



# Early Years Child Development App

## Front Line Administrators

Please read the separate help guides on **'Managing Child Profiles'** and **'Working With Forms'**. They cover the content found in the **Children** menu which is also applicable to Health Visitors and Health Visitor Managers.

This particular help guide covers additional functionality available in the Administrator view:

- + Teams menu – view/edit team details, add/remove Health Visitors assigned to a team and view the children in their caseload, create a new team (pg 2-3)
- + Users menu – view and edit profiles for carers and health professionals and deactivate accounts (pg 4-5)
- + Create User menu (pg 6-7)
  - create new profiles for carers
  - process to follow to get new staff members access to Early Years

### Dashboard



- There is no information displayed on the Dashboard in the Administrator view
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### Children menu



- See the separate help guides on **'Managing Child Profiles'** and **'Working With Forms'**, which cover content in the **Children** menu and show you how to:
    - Search for children; view and edit child profiles
    - Add new child profiles
    - Assign carers and Health Visitors to a child
    - Close and re-open a case
    - View and complete assessment forms
    - Add case notes to a child's profile
    - Export child and form data
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### Guidance menu



- Contains video content for parents and carers. Staff can also access the content in order to direct parents to appropriate videos.
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## Teams menu Teams

- This section enables you to view/add/remove Health Visitors assigned to a team and view the children assigned to Health Visitors.

### View team details and a list of Health Visitors assigned to a team

- ➔ From the Teams menu select **Details** next to the team you want to view more information for

#### List of teams

Name	Manager	Locality	Members	
Broughton	Faye Winter	Bury	4	<a href="#">Details</a>

Summary details for the team are displayed, followed by a list of Health Visitors assigned to that team.

### Edit team details

- ➔ From the Teams menu select **Edit** next to the team you want to edit details for e.g. to change the Team Manager

Name	Manager	Locality	Members	
Epsom	Holly Fielding	Surrey	3	<a href="#">Details</a> <a href="#">Edit</a>

### View a list of children assigned to a Health Visitor within the team

- ➔ Within the Team Details page select **Display children** next to the Health Visitor's name

Steven Barker	344556664 4	carly.appleby @gmtogether. org	1	<a href="#">Display children</a> <a href="#">Remove member</a>
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The List of Children page will open with the children who are assigned to that Health Visitor. You can select a child's name to view their profile.

### Remove a Health Visitor from a team

- ➔ Within the Team Details page select **Remove member** next to the Health Visitor's name

Steven Barker	344556664 4	carly.appleby @gmtogether. org	1	<a href="#">Display children</a> <a href="#">Remove member</a>
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A Confirmation pop up box appears asking you to confirm that you definitely want to remove the Health Visitor from that team.

The Health Visitor's profile remains in the application but they will no longer be assigned to that team and any children who were in their caseload will now be re-assigned to the locality.

## Assign an existing Health Visitor to a team

N.B. Before you can assign a Health Visitor to a team they will first need to be set up as a user in the application. Go to the **Create User** menu to create their profile if one doesn't already exist.

- ➔ Within the Team Details page select **Assign new member** at the top right of the screen

**Assign new member**

- ➔ Enter the Health Visitor's name in the search field and select **Assign** next to their name

Name	Phone number	Email	Working from	Working to	Children	
Marie Oaks	078344543	anne.winkley@gmt ogether.org			2	<b>Assign</b>

A Confirmation pop up box appears asking you to confirm that you definitely want to assign the Health Visitor to that team.

N.B. A Health Visitor Manager can only be assigned to a team from their user profile in the Users menu.

## Create a new team

- If you need to create a new team or edit team details (e.g. the team name), raise a request with your local IT Service Desk. They will forward the request to the system administrators who can carry out this task. The information you'll need to provide to your local IT Service Desk is:

Request for creation of new team	
Team name	
Locality	
Manager name	
Office address of team	
Team email address (put n/a if not applicable)	
Office phone number for team	

## Users menu



- This section allows you to view, edit and de-activate profiles for carers, Health Visitors, Health Visitor Managers and Administrators within your locality.

### View and edit staff and carer profiles

- ➔ To search for a user enter their name in the search field and the search results will automatically display any matching users.

List of users Create user

Search

Role

Active

Full name	Login	Role	Last login	Active	Actions
Barbara Hope	bhope@gse.com	Team Manager		Yes	<a href="#">Deactivate</a>

You can also search by user role by selecting from the **Role** drop down list, or select from the **Active** drop down list to view active/inactive accounts

Role

Active

Carer  
Health Visitor  
Team Manager  
Administrator

Active Actions

- ➔ To open their profile select the user's record from the search results
- ➔ You can edit any fields in the profile if required and at the bottom of the form select **Save** or select **Cancel** to return to the search results

### De-activate user accounts

- Users have an active status by default, meaning that they can log on and access the Early Years application. 'Yes' appears in the Active column against the user's name to confirm their Active status.

Full name	Login	Role	Last login	Active	Actions
Jane Thomas	sandbox-hvmanager4@gmtogether.org	Team Manager	17/01/2020, 08:14	Yes	<a href="#">Deactivate</a>

- If a user leaves their role for example, you can de-activate them in order to remove their system access.

- ➔ Search for the user and locate their record in the search results
- ➔ In the Actions column select **Deactivate**

Full name	Login	Role	Last login	Active	Actions
Anna Marie Lozowicka	aaaa@aaa.com	Health Visitor		Yes	<a href="#">Deactivate</a>

If they try and log in they will be notified that their account is inactive or doesn't exist. They will however still retain access to their NHS account.

- ➔ To restore the user's access to the Early Years application with immediate effect select **Activate** in the Actions column

Active	Actions
No	<a href="#">Activate</a>

### Create new profiles for staff and carers

- At the top right of the Users menu you have the option to create new users in the system, but please see the 'Create User' menu section below for details on when and how to do this.
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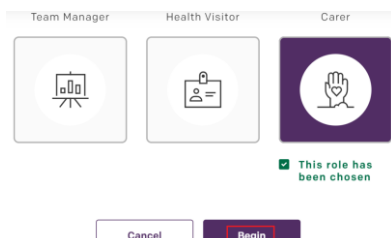
## Create User menu



- **The only profile staff members are required to create is the Carer profile.** All staff (Health Visitors, Managers and Administrators) have access to create Carer profiles in Early Years.
- When you create a new Carer profile, the system will check for duplicates based on Carer's NHS number (which is the unique identifier in the system). If the Carer already exists you will be prevented from duplicating their profile. Before you try and create a new Carer profile it's advisable to search for the user in the Users menu to check they don't already have a profile created.
- **If you need to get new staff members (Health Visitors, Managers or Administrators) set up with Early Years access, you will need to raise a request with your local IT Service Desk.** This is a task which Administrators or Health Visitor Managers can do.

### Create a Carer profile

- ➔ On the **Create User** menu select the **Carer** tile so that it's highlighted in purple and select **Begin**



- ➔ Complete the required fields (including the Carer's NHS number which is mandatory) and at the bottom of the record click on **Save**.

N.B. If you don't yet have the Carer's mobile number and email address, you can create and save their profile without those details at this stage. However you will need to add and confirm those details later on (as explained in the 'Managing Child Profiles' helpguide, in the section 'Confirm Carer contact details').

### Create a new Health Visitor Manager profile

- If a new Health Visitor Manager joins your team, raise a request with your local IT Service Desk to get them set up as a user in Early Years. They'll forward the request to the systems administrators who have permission to set up the new user in the system. The details for the Health Visitor Manager that you'll need to provide to your local IT Service Desk are:

Type of user role required	Team Manager
First name(s)	
Surname	
Locality	
Team	

<b>Office telephone number</b>	
<b>Work email address</b>	
<b>Working hours (optional) – from (hh:mm) – to (hh:mm)</b>	

### Create a new Health Visitor profile

- If a new Health Visitor joins your team, raise a request with your local IT Service Desk to get them set up as a user in Early Years. They'll forward the request to the systems administrators who have permission to set up the new user in the system. The details for the Health Visitor that you'll need to provide to your local IT Service Desk are:

<b>Type of user role required</b>	<b>Health Visitor</b>
<b>First name(s)</b>	
<b>Surname</b>	
<b>Locality</b>	
<b>Team</b>	
<b>Office telephone number</b>	
<b>Work email address</b>	
<b>Working hours (optional) – from (hh:mm) – to (hh:mm)</b>	

### Create a new Administrator profile

- If a new Administrator joins your team, raise a request with your local IT Service Desk to get them set up as a user in Early Years. They'll forward the request to the systems administrators who have permission to set up the new user in the system. The details for the Administrator that you'll need to provide to your local IT Service Desk are:

<b>Type of user role required</b>	<b>Administrator</b>
<b>First name(s)</b>	
<b>Surname</b>	
<b>Locality</b>	
<b>Team</b>	
<b>Office telephone number</b>	
<b>Work email address</b>	
<b>Working hours (optional) – from (hh:mm) – to (hh:mm)</b>	

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## Localities menu



- This section displays a list of localities but they are only editable by system administrators.
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