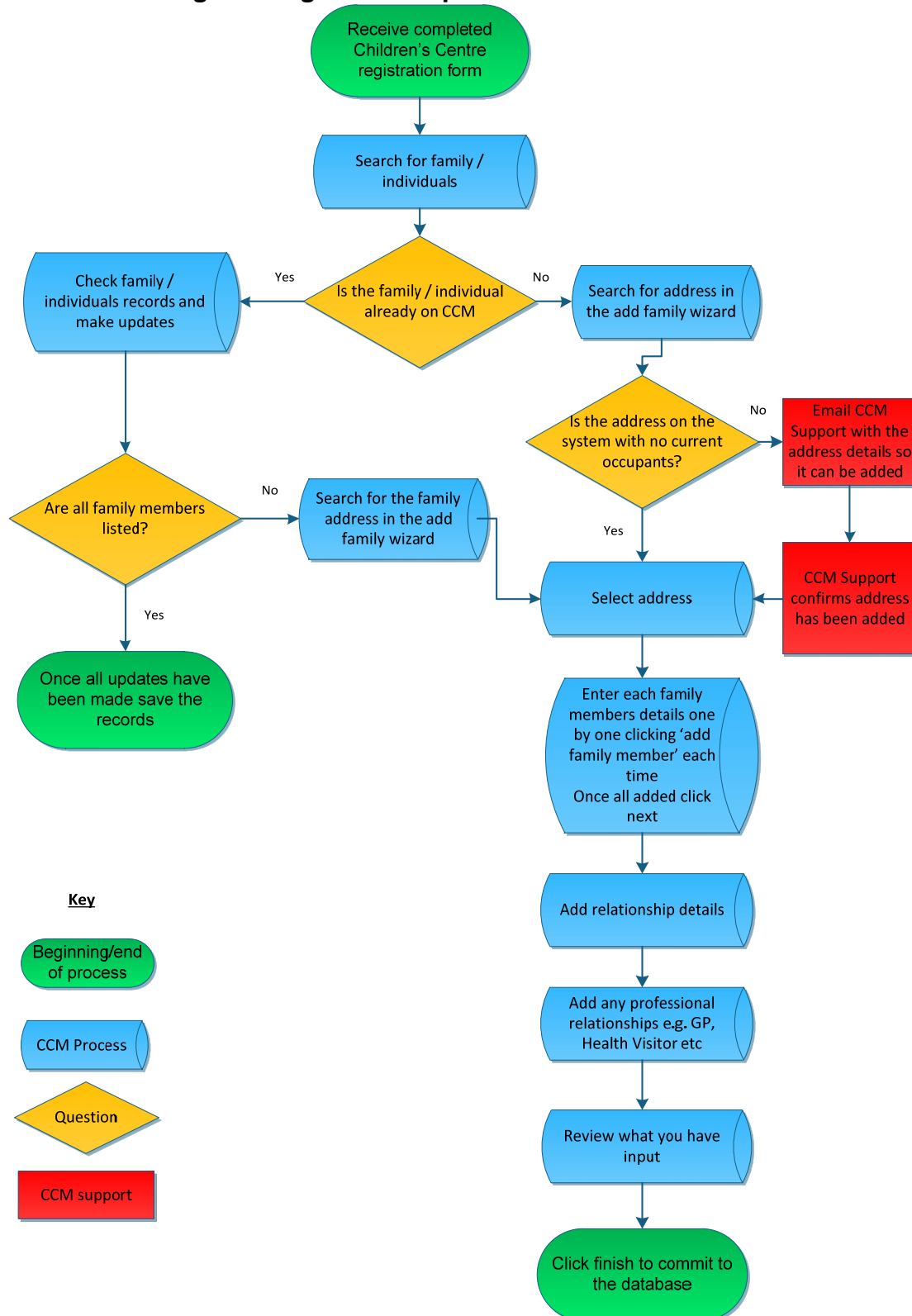
Step Navigation

Previous Next Cancel

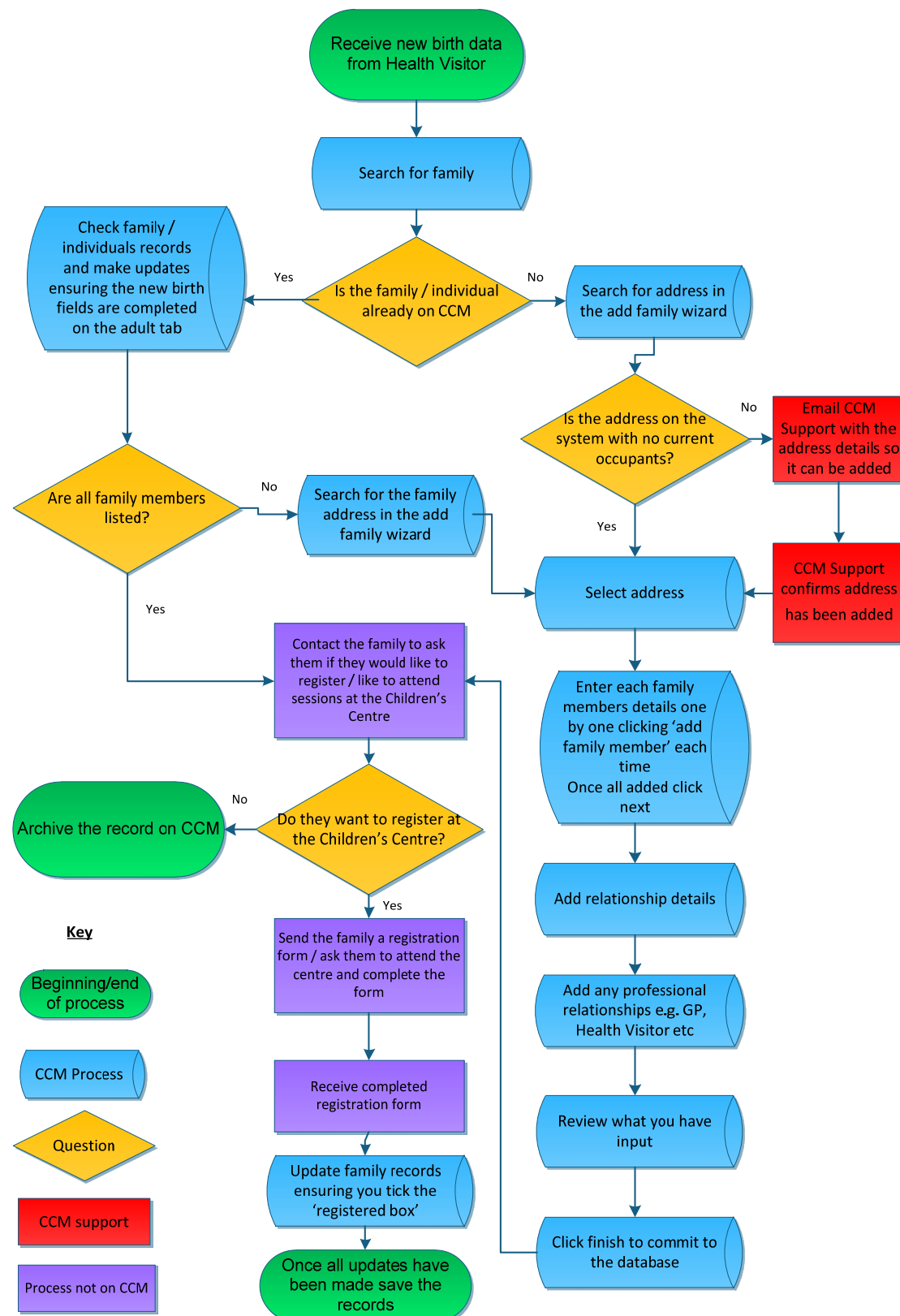
Click next.

On the following screen click Finish to commit information to database. The wizard will then go to the Family Search screen with the new address and occupants displayed.

5.8. Adding new registrations process



5.9. Adding new birth data process



Section 3: Attendance menu

1. Attendance overview

The attendance menu item located on the left hand side of the screen on CCM.

The attendance menu contains the starting point for adding records of attendance at the various activities your programme provides (the input option).

It also provides you with a very flexible and powerful tool for reviewing and analysing the overall attendance at those activities, through the review option.

Please note: the attendance review is not covered in the basic user training guide.

1.1. Attendance summary

It is possible to gain summary information about activities / sessions.

From the Side Menu, click the Attendance button, then click the Input option. You will see a screen similar to this:

MAIN MENU

- Search
- Attendance
 - Input
 - Review
 - Barcode Registers
- Casework
- Reports
- System Admin

ATTENDANCE >> INPUT

Attendance Input

Please select an Activity

Adult Learning MAR 2013

View Sessions New Activity

Select Session

Please select an Activity.

Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Adult Learning MONTHLY		0			

Manage Bookings Manage Attendances Copy Session New Session Edit Session Delete Session

Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.

You can now view information about the number of Attendees (not the number of attendances), the number of Bookings (i.e. the number of people who have expressed an interest to attend this session), Maximum Capacity of the session and also the number of Spaces Remaining for the selected activity type.

A negative number in the 'Spaces Remaining' column shows that the session is over subscribed.

1.2. Activities

Activities are the pre-set over-arching theme for all sessions. They also have the Tiers and Every Child Matter Outcome pre-allocated to them.

For example, a centre can create a Coffee Morning session can fall into a 'stay and play' activity.

Centres can name their sessions as they wish, but must categorise them using the activity groups listed in the session relationship table. This allows for effective performance reporting.

Table 1: Activity relationship table

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Adult Learning	Any course/workshop/training designed focussed on adult learning	<ul style="list-style-type: none"> • Manicure & Pedicure • Complimentary Health • First Aid • Health & Safety • IT courses • Parenting Courses • Adult Numeracy/Literacy • Parent Volunteering • ESOL 	<ul style="list-style-type: none"> • Tier 1 • ESOL • Adult learning • (ESOL is a targeted course, and would need to be recorded as a Tier 2) 	<ul style="list-style-type: none"> • Healthy living
Baby Groups	Any activities focussed on babies under 1 year old	<ul style="list-style-type: none"> • Breastfeeding sessions • Baby Massage • Baby Yoga • Baby weaning • Baby Play/Group • Baby Makaton • Baby Rhyme Time 	<ul style="list-style-type: none"> • Tier 1 • Baby weighing • Breastfeeding support • Immunisations • Transitions to solids 	<ul style="list-style-type: none"> • Child development • Healthy living • Physical development
Child Health Services	Events aimed at the health and wellbeing of children 0-5 years	<ul style="list-style-type: none"> • Health visitor appointments • Baby clinic • Immunisations • Development checks • Healthy start vitamins 	<ul style="list-style-type: none"> • Tier 1 • Transitions to solids • Healthy eating • Baby weighing • Immunisations • Oral health • Breastfeeding support 	<ul style="list-style-type: none"> • Child development • Healthy living

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Childminder Groups	Sessions aimed at registered childminders	<ul style="list-style-type: none"> Childminder Drop-in 	<ul style="list-style-type: none"> Tier 1 	<ul style="list-style-type: none"> Creativity Holistic play
Community Support Outreach	<p>Activities in the community aimed at promoting the Children's Centre that are run at other community venues</p> <p>This does not include all sessions run at linked venues i.e. stay and play etc</p>	<ul style="list-style-type: none"> Schools fetes Community festivals/events School open evenings Information stalls 	<ul style="list-style-type: none"> Tier 1 	<ul style="list-style-type: none"> Knowing your community
Crèche	Occasional childcare for children during particular events such as parenting programmes.	<ul style="list-style-type: none"> Crèche 	<ul style="list-style-type: none"> Tier 1 	
Domestic Violence	Specialist service designed to support vulnerable families.	<ul style="list-style-type: none"> DV Safer Families DV Stay & Play DV Parenting DV Counselling 	<ul style="list-style-type: none"> Tier 3 	<ul style="list-style-type: none"> Parenting support Building confidence
Economic Wellbeing	Activities and advice from specialist and/or CC that assist families in achieving economic wellbeing.	<ul style="list-style-type: none"> Citizen's Advice Welfare Rights Advice & Information Employability courses Housing Support Advice & Information REED 	<ul style="list-style-type: none"> Tier 1 Access to benefits / training / employment / legal advice / volunteering opportunities / housing support 	<ul style="list-style-type: none"> Building confidence

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Early Learning & School Readiness	Any activity that supports a family in transitioning a child into pre-school/nursery or school.	<ul style="list-style-type: none"> • Transition Support • Preparing for school • Meet the teacher • Preparing parents to support children to go to school • Workshops/sessions on FEE or FEE2 • Speech and Language stay and play (i.e. chatty play/SPLAT) – This does not include S&L drop in • Toy Library • Book club/library 	<ul style="list-style-type: none"> • Tier 1 	<ul style="list-style-type: none"> • Child development • Language development
Extended Services	Activities held for children outside of school hours.	<ul style="list-style-type: none"> • Breakfast Clubs • After school clubs • Holiday schemes 	<ul style="list-style-type: none"> • Tier 1 	<ul style="list-style-type: none"> • Social development • Physical development • Creativity • Holistic play
Family Support Outreach	Aimed at families referred/self-referred, potentially at risk requiring additional family support.	<ul style="list-style-type: none"> • CAFS (reviews/meetings) • Outreach phone calls and correspondence • Outreach in centre • Outreach out of centre 	<ul style="list-style-type: none"> • Tier 2 • Any other relevant target can be added depending on what is covered in the session 	<ul style="list-style-type: none"> • Any appropriate aims

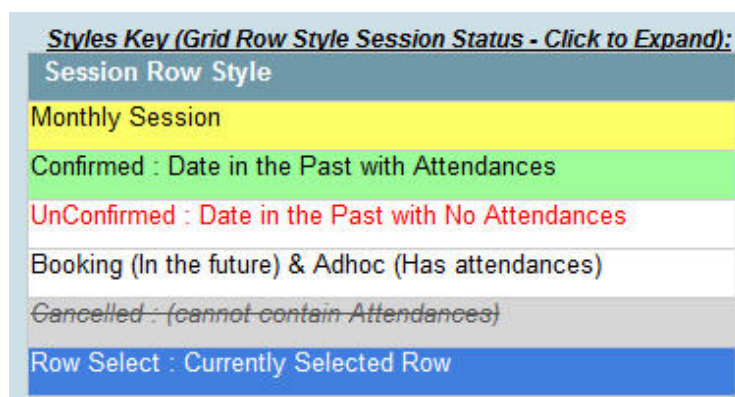
Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Family Support Outreach – Home visits	Aimed at families referred/self-referred, potentially at risk requiring additional family support	<ul style="list-style-type: none"> Home visits 	<ul style="list-style-type: none"> Tier 2 Any other relevant target can be added depending on what is covered in the session 	<ul style="list-style-type: none"> Any appropriate aims
Health & Safety	Events focussed at promoting family health or safety either as an individual or in the home.	<ul style="list-style-type: none"> Healthy cooking Fire safety Home safety 	<ul style="list-style-type: none"> Tier 1 Transitions to solids Healthy eating Oral health Immunisations Smoking cessation Baby weighing 	<ul style="list-style-type: none"> Healthy living Safety in the home
Male Carers Groups	Sessions aimed at male carers.	<ul style="list-style-type: none"> Fathers groups U8's football 	<ul style="list-style-type: none"> Tier 2 	<ul style="list-style-type: none"> Parenting support
Maternity Services	Events aimed at new or expectant parents.	<ul style="list-style-type: none"> Ante Natal Classes Post natal classes Unity 	<ul style="list-style-type: none"> Tier 2 Baby weighing Breastfeeding support (Unity is a specialist service, and would need to be recorded as a Tier 3) 	
One-off Events	One off events run by the Children's Centre.	<ul style="list-style-type: none"> Fundraising events Day trips Educational visits Fun-days 	<ul style="list-style-type: none"> Tier 1 	

Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Parenting Programmes	Evidence based parenting programmes these are specialist run courses.	<ul style="list-style-type: none"> Strengthening families Triple P Incredible Years Solihull Family Links 	<ul style="list-style-type: none"> Tier 2 	<ul style="list-style-type: none"> Parenting support
Parenting Support Workshops	Parenting support workshops can include bespoke workshops/short courses of parenting support needs including supporting parents with routines, sleep, potty/toilet training and can be run by CC staff, Health Visitors or partner organisations.	<ul style="list-style-type: none"> Child sleep workshops Toilet training workshops Behaviour advice workshops 	<ul style="list-style-type: none"> Tier 1 Adult learning 	<ul style="list-style-type: none"> Parenting support Child sleep support Toilet training support Behaviour support
Parents Groups	Sessions for parents where their children are not present.	<ul style="list-style-type: none"> Parent support groups Parents forums Coffee mornings Advisory Boards 	<ul style="list-style-type: none"> Tier 2 	<ul style="list-style-type: none"> Parenting support
Significant contact and advice	Time spent giving information and advice to parents. This could be face-to-face or a telephone contact. Full details should be recorded in the notes. This is not to include mail-shots of timetables.	<ul style="list-style-type: none"> Breastfeeding advice Telephone surveys Follow-up phone calls e.g. new birth or requesting additional information against registration data 	<ul style="list-style-type: none"> Tier 1 / Tier 2 Breastfeeding support 	<ul style="list-style-type: none"> Parenting support

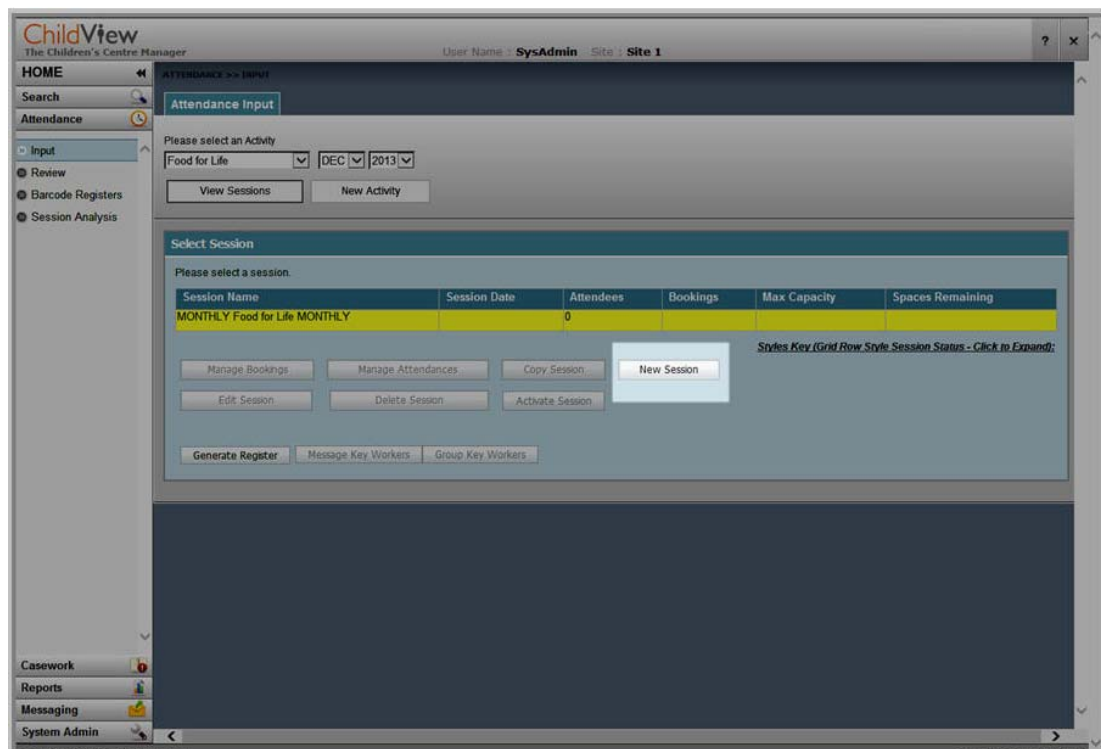
Activity	Description	Example of sessions	CCM session target (only select those appropriate to the session)	CCM session aims (only select those appropriate to the session)
Special Needs	Events aimed at families with special education needs (normally run by specialist services)	<ul style="list-style-type: none"> • Open Doors • Mencap • Rainbow Trust • Parents of Down Syndrome Group • Any SEN support group • Speech and Language (1:1) 	<ul style="list-style-type: none"> • Tier 3 	<ul style="list-style-type: none"> • Building confidence • Social development • Emotional development • Language development
Stay and Play	Events for all families focussed on play and development	<ul style="list-style-type: none"> • Stay & Play • Messy Play • Creative Play • Parent & Toddler Group • Music Groups 	<ul style="list-style-type: none"> • Tier 1 	<ul style="list-style-type: none"> • Creativity • Holistic play • Physical development • Social development
Young Parent Groups	Sessions aimed at young and teenage parents (aged 13-24 years)	<ul style="list-style-type: none"> • Arts Depot Activity Run Events • Teenage mother groups 	<ul style="list-style-type: none"> • Tier 2 • (any other relevant target can be added depending on what is covered in the session) 	<ul style="list-style-type: none"> • Parenting support

1.3. Creating a new session

1. To create a session the Activity type must already be set up in the system.
2. From the Side Menu, click the Attendance button, then click the Input option.
3. Select the appropriate entry in the drop down activity list.
4. Press the 'View Session' button. Any existing sessions are listed and colour coded. A key can be displayed by clicking on 'Styles Key (Grid Row Style Session Status - Click to Expand):'



5. Click the 'New Session' button:



You will then be presented with the following screen:

The screenshot displays the CCM system interface. On the left is a sidebar with a 'MAIN MENU' and options: 'Search', 'Attendance', 'Input', 'Review', and 'Barcode Registers'. The main area is titled 'Time / Date Options - Click to expand / collapse'. It contains fields for 'Activity' (Adult Learning), 'Location', 'Date' (20 Mar 2013), 'Time' (From 00:00 To 23:55), 'Session Name' (ESOL), 'Comment' (Level 33), 'Charge Rate £' (0.00), 'Charge Type', and 'Max Capacity' (0). Below this is a section titled 'Key Worker / Service Provider / ECM / Recurrence Options'. It has tabs for 'Services & Key Workers', 'Every Child Matters', 'Targets & Aims', and 'Booking Pattern'. The 'Services & Key Workers' tab is active, showing a list of 'Service Providers' (including '[NEW SERVICE PROVIDER]', '2 year old scheme', 'Baby Yoga', 'Barnet and Southgate college', 'Barnet Library Services', 'CAB', and 'Cash Money Management') and a 'Key Workers' section with a 'Default Key Workers' button and a 'Next >>' button.

Please note: it is best practice to use a uniform naming convention for sessions entered onto CCM to allow for simple reporting. Currently there is not the functionality to run reports based on session names; however there is a query that can be used.

1.3.1. Fields and tabs

Time / date options

The activity and location drop downs provide information about the type of session to be held and also where it is located.

When creating sessions, it is best practise to specify a start and end time of the session. Clicking in the box to the right of the word 'time' will allow you to specify the session time in the drop down boxes that become available.

For reference purposes you can specify the amount you will charge for the session (charge rate) and also the charge type from the drop down box. Charge type refers to the charging structure i.e. on a per adult basis, per family basis etc.

Finally ensure the max capacity reflects the maximum number of people who can attend the session.

Key Worker / Services / ECM / Targets/Aims/Resources/Booking Pattern

In this section you can select those Key Workers, Service Providers, Every Child Matters outcomes, local Targets & Aims and Resources that you wish to associate with the session.

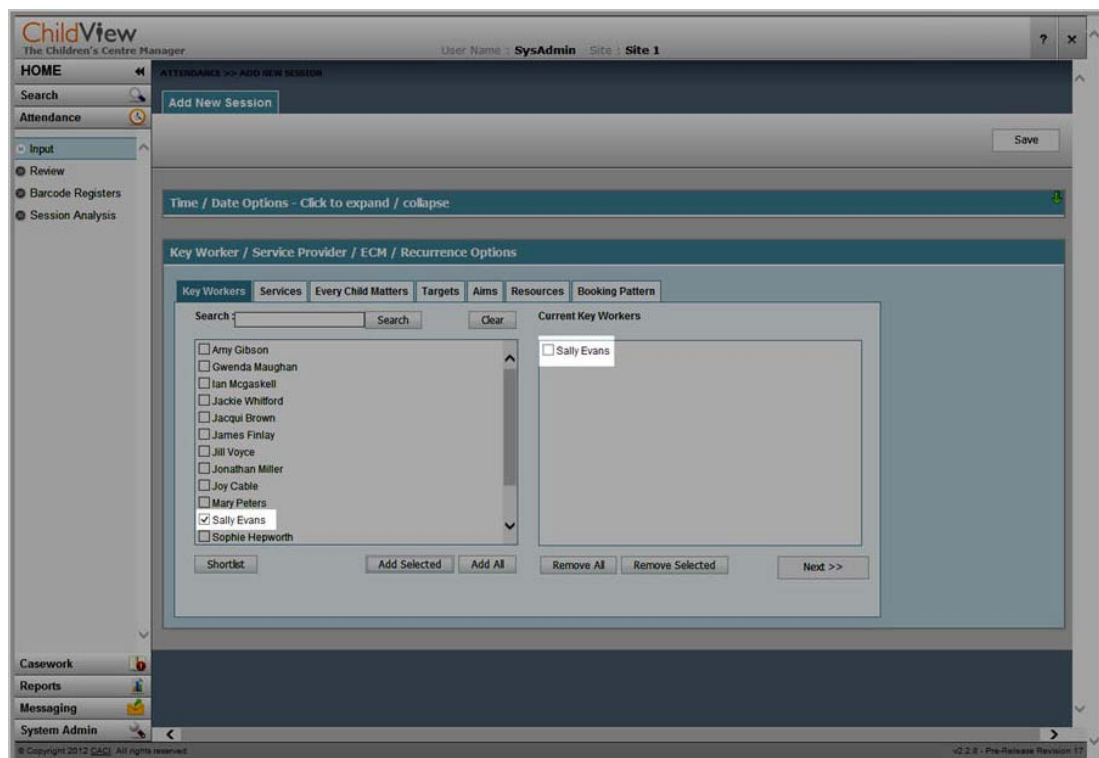
To add items to the session, tick one or more in the left hand pane and click the 'Add Selected' button. The 'Add All' button will add all items irrespective of whether or not they are ticked.

Items added will appear in the right hand pane and can be removed by using the 'Remove Selected' or 'Remove All' buttons.

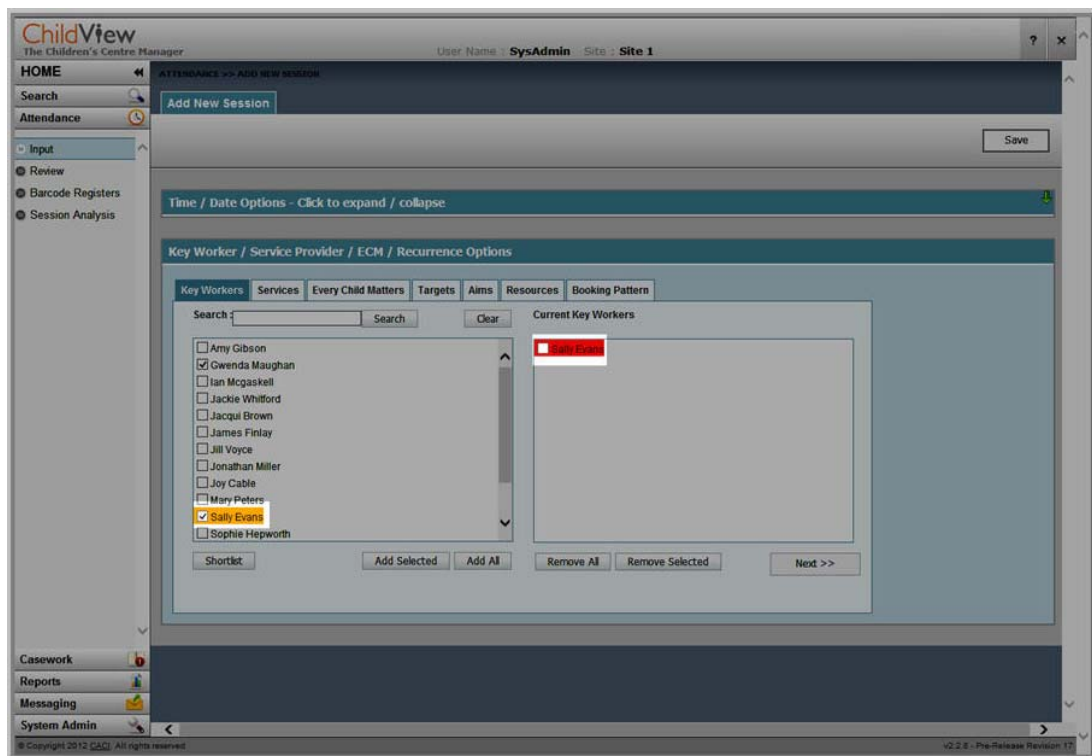
The default targets for the activity will be copied to a new session. You should always review these and update where appropriate.

Please refer to Section 3: Attendance Overview, section 3.4.2 Targets and Aims for further details.

You can either select the applicable tab or press the 'Next' button to move to the relevant screen. The following example shows the Key Workers tab during Add New Session with default settings from the Activity:



Where there is a potential double booking situation (Date and Time) for either a Key Worker or a Resource a warning will be displayed in the form of a colour code as in the following example:



Booking Pattern

The booking pattern tab will allow you to create multiple sessions of the activity type being created i.e. Food for life every week on a Saturday morning.

Once you have entered all of the session details, press the 'Save' button to set up the sessions in the database. You will be presented with the following confirmation screen:



Press 'Add Attendees' to go directly to the manage attendances screen or 'Finish & go To Menu' to return to the list of sessions for the selected activity.

Table 2: fields and tabs quick reference guide

Activity*	Prefilled with activity chosen in previous screen.
Location*	The room/venue session will be held in.
Date*	Course start date
Time*	Tick the time box if the sessions are being held at the same time whenever it reoccurs.
Session Name*	Name of the session being run.
Comment	Any additional comment i.e. what is covered in the session, level of the course etc.
Charge	Any charge per session
Charge Type	Per person, adult, child or family
Max Capacity	Capacity of the room or group
Services*	<p>If sessions that have been run at the centre have been provided by external organisations e.g. Welfare Rights, Unity, REED etc. This must be recorded in the service provider tab.</p> <p>By recording this you are able to run reports to show how many sessions have been run in conjunction with specific service providers.</p> <p>Please note: If a service provider is not listed, email ccm.support@barnet.gov.uk to request for it to be added to the system. Where possible provide the contact details for this service.</p>
Key Workers*	<p>For every session that is run by the centre, the key workers should be recorded. This can include anyone that participated in the running of the session including Children's Centre workers, volunteers and key workers from external agencies such as Health Visitors etc.</p> <p>Please note: If a key worker is not listed, email the name, job title, organisation and contact details to ccm.support@barnet.gov.uk to request for them to be added to the system.</p>
Every Child Matters Outcome	Pre-set but can be amended for a session as required.

Targets *	<p>Targets are the 3 tiers of services, pre-set to activities but can be amended for each session.</p> <p>There are additional targets (please refer to the targets and aims section below); that must be selected for sessions with this focus.</p>
Aims	<p>Aims are similar to targets, and are used to record outcomes of sessions (please refer to the targets and aims section below).</p>
Booking Pattern	<p>If a group is recurring at regular intervals, set up the recurrence in this tab by choosing day, number of occurrences and type of occurrence (daily, weekly, and fortnightly).</p>

*those with a star must be entered for every session inputted.
This information feeds into data used in performance reports.

1.3.2. Targets and Aims

All activity groups have pre-set targets; these are in the form of tiers. When you enter the details of a new session, it will automatically set to the relevant tier.

You must always check the targets and update where necessary.

Every Child Matter (ECM) Outcomes* are also pre-allocated to sessions.

***Please note** that ECM outcomes are no longer used to report on as the Government no longer requires Early Years to use them. This is a standard tab within CCM and this is why it will still appear on the system.

Definitions of tiered services

Tier 1 services

Tier 1 services are universal services that all families can access.

Tier 2 services

Tier 2 services are aimed at targeted families.

Tier 3 services

Tier 3 services are only provided by external agencies / professionals.

Targets that can be assigned to sessions

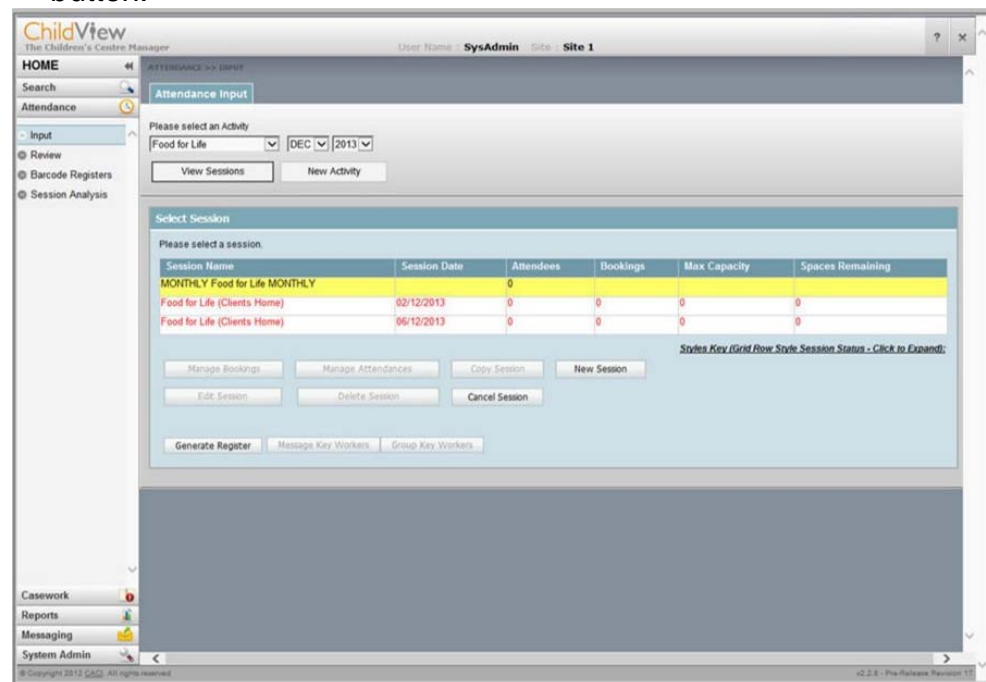
- Access to benefits
- Access to training
- Access to employment
- Access to legal advice
- Access to volunteering opportunities
- Access to housing support
- Smoking cessation
- Transitions to solids
- Healthy eating
- Baby weighing
- Immunisations
- Oral health
- Breastfeeding support
- ESOL
- Adult learning

Aims that can be assigned to sessions

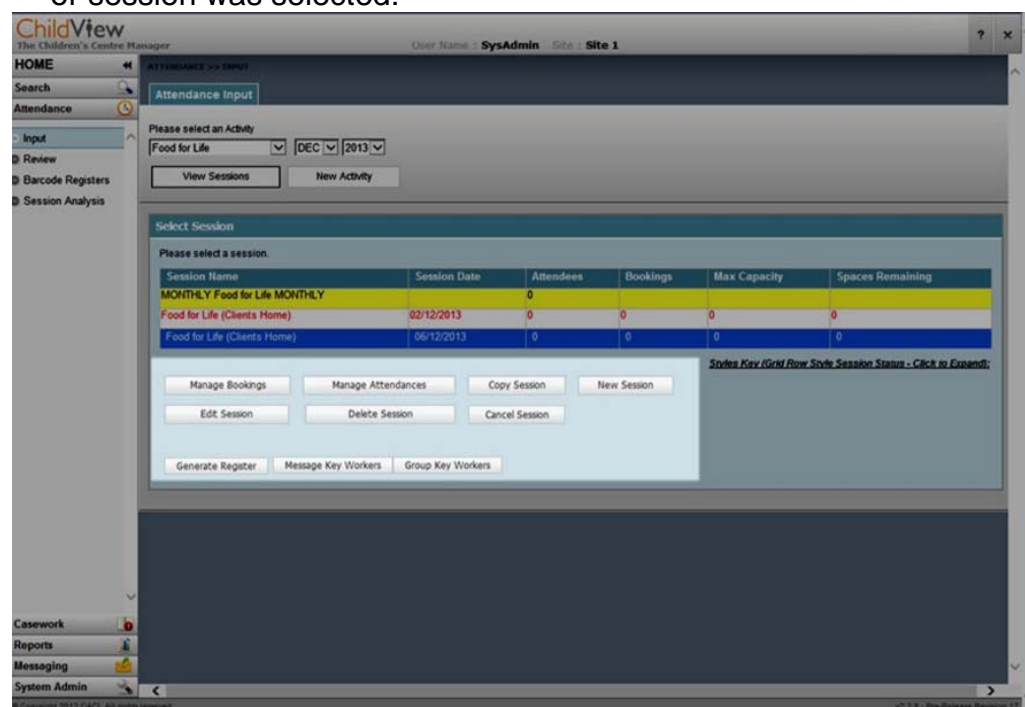
- Child development
- Physical development
- Emotional development
- Social development
- Language development
- Building confidence
- Creativity
- Holistic play
- Parenting support
- Child sleep support
- Healthy living
- Toilet training support
- Behaviour support
- Safety in the home
- Knowing your community

1.4. Manage attendances

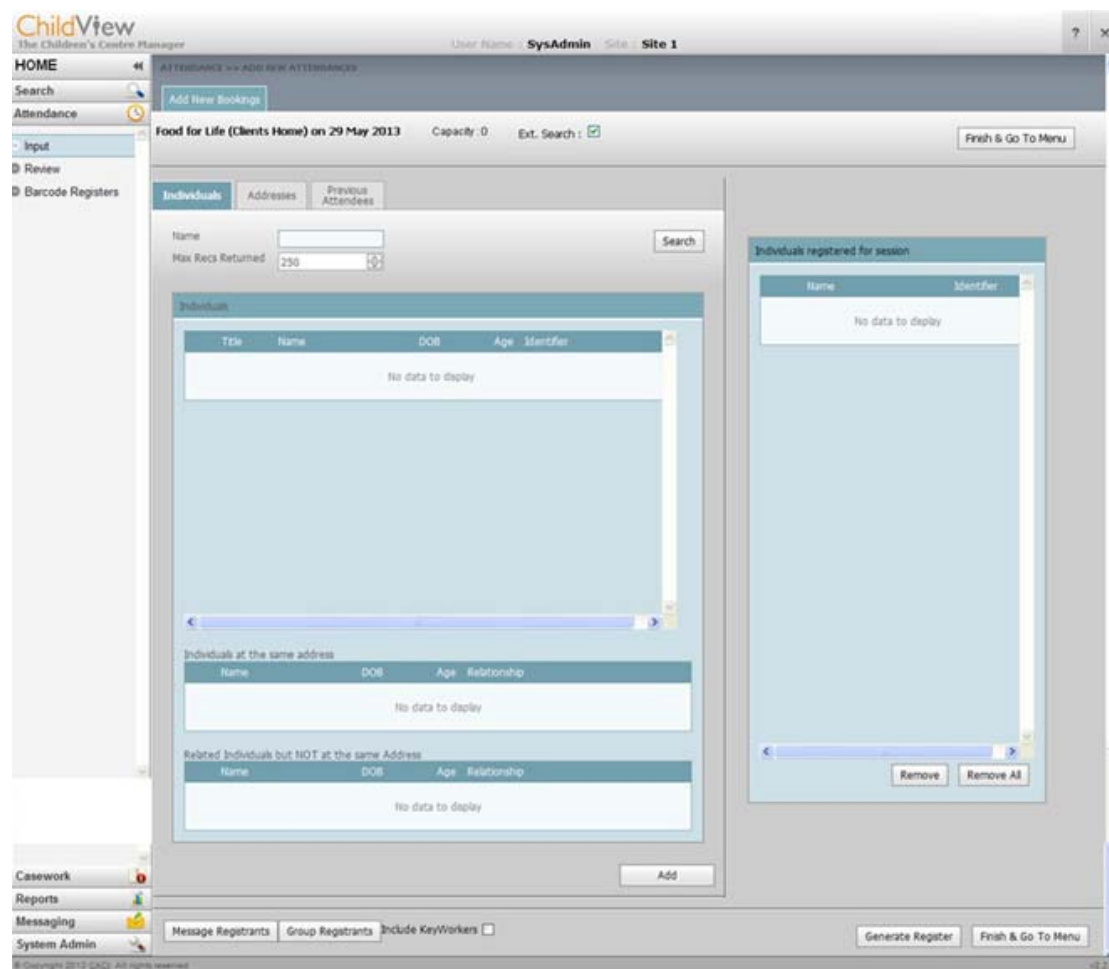
1. From the Side Menu, click the Attendance menu, then click the Input option.
2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.



3. Clicking on the Session of interest will enable the buttons at the bottom of the screen. The buttons being enabled will depend upon whether an activity or session was selected:



So that you can register those people who are interested in attending a session press the 'Manage Attendances' button. This will open a screen similar to the following:



4. You now have a number of options to search for those people you would like to register for the session. Selecting the applicable tab (Individuals/Addresses/Previous Attendees) will allow you to enter search criteria, and pressing the 'Search' button will return those matching records.

In each case the number of records returned will be limited by the value in the 'Max Records Returned' box (default value 250).

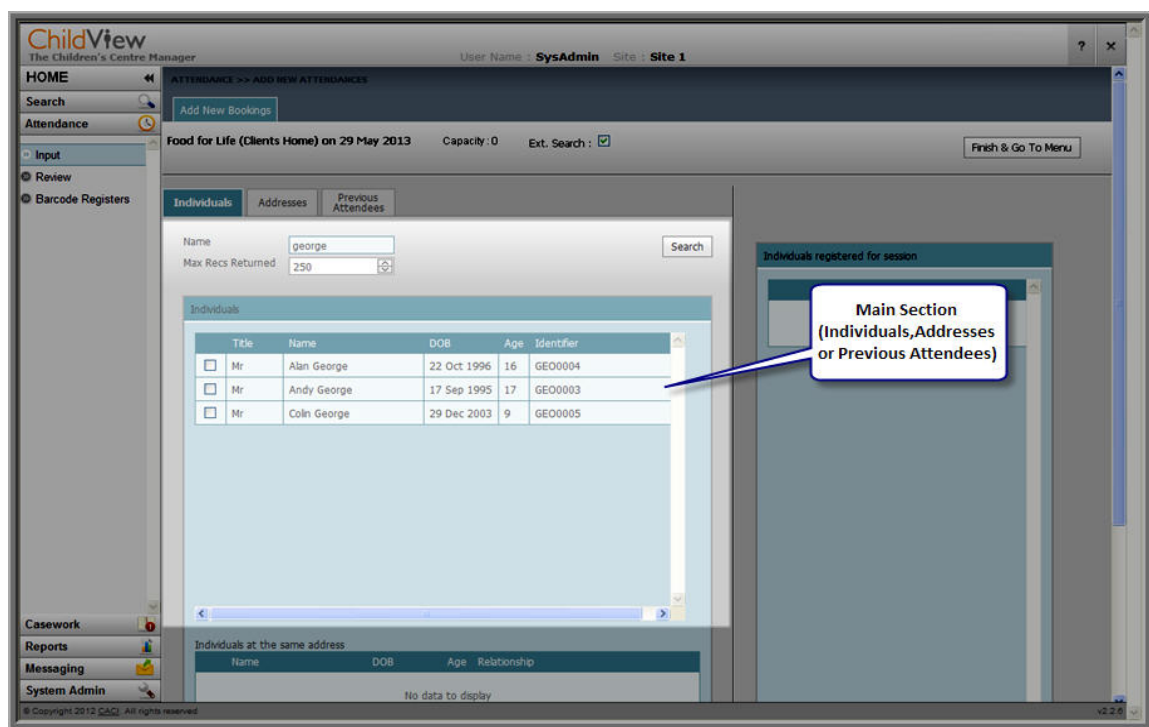
The previous attendees tab will show those people who have attended a similar session in the past 3 months.

Each Search Tab breaks down into 3 sections, as illustrated below. The Main Section in each case will reflect the main search results (Individuals, Addresses or Previous Attendees).

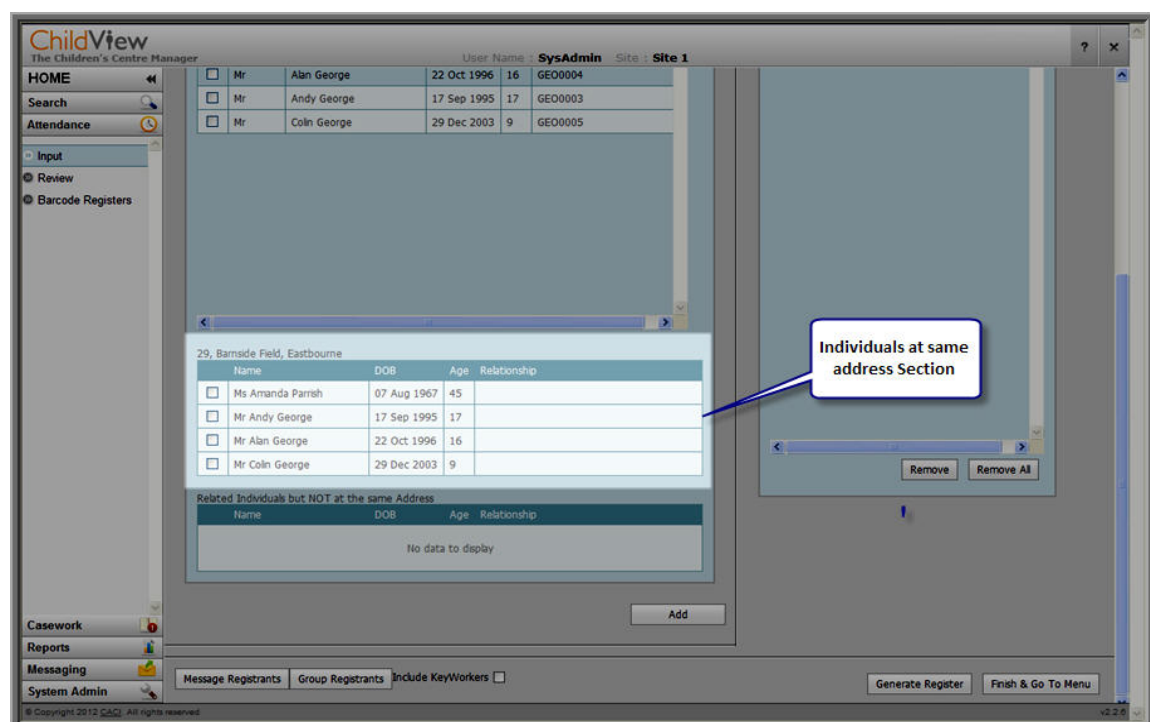
When an individual or address in the top section is clicked, the middle section will display individuals who live at the same address. When an

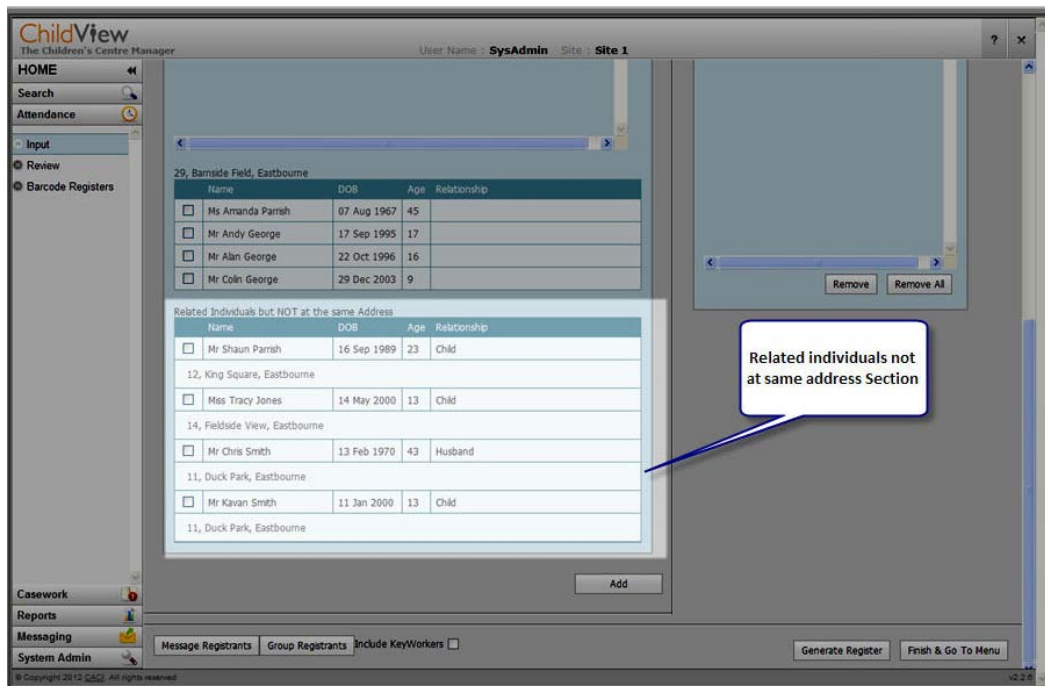
individual is clicked in the middle section, the bottom section will display any other individuals who are related to the selected individual, but don't live at the same address.

Each Search Tab breaks down into 3 sections. The Main Section in each case will reflect the main search results (Individuals, Addresses or Previous Attendees). When an individual or address in the top section is clicked, the middle section will display individuals who live at the same address.

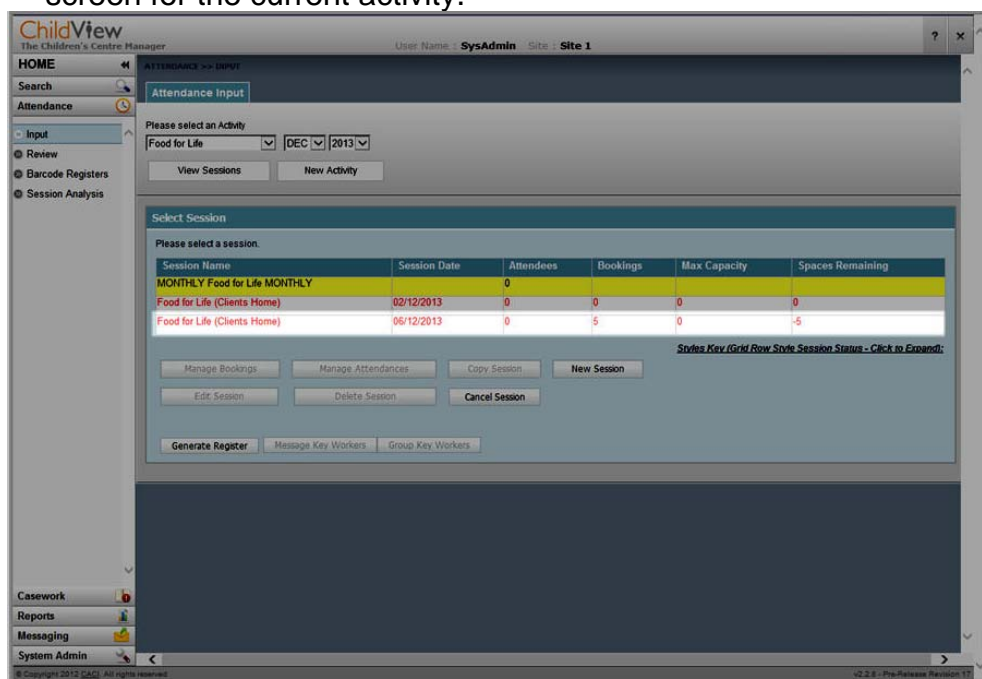


When an individual is clicked in the middle section, the bottom section will display any other individuals who are related to the selected individual, but don't live at the same address.





5. Within all 3 sections, individuals are booked into the session by ticking the selection box and pressing the Add button. If an individual appears in more than one section, the Add button will only add them once. Double clicking an individual will also book them into the session.
6. Should you make an error in your selection, select those names from the right hand side of the screen that should not be in the Results section and press the 'Remove' button. The 'Remove All' button will remove all people in the Results section.
7. Once all your people have been added to the Results section, pressing the 'Finish and go to menu' button will return you to the attendance input screen for the current activity.



8. Viewing individuals who have an attendance recorded on a session

Should you wish to view the names of those people who are actually booked on the session, select the session of interest from the summary page and press the 'Manage Bookings' button.

You will see a list of any individuals booked on the session on the right hand side of the screen.

1.5. Copying sessions

Rather than create a new session and input all the necessary criteria again it is possible to copy an existing session and specify the bits of information you wish to copy.

1. From the Side Menu, click the Attendance menu, then click the Input option. You will see a screen similar to this:

The screenshot displays the 'ChildView' software interface. On the left is a sidebar menu with options: HOME, Search, Attendance, Input (selected), Review, Barcode Registers, Session Analysis, Casework, Reports, Messaging, and System Admin. The main content area is titled 'ATTENDANCE >> INPUT' and 'Attendance Input'. It features a 'Please select an Activity' section with a dropdown menu and a date selector set to 'DEC' and '2013'. Below this are 'View Sessions' and 'New Activity' buttons. A 'Select Session' section with a 'Please select a session.' prompt is visible. The bottom of the screen shows a footer with '© Copyright 2012 G&Q All rights reserved' and 'v2.2.8 - Pre-Release Revision 13'.

2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.

- Clicking on the Session of that you wish to copy will enable the buttons at the bottom of the screen:

The screenshot shows the 'Attendance Input' screen in ChildView. A table lists sessions for 'Food for Life (Clients Home)'. The session dated '02/12/2013' is highlighted in yellow, and the 'Copy Session' button is enabled and highlighted in the bottom right of the table.

Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Food for Life MONTHLY		0			
Food for Life (Clients Home)	02/12/2013	0	0	0	0
Food for Life (Clients Home)	09/12/2013	0	0	0	0

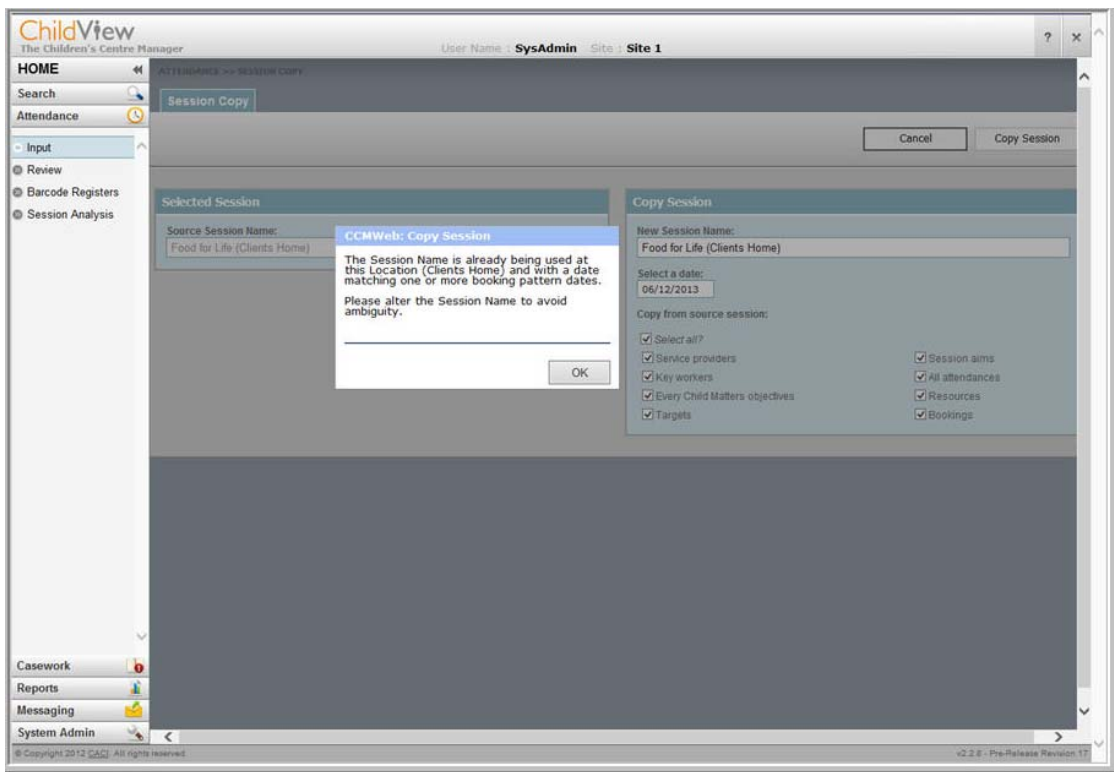
Pressing the 'Copy Session' button will open the following screen:

The screenshot shows the 'Session Copy' screen. It contains a 'Source Session Name' field with 'Food for Life (Clients Home)' entered. Below it, there's a 'New Session Name' field with 'Food for Life (Clients Home)' entered. A 'Select a date' field shows '02/12/2013'. Under 'Copy from source session', there are two columns of checkboxes, all of which are checked.

Copy from source session:	
<input checked="" type="checkbox"/> Select all?	<input checked="" type="checkbox"/> Session aims
<input checked="" type="checkbox"/> Service providers	<input checked="" type="checkbox"/> All attendances
<input checked="" type="checkbox"/> Key workers	<input checked="" type="checkbox"/> Resources
<input checked="" type="checkbox"/> Every Child Matters objectives	<input checked="" type="checkbox"/> Bookings
<input checked="" type="checkbox"/> Targets	

- You can now specify a new date for the session as well as specify which bits of information you wish to copy.
- Once you have done this press the 'Copy Session' button to create your new session.

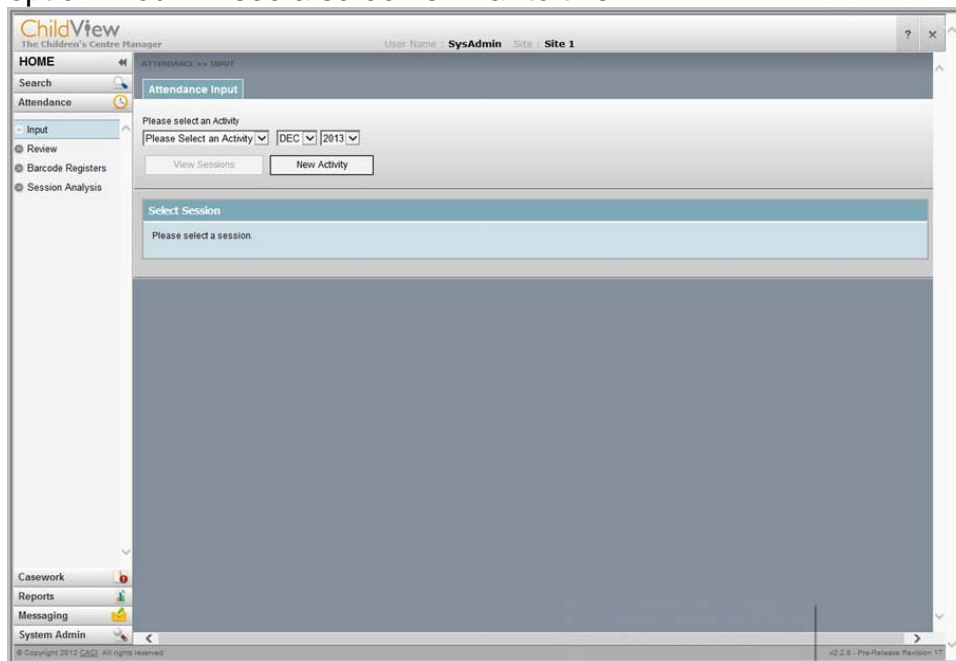
You will be warned if an existing session is already in the system for the new session date specified:



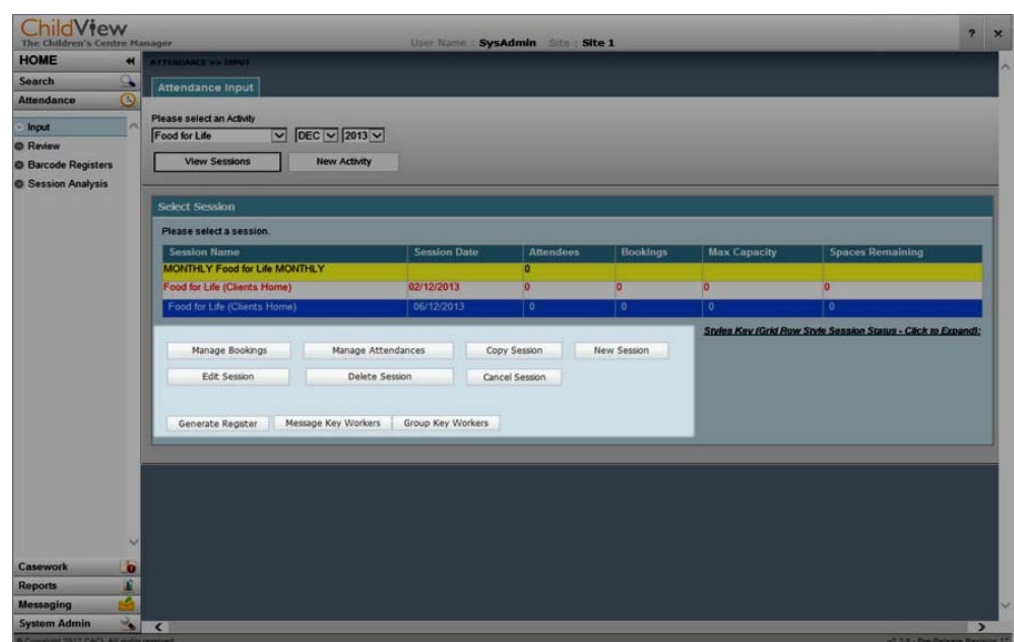
1.6. Editing sessions

It is possible to edit the details of an existing session.

1. From the Side Menu, click the Attendance menu, then click the Input option. You will see a screen similar to this:

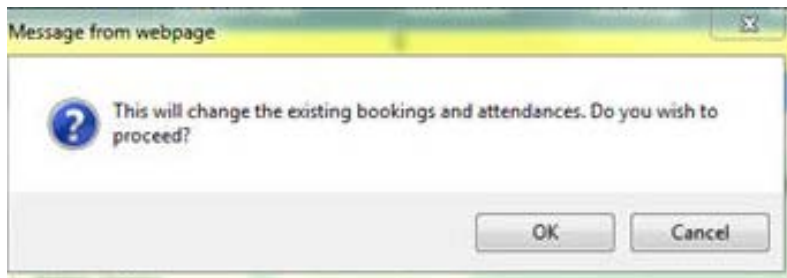


2. Select an Activity type from the drop down box along with the month and year the session is due to take place, and press the 'View Sessions' button.
3. Clicking on the Session of that you wish to edit will enable the buttons at the bottom of the screen:



Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Food for Life MONTHLY		0			
Food for Life (Clients Home)	02/12/2013	0	0	0	0
Food for Life (Clients Home)	06/12/2013	0	0	0	0

You will be prompted with the following dialog:



This informs you that any updates you make to the session details will filter through to any bookings or attendances already set up in the system.

Press the 'OK' button if you wish to proceed.

You will now be presented with the session details which can be viewed or modified as required.

1.7. Cancelling sessions

It is possible to cancel an existing session provided that it has no associated attendance records.

Note: you should record all planned sessions, and cancel them on the system if there were no session attendees.

1. From the Side Menu, click the Attendance menu, then click the Input option.
2. Select an Activity type from the drop down box along with the month & year the session is due to take place, and press the 'View Sessions' button.
3. Clicking on the Session of you wish to edit will enable the buttons at the bottom of the screen. Press the 'Cancel Session' button.
4. A screen similar to the following will be displayed:

ChildView
The Children's Centre Manager

User Name : SysAdmin Site : Site 1

HOME
Search
Attendance
Input
Review
Barcode Registers
Session Analysis

ATTENDANCE >>> CANCEL SESSION
CANCEL SESSION

Food for Life (Clients Home) Activity : Food for Life on : 17 Dec 2013 at : Clients Home

Pattern - Show/Hide Help Information -
☐ Cancel all in the pattern ☒ Cancel Selected sessions

	Date	From	To	Bookings	Key Workers
<input type="checkbox"/>	02 Dec 2013			0	0
<input checked="" type="checkbox"/>	17 Dec 2013			0	1

Notification / Reason - Show/Hide Help Information -
Reason for cancellation ☒ All Sites
Cancellation Category
☐ Notify Individuals ☐ Notify Key workers
Message: num chars remaining - 500
Food for Life Cancelled on: 17 Dec 2013; -

Casework
Reports
Messaging
System Admin

BACK CANCEL SESSIONS

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All session that have no associated attendances are listed and the selected session is ticked.

5. If the Cancel button is pressed without selecting a specific session, all sessions within the selected month that have no attendances will be included in the Cancel screen.

6. Select the session(s) that are to be cancelled, enter a new Reason for Cancellation or select an existing reason from current site records or from all sites, select a Cancellation Category from the drop down list and click Cancel Sessions.
7. The cancellation will be confirmed and the Attendance Input screen will be displayed with the cancelled sessions struck through.

ChildView
The Children's Centre Manager

User Name: SysAdmin Site: Site 1

ATTENDANCE >>> INPUT

Attendance Input

Please select an Activity
Food for Life DEC 2013

View Sessions New Activity

Select Session

Please select a session:

Session Name	Session Date	Attendees	Bookings	Max Capacity	Spaces Remaining
MONTHLY Food for Life MONTHLY		0			
Food for Life (Clients Home)	02/12/2013	0	0	0	0
Food for Life (Clients Home)	17/12/2013	0	0	0	0

Strikes Key (Grid Row) Strike Session Status - Click to Expand

Manage Bookings Manage Attendances Copy Session New Session

Edit Session Delete Session Cancel Session

Generate Register Message Key Workers Group Key Workers

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If the cancelled session is selected, the Cancel Session button will change to Activate Session.

Section 4: Individual full details

1.1. Individual full details

The Individual Full Details screen (shown either via the Family Search or People Search route) shows the majority of information held on that person. Selecting one of the tabs across the top of the screen will present you with information held about that person relevant to the selection made.

The screenshot displays the 'ChildView' software interface. On the left is a navigation menu with options: HOME, Search, Family, People, Add Family Wizard, Advanced Search, Service Providers, Mail Merge, and Data Extract. The main area is titled 'Individual Full Details' and shows a summary of a person's information: NAME: Master Henry Martin, DATE OF BIRTH: 27/04/2010, START DATE: 01/04/2010, ID: M000512, ADDRESS: 5 Parfield Close, Eastbourne, BN9 9YY, (South Side), and OPEN CASES: NONE. Below this is a tabbed interface with tabs for Requirements, Attendances, Referrals, Health, Custom, Nationality, Individual (selected), Personal Details, Notes, Child, Adult, Relationships, Barcodes, and Messages. The 'Individual' tab contains a form with fields for Title (Master), Forename (Henry), Middle, Surname (Martin), Known As, Gender (Male), Date of Birth (27/04/2010), Age (3), Status (Active), Start Date (01/04/2010), Telephone, Mobile, Email, and Message Preference. A notes section at the bottom indicates 'Notes : num chars remaining - 255'. At the bottom right are 'Cancel' and 'Save' buttons.

General information

The panel at the top of the screen shows general information about the individual and is displayed whichever tab has been selected:

This screenshot is identical to the one above, showing the 'ChildView' software interface with the 'Individual Full Details' screen. It displays the same navigation menu, summary information for Master Henry Martin, and the 'Individual' tab with its respective form fields and buttons.

Bread crumb

ChildView
The Children's Centre Manager

HOME >> SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS

Individual Full Details

NAME: Master Henry Martin
DATE OF BIRTH: 27/04/2010
START DATE: 01/04/2010
ID: M000512
ADDRESS: 5 Parfield Close, Eastbourne, BN9 9YV, (South Side)
OPEN CASES: NONE

Requirements Attendances Referrals Health Custom Nationality

Individual Personal Details Notes Child Adult Relationships Barcodes Messages

Individual

Title Master Forename Henry
Middle Surname Martin
Known As Gender Male

Date of Birth 27/04/2010 Age 3
Status Active Start Date 01/04/2010
Telephone Mobile
Email Message Preference
Notes : num chars remaining - 255

Cancel Save

The bread crumb allows for an easy way of navigating back to the page you were previously viewing - in this case clicking the 'Search People' link would reload the people search screen showing the filter criteria previously used along with the list of matching individuals.

Tabs

It is possible to add custom data fields to the Individual Full Details screen by using the windows version of the software. Please refer to your System Administrator should you need to capture additional information about individuals that is not catered for by default in the system. Such information can be set up in CCM Windows as Custom Fields and will show up in an 'Extended Fields' area at the bottom of each Tab (see example below).

ChildView
The Children's Centre Manager

HOME >> SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS

Individual Full Details

NAME: Master Henry Martin
DATE OF BIRTH: 27/04/2010
START DATE: 01/04/2010
ID: M000512
ADDRESS: 5 Parfield Close, Eastbourne, BN9 9YV, (South Side)
OPEN CASES: NONE

Requirements Attendances Referrals Health Custom Nationality

Individual Personal Details Notes Child Adult Relationships Barcodes Messages

Referrals

Referrals for: Henry Martin

#	Date	Who	Referred To	Referred By
No data to display				

Extended Fields

Extended Fields: Referrals

Additional Information

The tab options are:

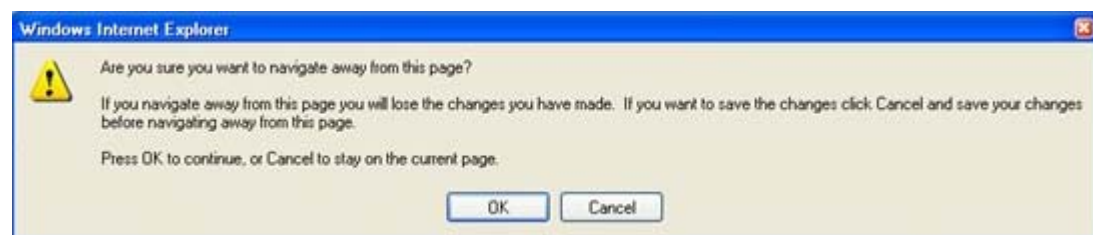
- Individual - overview of personal details
- Personal Details - in depth information
- Notes - both confidential and non-confidential in nature
- Child
- Adult
- Relationships.
- Barcodes - We will start using this in Summer 2014
- Requirements - information about disabilities and special needs
- Attendances
- Referrals
- Health
- Custom - this tab will show any custom fields that are not configured to show on the tabs mentioned
- Nationality
- Messages – We will start using this in Summer 2014

Depending upon your user rights you may or may not see all of these tabs.

Should you wish to edit any of the information held about that person, make the necessary changes, and ensure you press the 'Save' button at the bottom of the screen. The 'Save' button will save changes made in any of the tabs.

The 'Cancel' button will remove any changes you made in any of the tabs, provided you have not pressed the 'Save' button.

If you make changes, then move off of the Individual Full Details screen without pressing 'Save', you'll be asked to confirm the action:



Clicking 'OK' will take you to the selected screen, or 'Cancel' will restore the Individual Full Details screen so that you can save your changes.

1.2. Individual

This tab shows core information about an individual:

The screenshot displays the 'ChildView' software interface. The top navigation bar includes 'HOME', 'SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS', and user information 'User Name: SysAdmin Site: Site 1'. A left-hand menu lists various functions: Family, People, Add Family Wizard, Advanced Search, Service Providers, Mail Merge, and Data Extract. The main content area is titled 'Individual Full Details' and shows information for 'Miss Jade Samuels'. Key details include: NAME: Miss Jade Samuels, DATE OF BIRTH: 26/02/1998, START DATE: 01/01/2001, ID: SAM0162, ADDRESS: 36 Fieldside View, Eastbourne, BC21 2L2, (Outside SureStart), and OPEN CASES: NONE. Below this, a series of tabs are visible: Requirements, Attendances, Referrals, Health, Custom, Nationality, Individual (selected), Personal Details, Notes, Child, Adult, Relationships, Barcodes, and Messages. The 'Individual' tab contains a form with fields for Title (Miss), Forename (Jade), Middle, Surname (Samuels), Known As, Gender (Female), Date of Birth (26/02/1998), Age (15), Status (Active), Start Date (01/01/2001), Telephone (123456789), Mobile, Email (jsamuels@test.com), Message Preference, and a large text area for Sample Note. At the bottom right of the form are 'Cancel' and 'Save' buttons. The footer of the window shows '© Copyright 2012 CACI All rights reserved' and 'v2.2.8'.

Status

This field allows you to record the status of the individual in the Child's Centre. An Active setting can be used to indicate that the individual is currently using the centre's facilities. Should you need to classify somebody as deceased then it is recommended that you use the mortality section in the health tab to record this information as additional information can be captured at this time.

Notes

This field will allow you to store notes up to 255 characters in length. Should you need to store additional information (including confidential information) please use the extended notes functionality as described in Section 4 Individual full details, section 7.5.

Message Preference

This field is used to store the preferred method of messaging if known (Email or SMS). This feature will be available in Summer 2014.

1.3. Personal details

This tab shows in depth personal information about the individual e.g. registered status, consent information etc

The screenshot shows the 'ChildView' software interface. The top navigation bar includes 'HOME', 'SEARCH PEOPLE >> INDIVIDUAL FULL DETAILS', and user information 'User Name: SysAdmin Site: Site 1'. The left sidebar contains a menu with options like 'Family', 'People', 'Add Family Wizard', 'Advanced Search', 'Service Providers', 'Mail Merge', and 'Data Extract'. The main content area is titled 'Individual Full Details' and shows personal information for 'Miss Jade Samuels', including her date of birth (26/02/1998), start date (01/01/2001), ID (SAM0162), and address (36 Fieldside View, Eastbourne, BC21 2L2, (Outside SureStart)). Below this, there are tabs for 'Requirements', 'Attendances', 'Referrals', 'Health', 'Custom', and 'Nationality'. The 'Personal Details' tab is selected, showing fields for 'Identifying Details' (NH Number, NI Number, Registered, Local Indicator, Site Registered At, Main Correspondent), 'Consent' (Non CC Mail Shots, Photo Permission, Video Permission), and 'Verification' (Name Verified By, DOB Verified By, Gender Verified By, and their respective 'Verified On' dates). The 'Registered' checkbox is checked, and 'Site Registered At' is set to 'Site 1'. The 'Non CC Mail Shots' checkbox is also checked. The 'Verification' section has dropdown menus for 'Name Verified By', 'DOB Verified By', and 'Gender Verified By', all currently set to '[No Selection Made]'. The interface includes 'Cancel' and 'Save' buttons at the bottom right.

Registered

This field refers to whether the individual has returned a signed registration form.

Please note: This should not be ticked if you have received the family's details through the new birth data form. See Section 2: Search Menu, section 5.9 on adding new birth data.

Site Registered At

This field refers to the centre where the individual first registered at i.e. where they physically handed in their registration form.

Local Indicator

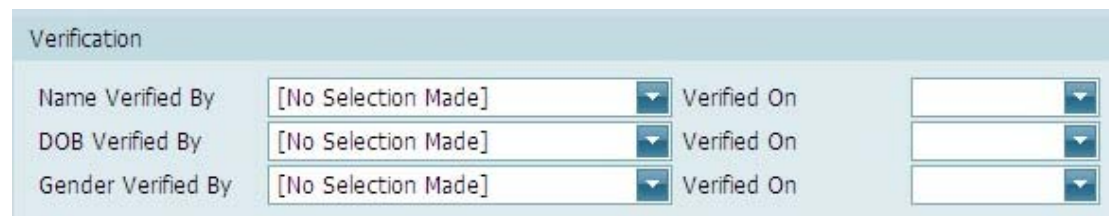
We do not use this indicator in Barnet.

Non CC Mail shots

It is a requirement of the Data Protection Act that you seek permission from the family before you or any other agency should contact them with information not directly relevant to the Children's Centre operation. Any individuals declining this permission must have this drop down set to no.

Verification fields

If a verification field has not been set you will see the following screen:



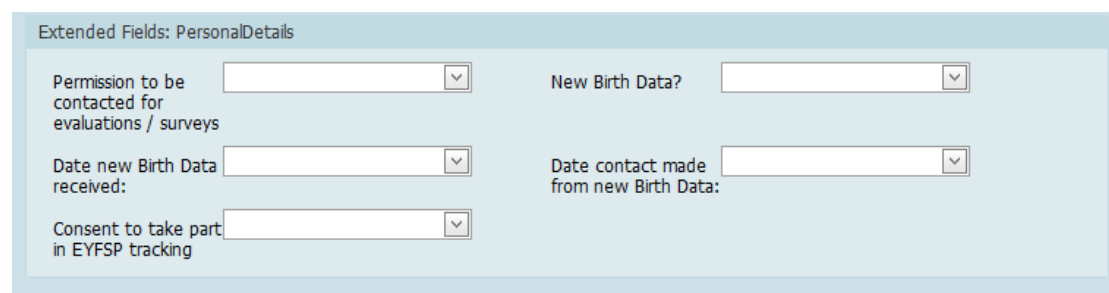
The screenshot shows a form titled "Verification" with three rows. Each row has a label, a dropdown menu, and a date field. The labels are "Name Verified By", "DOB Verified By", and "Gender Verified By". Each dropdown menu currently displays "[No Selection Made]". To the right of each dropdown is a date field with a dropdown arrow, each labeled "Verified On".

Click the applicable entry in the relevant drop down box as well as the date the verification took place. If you do not select a date then 'today's' date will be used.

Note: You are unable to delete a verification field once it has been entered on the system. However should the entry have been made in error you can select the 'None or Remote' option to indicate this.

Extended fields

The extended fields are local to the Barnet system.



The screenshot shows a form titled "Extended Fields: PersonalDetails" with six dropdown menus arranged in two columns. The left column contains: "Permission to be contacted for evaluations / surveys", "Date new Birth Data received:", and "Consent to take part in EYFSP tracking". The right column contains: "New Birth Data?", "Date contact made from new Birth Data:", and an empty field.

Please note: If you have received the family's details through the new birth data leaflet, the three new birth data fields should be completed. See Section 2: Search menu, section 6.9 on adding new birth data.

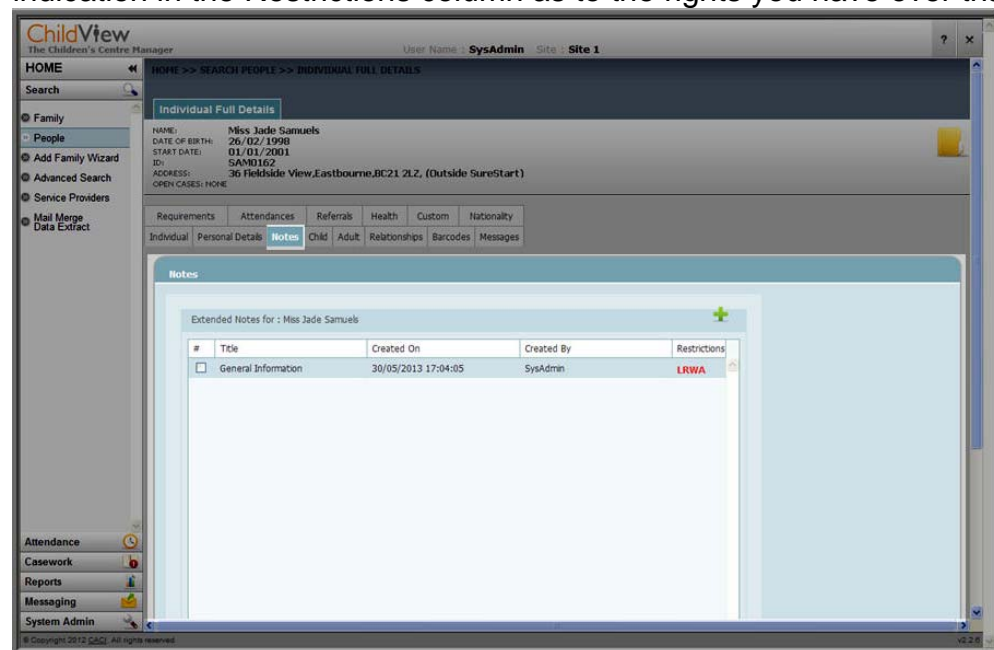
1.4. Notes

The Notes tab allows you to store information that exceeds the 255 character limit in the Notes section on the Individual and Personal Details tabs.

Notes can also contain formatting, for example different fonts, bulleted lists, URL Links etc.

It is also possible for you to make an extended note confidential in nature, and you can assign specific confidential permission groups the rights to access the confidential note.


Any extended note for an individual will show on the screen along with an indication in the Restrictions column as to the rights you have over that note:

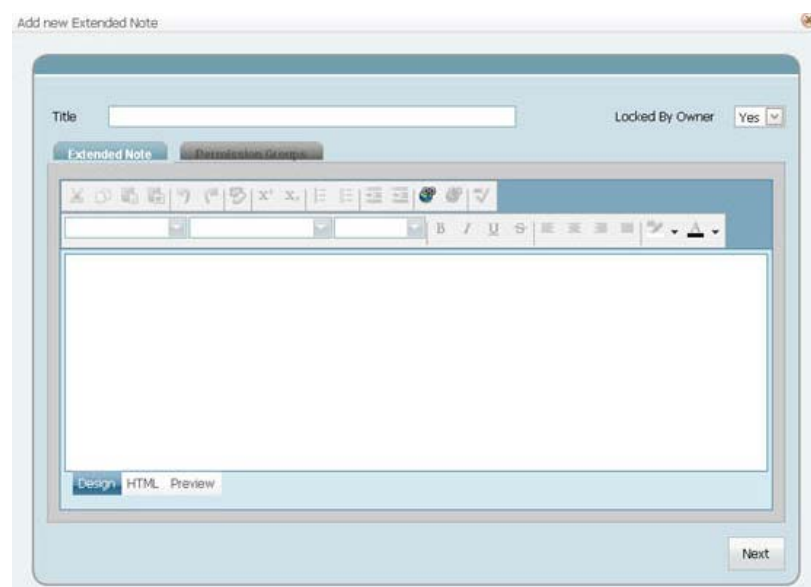


L = Locked by owner
 R = Read
 W = Write
 A = Archive

Clicking on the column headers will undertake A-Z, Z-A order of the information shown.

Adding a new extended note

To add a new extended note press the  icon which will display a screen similar to the following:



When recording the note title you should use the following format:

Note type – note subject – Children's Centre

For example:

Telephone call – Breastfeeding advice – Barnfield

This is to allow queries to be run on the reports.

Please note: Telephone calls and correspondence can be used to demonstrate sustained contact with families.

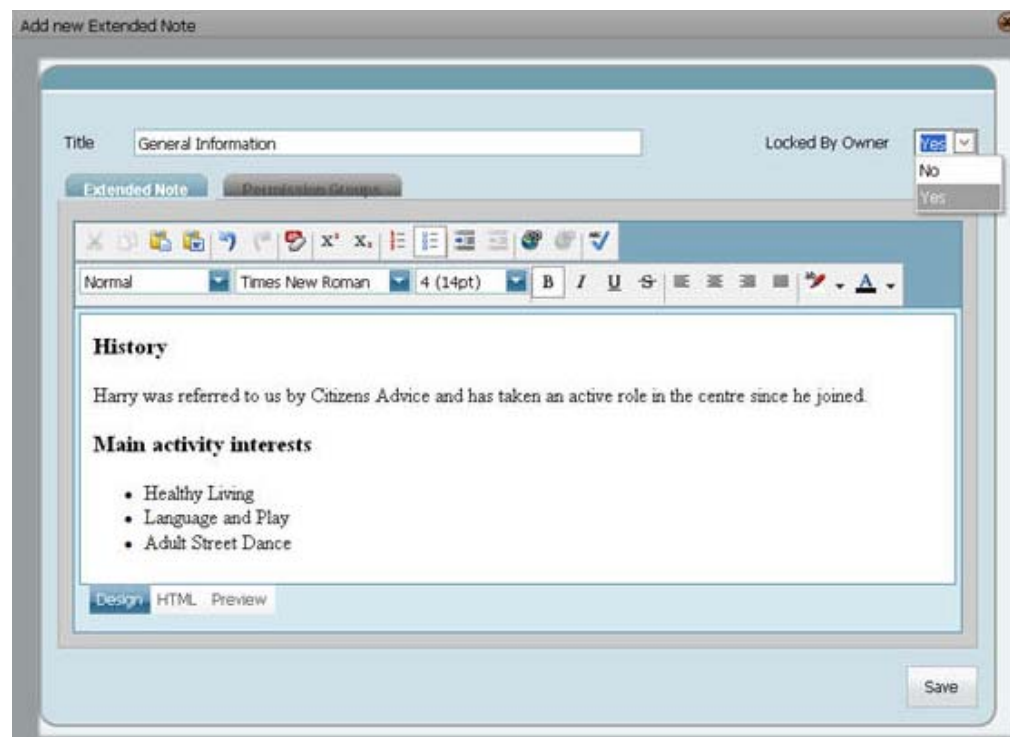
Note: The Permission Groups tab will only show if your user profile has the rights to create confidential notes.

You can now type in your text and format this as needed using the various icons that are presented.

For reference pressing the enter key will start a new paragraph of text. If you only wish to add a line break then press a combination of the shift key and enter.

Note: any images copied will not be saved in the database - the extended notes field is only relevant for textual information.

Should you wish to prevent other users from editing the text then set the 'Locked by Owner' drop down to Yes:

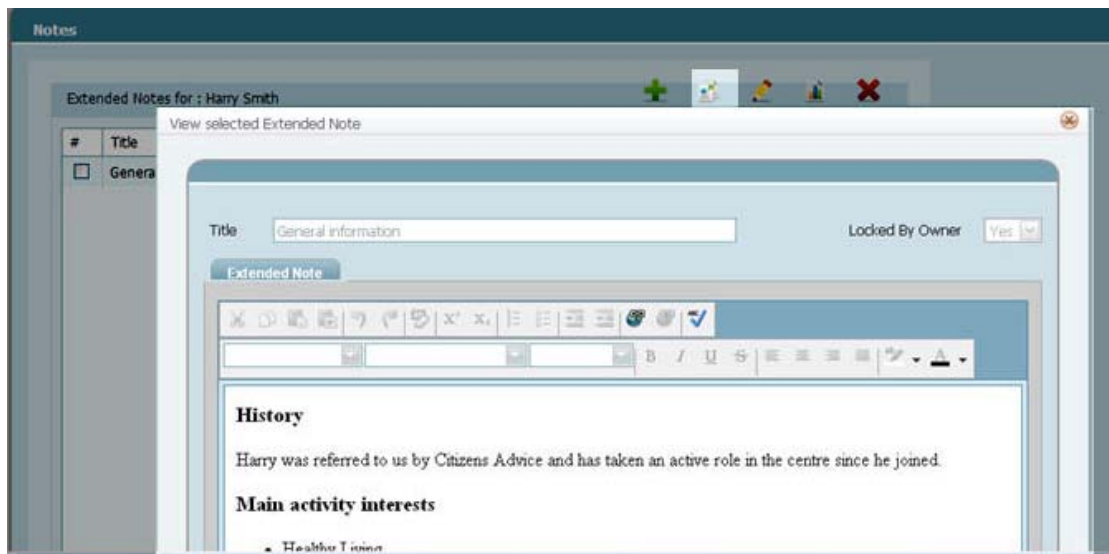


The screenshot shows a web application window titled "Add new Extended Note". It contains a form with the following elements:

- Title:** A text input field containing "General Information".
- Locked By Owner:** A dropdown menu currently set to "Yes", with options "No" and "Yes" visible.
- Extended Note:** A rich text editor with a toolbar showing various formatting options (bold, italic, underline, etc.). The editor contains the following text:
 - History**
 - Harry was referred to us by Citizens Advice and has taken an active role in the centre since he joined.
 - Main activity interests**
 - Healthy Living
 - Language and Play
 - Adult Street Dance
- Design HTML Preview:** A tabbed interface at the bottom of the editor.
- Save:** A button at the bottom right of the form.

Viewing a note

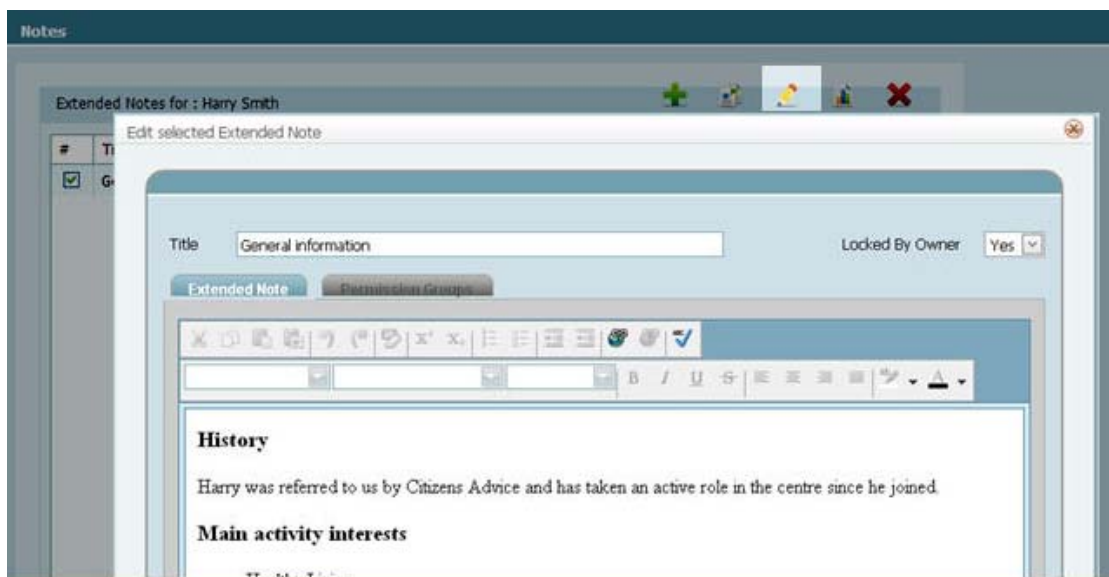
To view an existing note select the applicable entry in the extended notes grid and then click on the view extended note icon that will become available:



Note: If you wish to be able to click on the urls in the document then you need to ensure that the 'Preview' button at the bottom of the extended note dialog screen has been clicked.

Modifying a note

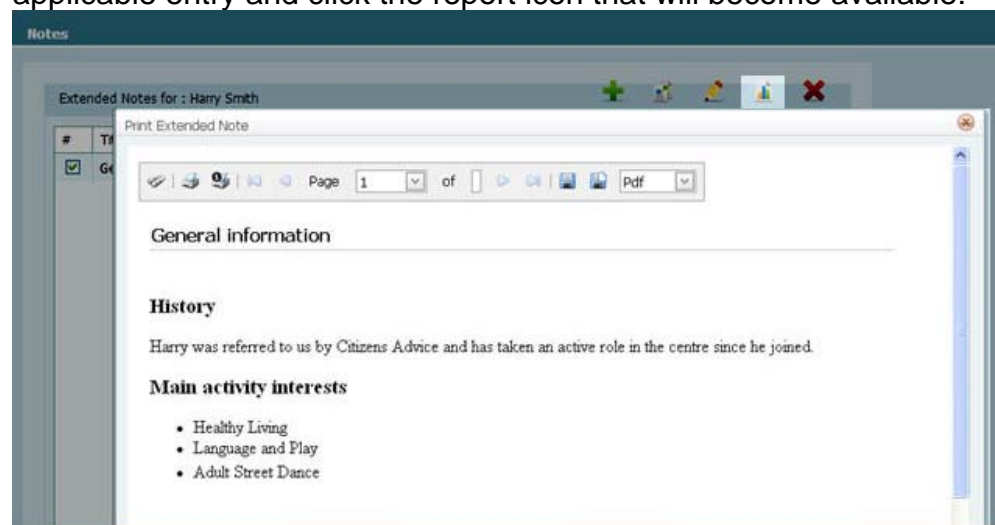
To modify an existing note select the applicable entry in the extended notes grid and then click on the modify extended note icon that will become available:



The note has not been locked by the owner the 'Save' button will be enabled which will allow you to save any changes made to the note.

Printing or saving a note

If you wish to print or save an extended note to your computer select the applicable entry and click the report icon that will become available:

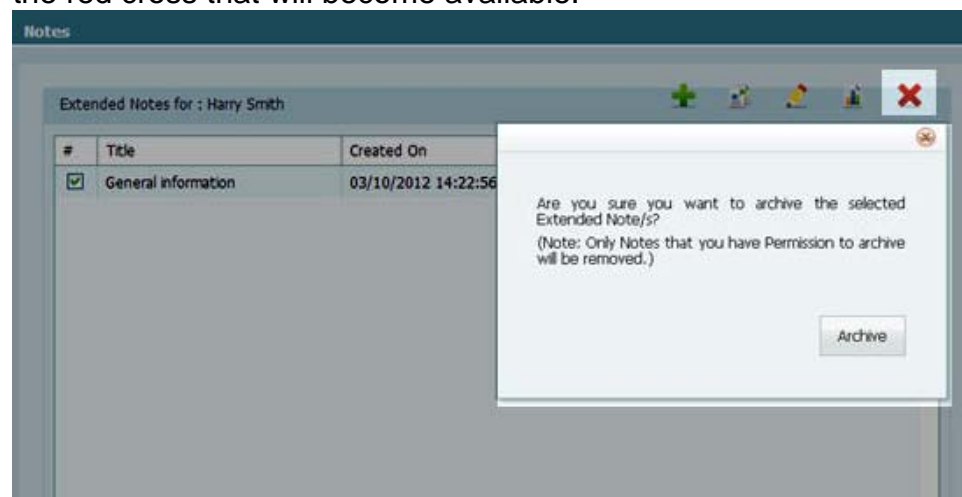


Once the Print Extended Note screen has shown press the relevant button in the toolbar at the top of the screen.

Archiving an extended note

You are unable to delete an extended note from the database, instead authorised users can archive an extended note.

If you wish to archive an extended note select the applicable entry and click the red cross that will become available:

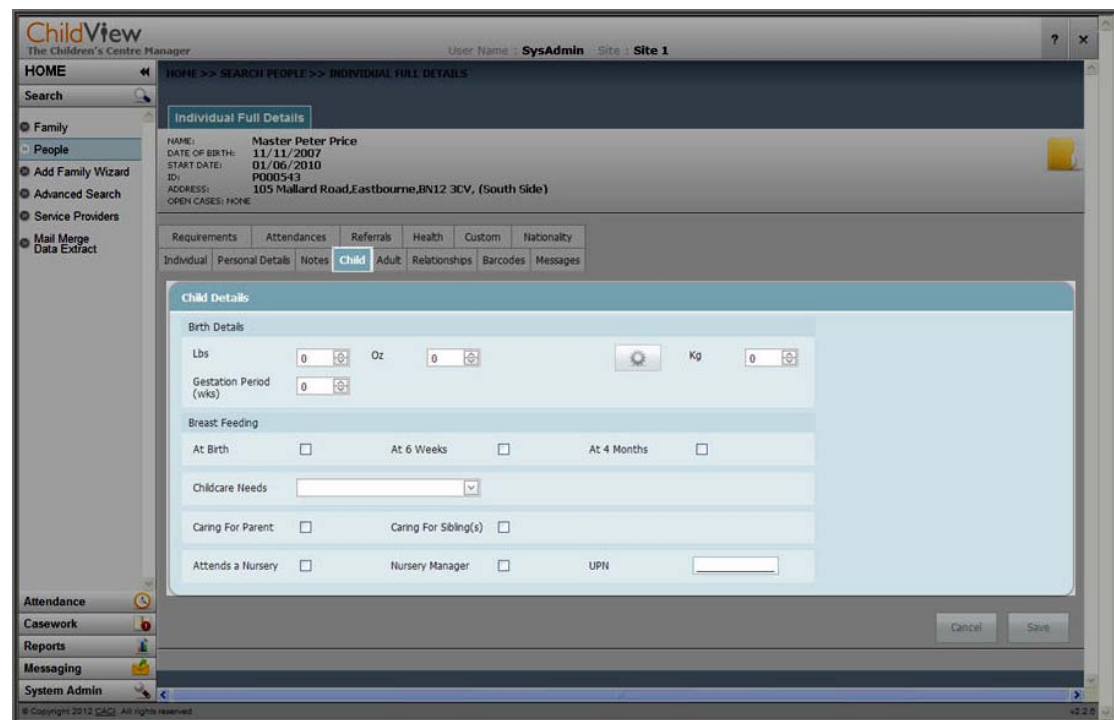


Once you have confirmed that you wish to archive the note nobody will be able to view it.

Note: If the note has been locked by the owner you will not be able to archive it.


1.5. Child tab

This tab provides information about a child's status i.e. birth, breastfeeding and childcare needs etc.



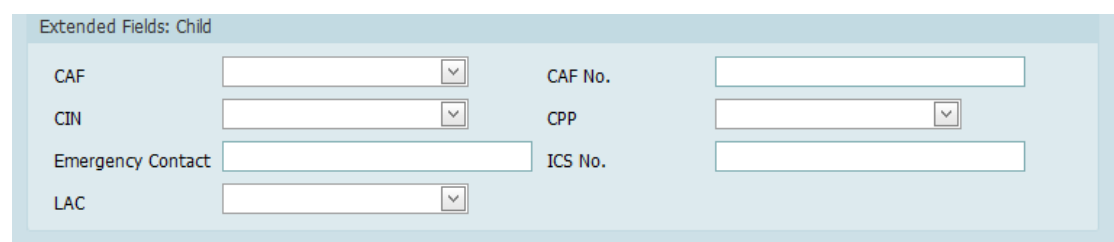
Birth Details

The database stores birth weight in Metric units (kg) and as such you need to ensure that the Kg field at the right of the screen has an entry.

If you only have English birth weight information then you can enter this in the relevant fields and click on the converter icon  to get an applicable entry in the Kg field.

Extended fields

The extended fields are local to the Barnet system.



Please note: CIN, CPP and LAC information feeds into performance reports.

1.6. Adult tab

This menu option shows general information about the status of an adult e.g. parent status, employment status etc. The fields shown will vary slightly according to gender of the individual.

The image below shows details for an adult male:

The screenshot shows the 'Adult Details' form for an adult male. The 'Adult' tab is selected in the top navigation bar. The form includes the following fields and options:

- Parent Or Carer:** ☒ (checked)
- Lone Parent:** ☒ (checked)
- Teenage Parent:** ☐ (unchecked)
- Smoker:** ☒ (checked)
- Employment:** (empty)
- Unique Tax Ref:** (empty)
- Driving Licence:** (empty)
- Electoral Role Ref:** (empty)

The image below shows the details for an adult female:

The screenshot shows the 'Adult Details' form for an adult female. The 'Adult' tab is selected in the top navigation bar. The form includes the following fields and options:

- Parent Or Carer:** ☒ (checked)
- Lone Parent:** ☐ (unchecked)
- Teenage Parent:** ☐ (unchecked)
- Pregnant:** ☐ (unchecked)
- Smoker:** ☒ (checked)
- Employment:** (empty)
- Unique Tax Ref:** (empty)
- Driving Licence:** (empty)
- Electoral Role Ref:** (empty)

Pregnant

Setting the pregnant drop down box to yes will cause the Due Date field to become visible:

The screenshot shows the 'Adult Details' form for an adult female with the 'Pregnant' field set to 'Yes'. The 'Adult' tab is selected in the top navigation bar. The form includes the following fields and options:

- Parent Or Carer:** ☒ (checked)
- Lone Parent:** ☐ (unchecked)
- Teenage Parent:** ☐ (unchecked)
- Pregnant:** ☒ (checked)
- Due Date:** (empty)
- Smoker:** ☒ (checked)
- Employment:** (empty)
- Unique Tax Ref:** (empty)
- Driving Licence:** (empty)
- Electoral Role Ref:** (empty)

You can either directly enter the due date in to the date field or use the calendar widget which will show if you click on the drop down arrow.

Extended fields

The extended fields are local to the Barnet system.

Extended Fields: Adult

Benefits

☐ Income Support (IS)
☐ Job Seekers Allowance (JSA)
☐ Employment and Support Allowance
☐ State Pension

Does anyone in your household smoke?

How did you hear about us?

Are you planning to breast-feed?

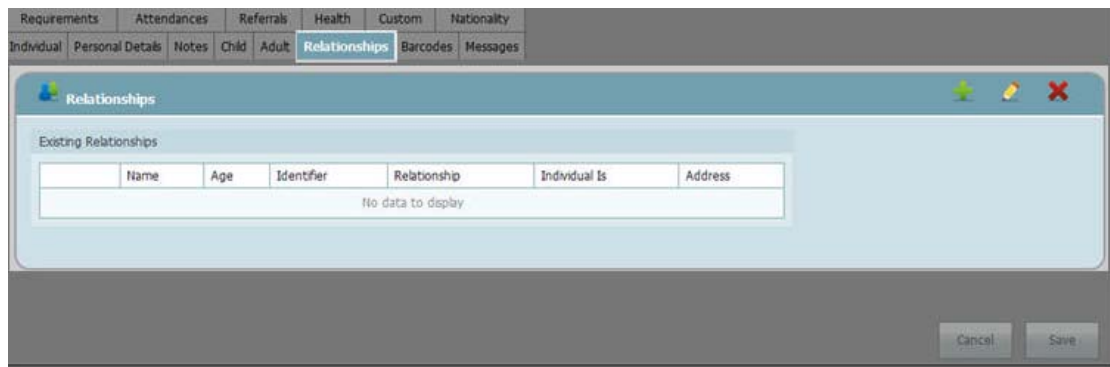
Registered Child Minder

Sexual Orientation

1.7. Relationships

This tab details any family relationships that may have been set (see Section 6: Add family wizard, section 6.5 for information on how to set up family relationships when individuals are entered in the database).


The screen shot below shows that no relationships have been set for the selected individual:

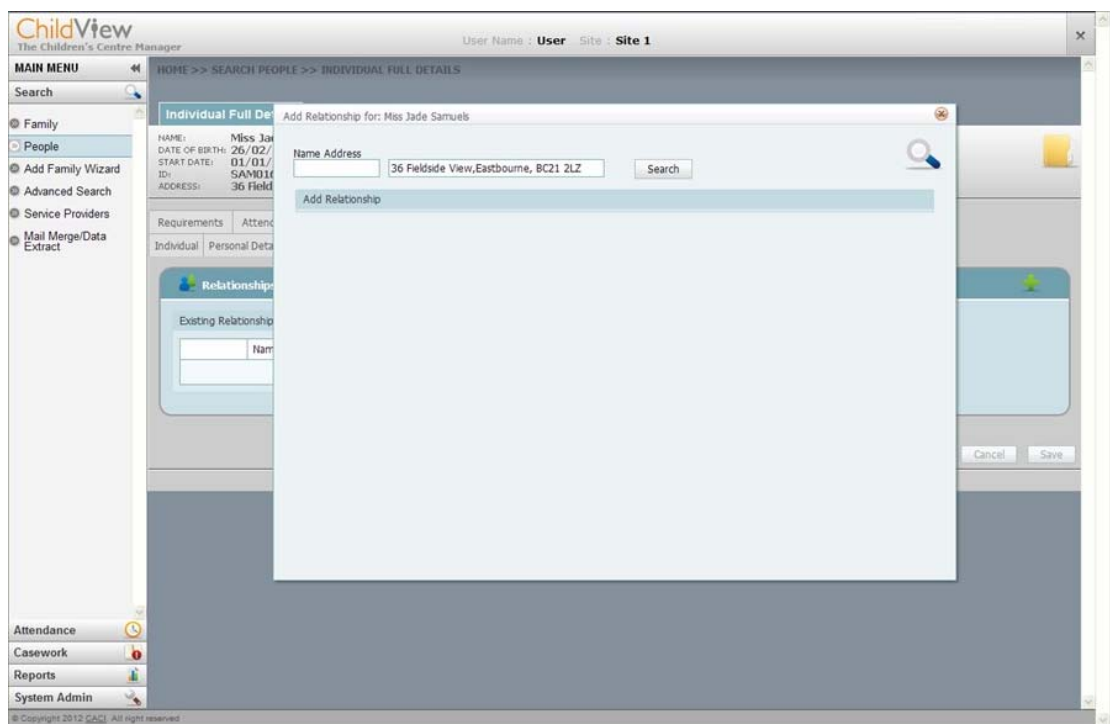


The screenshot shows the 'Relationships' tab selected in a software interface. The tab is part of a larger window with other tabs like 'Requirements', 'Attendances', 'Referrals', 'Health', 'Custom', 'Nationality', 'Individual', 'Personal Details', 'Notes', 'Child', 'Adult', 'Barcodes', and 'Messages'. The 'Relationships' tab contains a section titled 'Existing Relationships' with a table that has columns for Name, Age, Identifier, Relationship, Individual Is, and Address. The table is empty, displaying 'No data to display'. At the bottom right of the tab, there are 'Cancel' and 'Save' buttons.

Creating new relationships

For our example we wish to establish the relationship between Jade Samuels (the individual whose full details we are viewing) and her father Ruben

Samuels. Click the  icon to open the Add relationship screen:



The screenshot shows the 'Add Relationship' screen in the software interface. The screen is titled 'Add Relationship for: Miss Jade Samuels'. It has a search bar with the text 'Name Address' and a search button. Below the search bar is a table with columns for Name, Address, and a search icon. The table is empty. At the bottom right of the screen, there are 'Cancel' and 'Save' buttons. The background shows the 'Individual Full Details' screen with fields for Name, Date of Birth, Start Date, ID, and Address.

By default the address where the individual lives will populate the Address field. If the person we are setting up a relationship with does not live at the

same address you can enter alternative search criteria in the Name & / or Address field.

Press the 'Search' button to undertake a search. A number of names will now show on the screen if a match has been found:

The screenshot shows a window titled "Add Relationship for: Miss Jade Samuels". At the top, there is a "Name Address" section with a text input field containing "36 Fieldside View, Eastbourne, BC21 2LZ" and a "Search" button. Below this is a table titled "Add Relationship" with the following data:

	Name	Address	Date Of Birth	Identifier
	Drew Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jan 31 1977	SAM0160
	Jasmine Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 24 2000	SAM0163
	Louise Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Aug 9 1996	SAM0161
	Peter Smith	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 2 1973	S00352
	Ruben Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Apr 20 1980	SAM0164

Note: Searching will operate on a wild card basis on any word entered in the search box(es). For example searching for 'J Smith' will return a list of people where somebody has the letter J in their name and has the word Smith in their name

Select the individual you wish to establish a relationship with; in our case Ruben; and an Add Relationship section will now show on the screen:

The screenshot shows the same window as before, but with the "Select Relationship" section visible at the bottom. This section contains two dropdown menus: "Ruben Samuels is the" and "Miss Jade Samuels is the". A "Save" button is located at the bottom right.

Select the applicable entry from the left drop down box (in our case father) and the system will try and make a match in the second drop down box. Select the applicable entry:

Add Relationship for: Miss Jade Samuels

Name Address

Add Relationship

	Name	Address	Date Of Birth	Identifier
	Drew Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jan 31 1977	SAM0160
	Jasmine Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 24 2000	SAM0163
	Louise Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Aug 9 1996	SAM0161
	Peter Smith	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Jun 2 1973	S00352
	Ruben Samuels	36 Fieldside View Eastbourne Outside SureStart BC21 2LZ	Apr 20 1980	SAM0164

Select Relationship

Ruben Samuels is the Miss Jade Samuels is the

Pressing the 'Save' button confirms the relationship. You can then close the 'Add Relationship' screen if no other relationships needs to be added and view the relationships for the person:

Requirements Attendances Referrals Health Custom Nationality


Individual Personal Details Notes Child Adult **Relationships** Barcodes Messages

Relationships

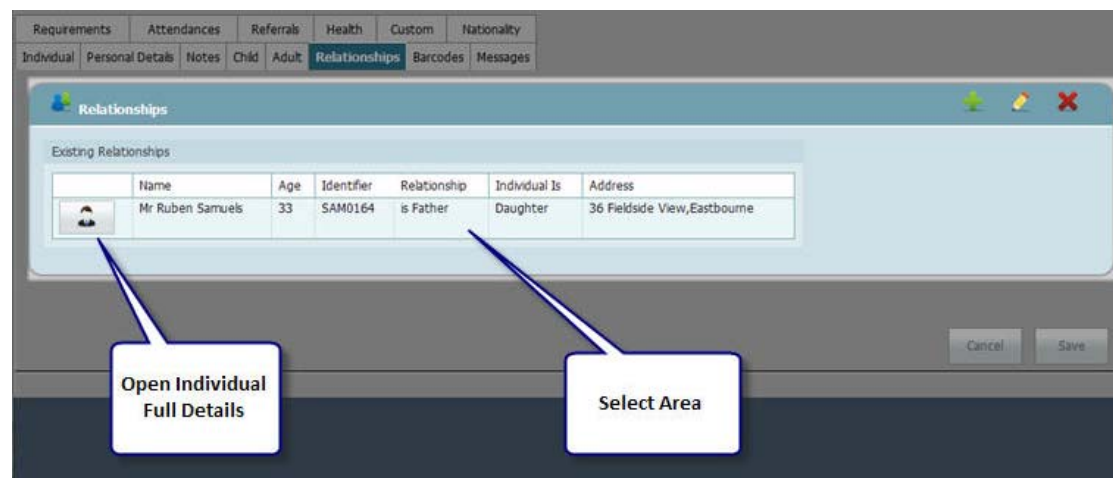
Existing Relationships

	Name	Age	Identifier	Relationship	Individual Is	Address
	Mr Ruben Samuels	33	SAM0164	is Father	Daughter	36 Fieldside View,Eastbourne

Editing relationships

If you wish to edit an existing relationship, click anywhere in the select area (see below) and an edit icon () will become available.

Clicking the Individual icon will open Individual Full Details for the selected individual.

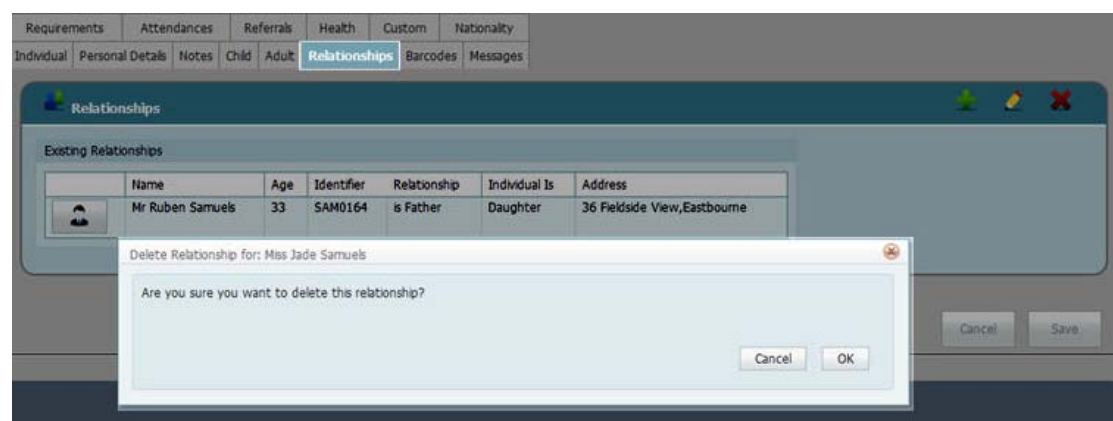


Pressing the edit icon will then open a dialog screen where you can change the existing relationship as required.

Deleting relationships

If you wish to delete an existing relationship then select the applicable entry

and a delete icon () will become available:



Click OK' to confirm that you wish to delete the relationship.

1.8. Requirements

Clicking on the Requirements tab allows you to view / modify any requirements for a person as shown below:

The screenshot shows a software interface with a top navigation bar containing tabs: Individual, Personal Details, Notes, Child, Adult, Relationships, Professionals, Barcodes, and Messages. Below this is a sub-navigation bar with tabs: Requirements, Attendances, Referrals, Health, Custom, and Nationality. The 'Requirements' tab is active, displaying a form titled 'Requirements'. The form has two sections: 'Disabilities' and 'Special Needs'. The 'Disabilities' section contains a list of checkboxes: Angelman's Syndrome, Arthritis, Asperger Syndrome, and Asthma. The 'Special Needs' section contains a list of checkboxes: Early Years Action, Early Years Action Plus, None, and School Action. At the bottom right of the form are 'Cancel' and 'Save' buttons.

To record a disability or special need against someone's record click on the check box next to the relevant entry. Un-tick the entry to remove a disability or special need.

1.9. Attendances

This tab details any activities that the individual has attended.

The screenshot shows the same software interface as above, but with the 'Attendances' tab selected in the sub-navigation bar. The 'Attendances' tab displays a table with the following data:

#	Activity	Date	Attendances	Location	Attended at Site	Session Name
	Bumps & Babies	01/10/2012	2		Site 1	

At the bottom right of the form are 'Cancel' and 'Save' buttons.

Clicking on the column headers will undertake A-Z, Z-A order of the attendance information shown.

1.10. Referrals

Clicking on the Referrals menu option will allow you to add referrals and record outcomes against referrals. Please refer to section 6: Referrals System for details on adding referrals.

The screenshot shows a software interface with a top navigation bar containing tabs: Individual, Personal Details, Notes, Child, Adult, Relationships, Barcodes, Messages, Requirements, Attendances, Referrals (highlighted), Health, Custom, and Nationality. Below the navigation bar is a section titled "Referrals" with a subtitle "Referrals for: Jade Samuels". To the right of the subtitle are a green plus icon and a small bar chart icon. Below this is a table with the following headers: #, Date, Who, Referred To, and Referred By. The table is currently empty, and the text "No data to display" is centered within it.


1.11. Health


This tab allows you to record health information e.g. are they a smoker, are they deceased, height & weight information etc.

The screenshot shows the "Health" tab selected in the software interface. The top navigation bar is the same as in the previous screenshot. The "Health" section contains several input fields and checkboxes organized into sections: "Body Mass" with fields for Stone, Lbs, Oz, Kg, Feet, Inches, M, and BMI, along with a "Calculate" button; "Diagnosed Obese" and "Activity Level" dropdown menus; "Allowed Plasters" and "Post Natal Dpn" checkboxes; "Blood Pressure" with fields for Systolic Hg, Diastolic Hg, and Pulse Per Minute; "Cholesterol" with fields for LDL and HDL; "Doctor" dropdown menu and "Family Doctor" button; and "Mortality" with a "Deceased" dropdown menu and a "Set as Deceased" button. At the bottom right of the form are "Cancel" and "Save" buttons.

Body Mass

The database will only accept Metric units for weight (Kg) and height (M) as such you need to ensure that the fields at the right of the screen have an entry. If you only have English weight / height information then you can enter

this in the relevant fields and click on the converter icon  to get an applicable entry in the Kg / M fields.

Once the weight and height information have been entered you can click the Body Mass Index (BMI) converter icon  to get a BMI entry.

Note: Although Metric weight & height information is stored in the database you will be able to view the English weight / height information in the respective fields when you view a person's Individual Full Details.

Doctor

This functionality has now been superseded by the professionals tab. See Section 4: Individual full details, section 1.14 for further information.

Mortality

Pressing the 'Set' button will change the deceased status to Yes. Some additional fields will also be displayed where you can capture additional information if needed:



Click the applicable entry in the relevant drop down box.

For the verified field you will also need to specify the date the verification occurred. If you do not select a date then 'today's' date will be used.

Note: You are unable to delete a verification field once it has been entered on the system. However should the entry have been made in error you can select the 'None or Remote' option to indicate this.

Once a person is classified as deceased then their status in the Personal Details tab will automatically change to deceased as well. Should the deceased status have been set in error then setting the status field to Active (or other suitable entry) will resurrect them.

Extended fields

The extended fields are local to the Barnet system.

Extended Fields: Health

Last asked about dentist:	<input type="text"/>	Date of Last Dental Check	<input type="text"/>
MMR1	<input type="text"/>	MMR2	<input type="text"/>
Registered with dentist?	<input type="text"/>		

1.12. Custom tab

This tab shows any custom fields that have been configured on the Barnet system. For example:

Individual | Personal Details | Notes | Child | Adult | Relationships | Professionals | Barcodes | Messages

Requirements | Attendances | Referrals | Health | **Custom** | Nationality

Custom Fields

Extended Fields: Misc

Would you be interested in any of the following:

- ☐ (001) A childcare place for you
- ☐ (002) Breast-feeding support
- ☐ (003) Help towards getting a job
- ☐ (004) Help with family issues at home

Cancel Save

1.13. Nationality

This tab allows you to record a person's nationality, ethnicity, asylum status etc.

Individual | Personal Details | Notes | Child | Adult | Relationships | Barcodes | Messages

Requirements | Attendances | Referrals | Health | Custom | **Nationality**

Nationality

Nationality

Ethnicity	<input type="text" value="White-British"/>	Religion	<input type="text"/>
English Spoken	<input type="text" value="Unknown"/>	Country of Origin	<input type="text"/>
Language Spoken	<input type="text" value="Unknown"/>	Family Language	<input type="text" value="Set"/>
Asylum Seeker	<input type="text" value="No"/>	Asylum Status	<input type="text"/>

Asylum

Port of Entry	<input type="text"/>	Date of Entry	<input type="text"/>
---------------	----------------------	---------------	----------------------

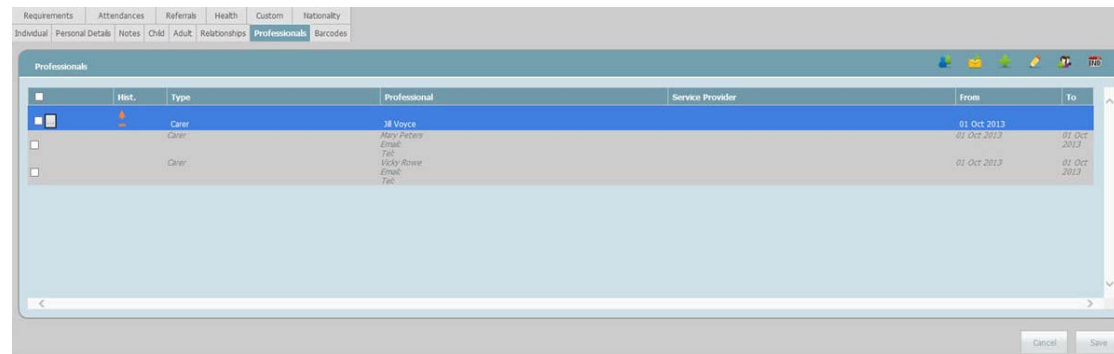
Cancel Save

Pressing the 'Set' button will set the entry in the Language Spoken field to be applicable to all people who live at the address. The change will only take place once the 'Save' button has been pressed.

1.14. Professionals

The Individual Full Details includes a tab for Professionals.

When the 'Professionals' tab is selected a screen similar to the illustration below is displayed. The functionality available here is exactly the same as described in Section 2: Search menu, section 3.1.1 for further information.



Hint	Type	Professional	Service Provider	From	To
	Carer	M. Joyce		01 Oct 2013	
	Carer	Mary Peters		01 Oct 2013	01 Oct 2013
	Carer	Vicky Rowe		01 Oct 2013	01 Oct 2013

Section 5: Archiving

1. Archiving introduction

Archiving is the method used within the database to 'de clutter' the records, so that only relevant, active families stay on view to the users.

Important note: archiving is carried out on a 'whole family' basis.

The database uses its convention of assuming that a Group of people who live at the same address are a 'family'. So, if there is a family of, say, 5 people at an address, and one child reaches an age that is too old to be caught in your children's centre 'umbrella', it is not possible to archive that child alone. The whole family would have to be moved to the archives, or else, the family needs to stay in the current records, despite the fact that one child no longer fits the criteria for membership of the children's centre. This ensures that users see the 'whole family picture'. There may still be children in the family who can attend the children's centre activities, and therefore, it would be useful for users to have as much information as possible to hand about that family unit.

All the information that is visible in the current view is visible in the archives.

Families that have been archived can be moved back into the current records easily. Therefore, if a new child is born in a family that has been archived, the whole family unit can be reinstated in the current records and the new child added.

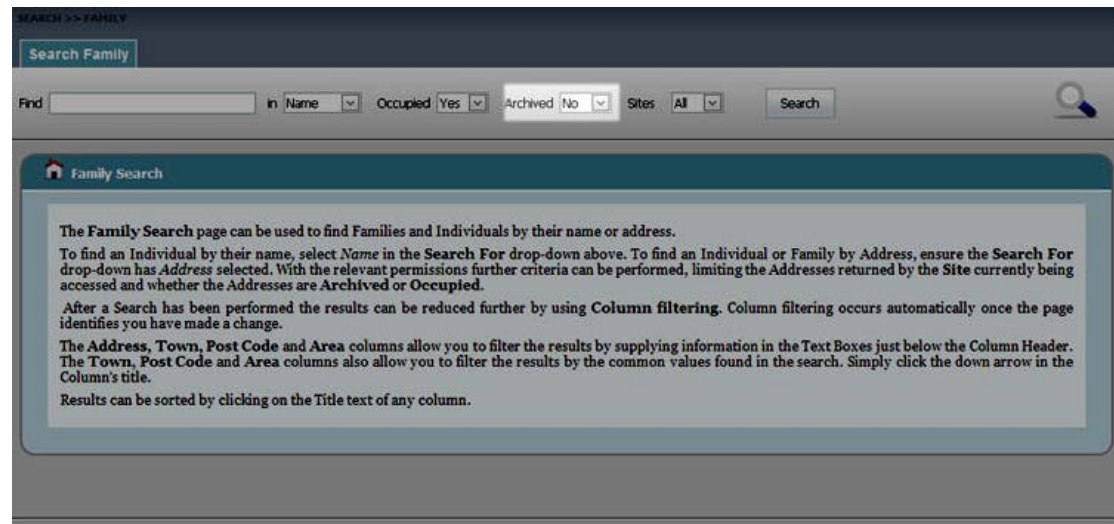
Search filters work the same, regardless of whether archived or non-archived options have been selected.

Please refer to section 5 in the CCM Framework for further information on archiving records.

2. Selecting non-archived or archived records

2.1. Family Search screen

From the Search / Family route, click on the Archived drop down box:

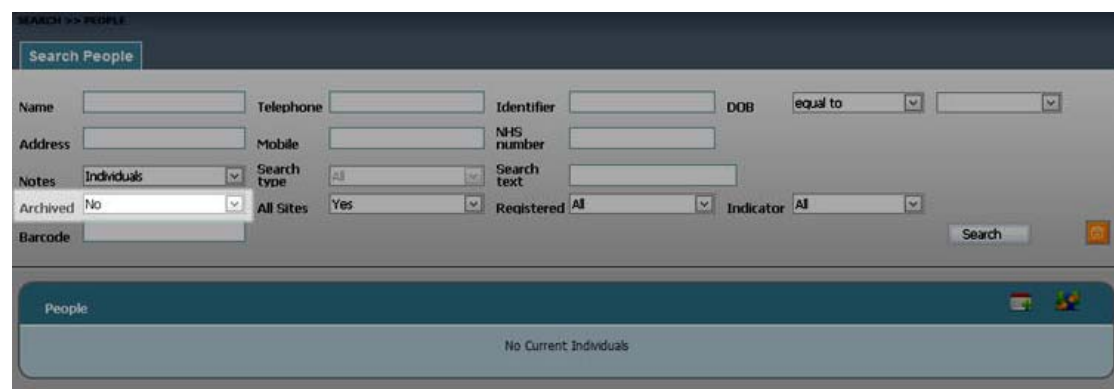


The screenshot shows the 'SEARCH >> FAMILY' interface. At the top, there is a 'Search Family' button. Below it, a search bar contains the text 'Find' followed by a dropdown menu set to 'Name'. To the right of the search bar are several filters: 'Occupied' (Yes/No), 'Archived' (No/Yes), and 'Sites' (All/None). A 'Search' button is located to the right of these filters. Below the search bar, there is a section titled 'Family Search' with a home icon. This section contains a text box with instructions: 'The Family Search page can be used to find Families and Individuals by their name or address. To find an Individual by their name, select Name in the Search For drop-down above. To find an Individual or Family by Address, ensure the Search For drop-down has Address selected. With the relevant permissions further criteria can be performed, limiting the Addresses returned by the Site currently being accessed and whether the Addresses are Archived or Occupied. After a Search has been performed the results can be reduced further by using Column filtering. Column filtering occurs automatically once the page identifies you have made a change. The Address, Town, Post Code and Area columns allow you to filter the results by supplying information in the Text Boxes just below the Column Header. The Town, Post Code and Area columns also allow you to filter the results by the common values found in the search. Simply click the down arrow in the Column's title. Results can be sorted by clicking on the Title text of any column.'

This drop down box determine if the search is to take place on those addresses that are archived (Archived = Yes), Un-archived (Archived = No) or both (Archived = All).

2.2. People Search screen


From the Search / People route, click on the Archived drop down box:



The screenshot shows the 'SEARCH >> PEOPLE' interface. At the top, there is a 'Search People' button. Below it, there are several search fields: 'Name', 'Telephone', 'Identifier', 'DOB', 'Address', 'Mobile', 'NHS number', 'Notes', 'Search type', 'Search text', 'Archived' (No/Yes), 'All Sites' (Yes/No), 'Registered' (All/None), and 'Indicator' (All/None). A 'Search' button is located to the right of these fields. Below the search fields, there is a section titled 'People' with a home icon. This section contains a text box with the text 'No Current Individuals'.

This drop down box determine if the search is to take place on those addresses that are archived (Archived = Yes) or un-archived (Archived = No).


A padlock icon will show in the search result grid indicating if the selected

person lives at an archived () or un-archived () address.

3. Moving families in and out of the archives


3.1. Using the family search screen

Archiving

1. Click on the 'Search' button in the Side Menu, then click the Family option.
2. Search for the address/family you would like to archive.
3. Click on the relevant address in the address result grid to select it.
4. Click on the open padlock icon () shown in the individual grid. The address (and therefore, its associated family) will be moved into the archived records, and the padlock icon will become closed.


Un-archiving

Should you need to reinstate the family in the active, current view of the database (for example if the family has had a new baby) then do the following:


1. Click on the 'Search' button in the Side Menu, then click the Family option.
2. Ensure the 'Archived' option is selected.
3. Search for the address/family you would like to un-archive.
4. Click on the relevant address in the address result grid to select it.
5. Click the closed padlock icon () shown on the individual grid. The address (and therefore, its associated family) will be moved into the current active records, and the padlock icon will become open.

3.2. Using the People Search screen

Archiving

1. Click on the 'Search' button in the Side Menu, then click the People option.
2. Search for the individual who lives in the family you would like to archive.
3. Click on the relevant individual in the search result grid to select them.
4. Click on the open padlock icon () shown in the search result grid. The address (and therefore, its associated family) will be moved into the archived records.

Un-archiving

1. Click on the 'Search' button in the Side Menu, then click the People option.
2. Search for the individual who lives in the family you would like to un-archive.
3. Click on the relevant individual in the search result grid to select them.
4. Click on the open padlock icon () shown in the search result grid. The address (and therefore, its associated family) will be moved into the current active records.

Section 6: Referrals system

The Referrals System allows you to record and monitor information about people who have been referred to Key Workers, Activities and other Services (including services that are external to your Children's Centre Programme).

Please note: Referrals to FEE2, EYVF, Health Visitors for MMR1 & MMR2 and Smoking Cessation Clinic are all performance indicators and are used in reporting.

1.0 Viewing referrals for an individual

You can view referrals for individuals by doing the following:

1. Bring up the Individuals Full Details screen (see Section 2: Search menu and either the Family Search or People Search topics on how to do this).
2. Select the Referrals tab option to be presented with the following:




Any referral(s) logged against the selected person will now be displayed.


2.0 Viewing referrals for a family

You can display a list of all of the referrals associated with a household by doing the following:

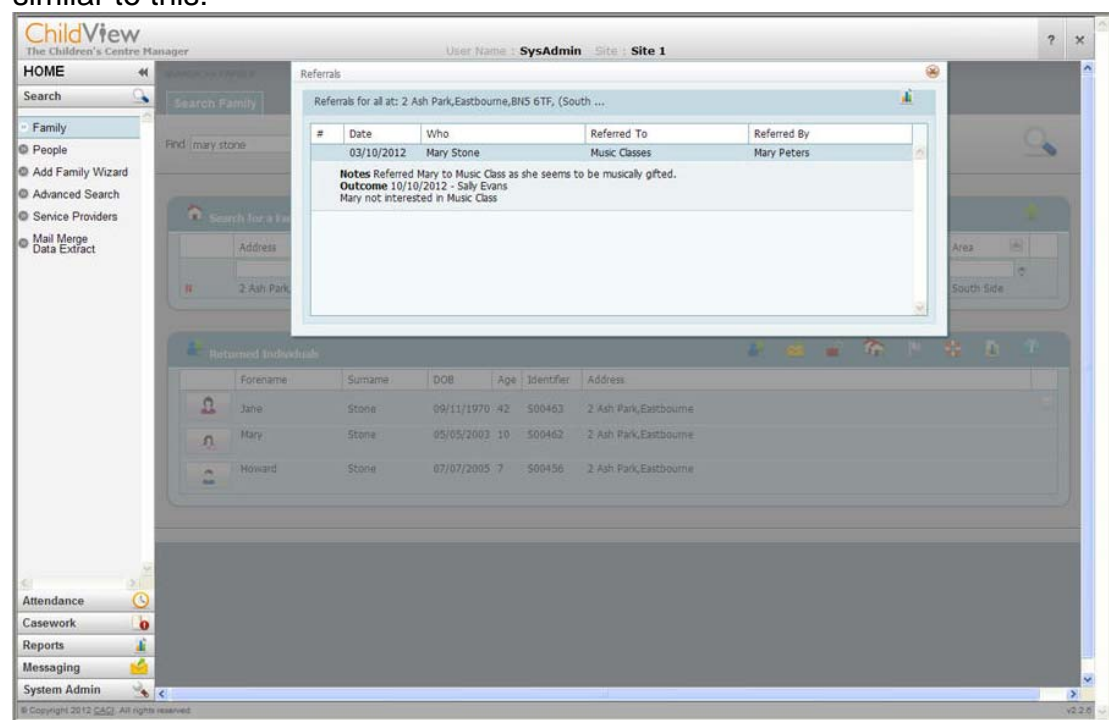
2.1. Via Family Search

1. Click on the Search button in the Side Menu, then click the Family option.
2. Search for the address/family for which you would like to see referrals.
3. Click on the relevant address in the address result grid to select it.
4. Click on the 'Family Referrals' icon () that will show in the individual grid.

2.2. Via People Search


1. Click on the Search button in the Side Menu, then click the People option.
2. Search for the address/family for which you would like to see referrals.
3. Click on the an individual who lives at the address you are interested in to select it.
4. Click on the 'Family Referrals' icon () that will show in the individual grid.

If referrals are in place for any person in that household, you will see a screen similar to this:



3.0 Adding referrals

Referrals are always associated with a single individual and are therefore added to the system within the Referrals tab of the Individuals Full Details screen.

1. Navigate to the individual that you wish to add a referral against and view their Full Individual details (see Section 2: Search menu and either the Family Search or People Search topics on how to do this). Select the Referral tab.
2. Click the  icon to open the Add new Referral screen.

The screenshot shows a software interface with a top navigation bar containing tabs: Individual, Personal Details, Notes, Child, Adult, Relationships, Barcodes, Messages, Requirements, Attendances, Referrals (selected), Health, Custom, and Nationality. Below this, the 'Referrals' section is titled 'Referrals for: Jade Samuels'. It features a table with columns: #, Date, Who, and Ref. The table is currently empty, showing 'No data'. Below the table is an 'Extended Fields' section with 'Extended Fields: Referrals' and 'Additional Information'. An 'Add new Referral' dialog box is open in the foreground. It contains the following fields: 'Refer To' (Key Worker), 'By' (Gwenda Maughan), 'Date' (31/05/2013), and 'Notes : num chars remaining -'. There are 'Cancel' and 'Save' buttons at the bottom of the dialog.

Refer To

Referrals can be made to either a Key Worker in the programme, a particular Activity, or to a Service. Select the type of referral you wish to make and the drop down list directly below is automatically refreshed with the appropriate options. Select the appropriate item from the drop down list. In this example, we have referred our individual (Reg Harris) to an Activity called Singing Lessons.

By

Every referral must be made by someone. The list that appears in this drop down arrow is the same list as the Key Workers list that will have been created by your system administrator.

Date

Click in the calendar icon located at the right of the date input field, and a calendar will show allowing you to specify the date that the referral was created. This should be set to 'today's' date as it is the start date of the referral and, once set, should not be amended by anyone editing the referral in the future. You can also type in the date if you do not wish to use the calendar.

Notes

This section is intended for you to capture information about why the referral is taking place.

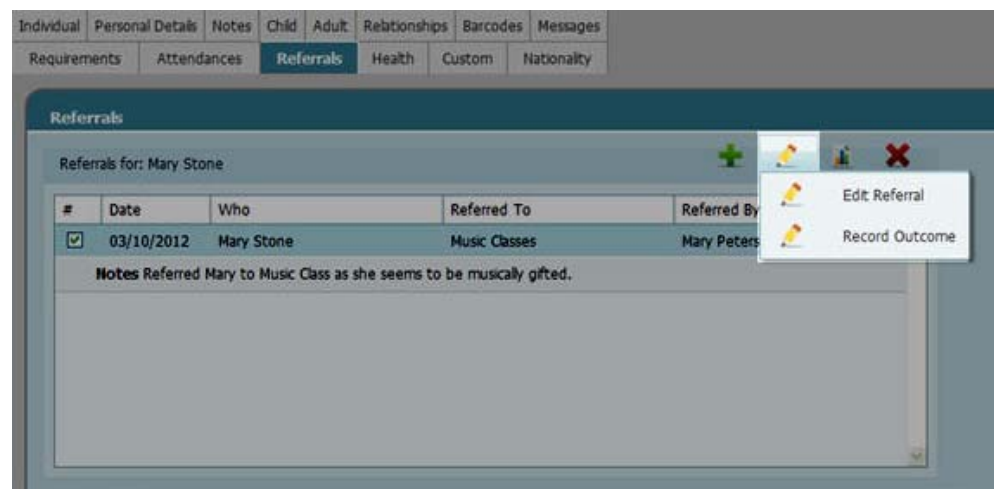
4. When you have completed all the fields mentioned above press the 'Save' button.

4.0 Editing referrals

You can update an existing referral at any time, up until the point that it has an outcome logged against it. Once an outcome is confirmed, referrals are locked (and cannot be further amended), so that any reports and statistics are safe. Referrals can be edited either via the Family search screen, the People search screen or via a persons Individuals Full Details.

To update a referral:

- Click on the 'Family Referrals' icon located in the individual grid of the family search screen once an address has been selected, select a person who lives at the address of interest in the People search screen, or navigate to the referral tab in the person's Individual Full Details.
- Click on the check box located at the left of the referral item, to select it.
- Hover over the pencil icon that will now become visible and select the Edit Referral option that shows in the pop up menu:



- You will then be presented with a screen similar to the following:

- In the Notes field, you can update the previous comments. Do not change the entry in the Date field as that is the date the referral was first raised. You could, instead, type a date in the notes area, as shown above:
- Once you have modified your notes press the 'Save' button to confirm your changes.

5.0 Recording outcomes

When the reason for the referral has been resolved, you can allocate an outcome to it. Once an outcome is confirmed, referrals are locked (and cannot be further amended), so that any reports and statistics are safe.

Outcomes can be recorded via the Individuals Full Details screen, from the Family search screen or from the People search screen.

5.1. Record an outcome

- Click on the 'Family Referrals' icon located in the individual grid of the Family search screen once an address has been selected, select a person who lives at the address of interest in the People search screen, or navigate to the referral tab in the person's Individual Full Details.
- Click on the referral item, to select it.
- Hover over the pencil icon that will now become visible and select the Record Outcome option that shows in the pop up menu:



- You will then be presented with a screen similar to the following:



A screenshot of a 'Record Outcome' dialog box. It features a 'Confirmed By' dropdown menu with 'Sally Evans' selected. Below it is a 'Notes' text area with the text 'Mary not interested in Music Class' and a character count 'Notes : num chars remaining - 221'. At the bottom, there is a 'Date' dropdown menu with '31/05/2013' selected. 'Cancel' and 'Save' buttons are at the bottom right.

Confirmed By

Every outcome must be confirmed by someone. The list that appears in this drop down arrow is the same list as the Key Workers list. This list will have been created by your system administrator.

Notes

Type explanatory notes to explain the outcome.

Date

Choose the date of the outcome by clicking on the calendar icon or manually typing in the date.

- Click the 'Save' button. You will be prompted to confirm that you wish to record the outcome as Referral cannot be edited or removed once an outcome has been added. Press the 'Save' button to confirm the outcome.
- The outcome will then appear in the referral summary table:



A screenshot of the 'Referrals' section in a software interface. The top navigation bar includes tabs for 'Individual', 'Personal Details', 'Notes', 'Child', 'Adult', 'Relationships', 'Barcodes', and 'Messages'. Below this, a sub-navigation bar has 'Requirements', 'Attendances', 'Referrals' (highlighted), 'Health', 'Custom', and 'Nationality'. The main area is titled 'Referrals for: Mary Stone' and contains a table with the following data:

#	Date	Who	Referred To	Referred By
	03/10/2012	Mary Stone	Music Classes	Mary Peters

Below the table, there is a section for 'Notes' and 'Outcome':

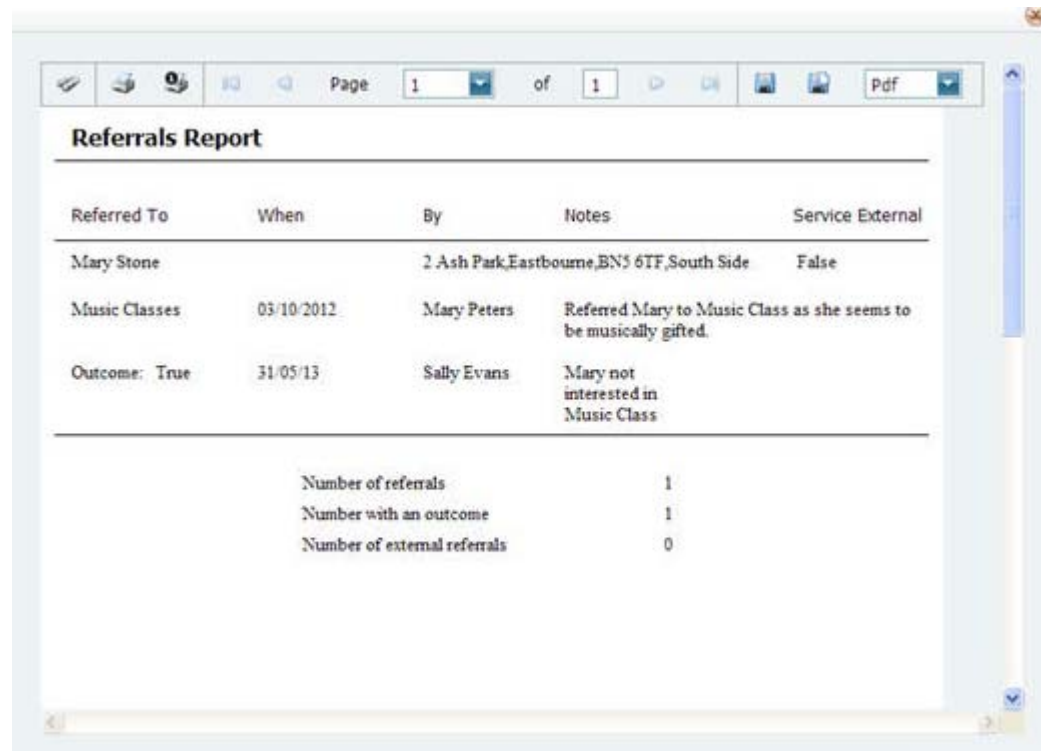
Notes Referred Mary to Music Class as she seems to be musically gifted.
Outcome 31/05/2013 - Sally Evans
 Mary not interested in Music Class

6.0 Referral reports

On the individual grid in both the Family search and People search screens, and also the referral tab of an Individuals Full Details is a referral report icon



If you click that icon, a printable list of those referrals will be displayed in a separate window:

A screenshot of a web application window titled 'Referrals Report'. The window has a toolbar at the top with icons for print, save, and other functions, along with a page indicator showing 'Page 1 of 1' and a 'Pdf' button. The main content area contains a table with the following data:

Referred To	When	By	Notes	Service External
Mary Stone		2 Ash Park, Eastbourne, BN1 6TF, South Side		False
Music Classes	03/10/2012	Mary Peters	Referred Mary to Music Class as she seems to be musically gifted.	
Outcome: True	31/05/13	Sally Evans	Mary not interested in Music Class	

Below the table, there is a summary section with the following data:

Number of referrals	1
Number with an outcome	1
Number of external referrals	0

The people included in the report will vary according to which screen you created the report from. If you created the report from the Family Search or People Search screen then all referrals for the family will be included. If you created the report from an Individuals Full Details only their details will be included.