

Early Years Application

Front Line Administrators

Note: Before you complete any assessments in the child profile, please ensure that you're in the correct child profile by checking the child's demographic information. It's advisable to only have one Early Years or Early Education session open at a time.

Help Guide Quick links:

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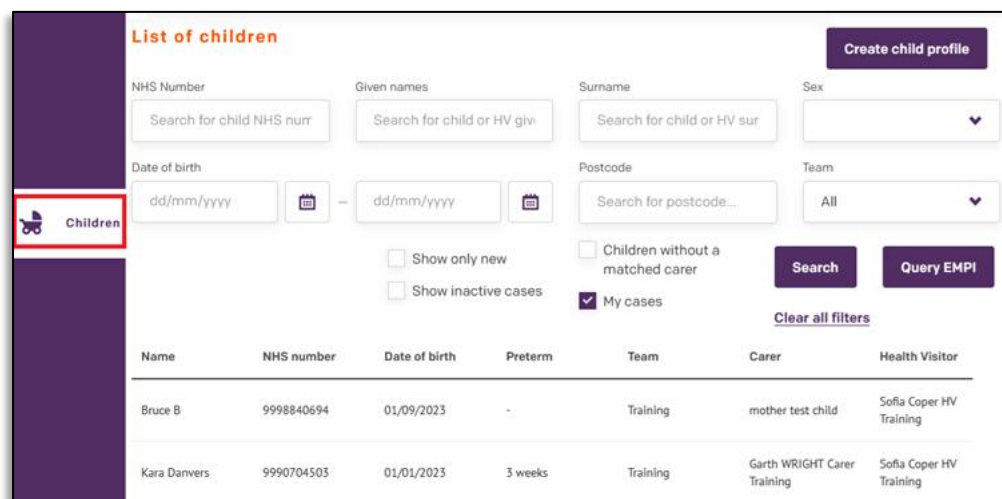
[Reports Summary Menu](#)

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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.



List of children Create child profile

NHS Number: Search for child NHS numr
 Given names: Search for child or HV giv
 Surname: Search for child or HV sur
 Sex:
 Date of birth: dd/mm/yyyy - dd/mm/yyyy
 Postcode: Search for postcode...
 Team: All

☐ Show only new
☐ Show inactive cases
☐ Children without a matched carer
☒ My cases

Search Query EMPI Clear all filters

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
Bruce B	9998840694	01/09/2023	-	Training	mother test child	Sofa Coper HV Training
Kara Danvers	9990704503	01/01/2023	3 weeks	Training	Garth WRIGHT Carer Training	Sofa Coper HV Training

You can also 'refer' to the 'videos' as an additional reference:

Searching For Children: https://youtu.be/PHZ_YbdgKY4?si=7KnfNFTtTt1dXGSs

Assessment Forms: https://youtu.be/yr6S_u0UFeU?si=LnPRKOD33Lwqmn_c

Adding Documents and Case Notes: <https://youtu.be/Q2vSXPwKKU0?si=uvpJbDPviYHpFq0P>

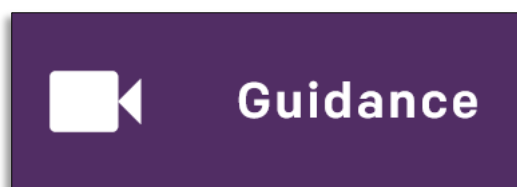
Editing and Exporting Child Profile Data: <https://youtu.be/4IMAZbWVVU4?si=nTvY7SNsCfr--qIB>

Closing A Case: https://youtu.be/sQd_RWBQevk?si=DavkcKnOjQrvxamr

Guidance Menu

This menu contains video guidance available to parents and carers. The video content links to the BBC site 'Tiny Happy People' and will help improve a child's language and development. Staff can also access the content to direct parents to appropriate videos.

Guidance Menu: https://youtu.be/D7216-ESl6U?si=nZGlnIOWSsYR_ppL



Teams Menu

This section enables you to view/add/remove Health Visitors assigned to a team and view the children assigned to Health Visitors. As well as viewing details for your own team you can also view and manage other teams in your locality (e.g. to cover for colleagues).

List of teams					
Name		Manager	Locality	Members	
 Teams	Training	Amber Morgan TM Training	Training	19	Details
	Training Case	Harry Bains	Training	2	Details
	Training Kids Planet	Alicia TM 1	Training	2	Details
	Training Miki Mouse		Training	0	Details

Note: Summary details for the team are displayed, followed by a list of Health Visitors assigned to that 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	
Training	Amber Morgan TM Training	Training	19	Details
Training Case	Harry Bains	Training	2	Details
Training Kids Planet	Alicia TM 1	Training	2	Details
Training Miki Mouse		Training	0	Details

A **‘Team details’** summary will display at the top of the page. A **‘Team Members/Practitioners’** assigned team list will display at the bottom of the page.

Team details					Assign new member
Name	Manager	Locality	Members	Children	
Team 1 Stockport	-	Stockport	1	2	

Team members					
Name	Phone number	Email	Working from	Working to	Children
Practitioner test Stockport UAT		qa-speedupracticitioner10@gmtogether.org			0
					Display children
					Remove member

‘Click’ ‘Display children’ to view a list of children assigned to a Health Visitor’s within the team.

Team members					
Name	Phone number	Email	Working from	Working to	Children
Amanda Halstead	01706676302	a.halstead@nhs.net			0
					Display children
					Remove member

‘Click’ ‘Remove Member’ to remove a Health Visitor from a team.

Team members					
Name	Phone number	Email	Working from	Working to	Children
Amanda Halstead	01706676302	a.halstead@nhs.net			0
					Display children
					Remove member

A Confirmation pop up box appears asking you to confirm that you want to remove the team member from that team.

Confirmation

×

Are you sure you want to remove this member from the team?
By removing a team member, all children will be reassigned to the team.

Remove

Cancel

Note: 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.

‘Click’ ‘Assign new member’ at the top right of the page to assign someone from the existing Health Visitor team.

Teams

Team details

Assign new member

Name	Manager	Locality	Members	Children
Training	-	Training	13	49

Team members

Name	Phone number	Email	Working from	Working to	Children
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Note: Before you can assign a Health Visitor to a team they will first need to be setup as a user. Go to the ‘Create User’ menu to create their profile if one does not exist.

Scroll through a populated list or enter the Health Visitor’s name in the search field and ‘click’ Assign.

Assign new member

×

Search

Search for HV by name...

All

Name	Phone number	Email	Working from	Working to	Children
Bethaney Costello	017066719:	b.costello-			0

Assign

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 '**gmdp.support@nhs.net**'. They will forward the request to the system administrators who can carry out this task.

Below is the information you will need to provide to the IT Service Desk.

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	

Edit a team name/contact detail, or change the team manager who's assigned to a team

If you need to edit the name of a team, change the team contact details for a team or change the manager of a team, raise a request with your local IT Service Desk. They will forward the request to the system administrators who can carry out this task. Let them know which team it is and the name of the manager who should be assigned to the team. If the manager isn't set up as a user in the system yet, you'll also need to ask the IT Service Desk to set them up as a user in the system (see the 'Create User' section below for instructions on this)

List of teams					
Name		Manager	Locality	Members	
 Teams	Training	Amber Morgan TM Training	Training	19	Details Edit
	Training Case	Harry Bains	Training	2	Details Edit
	Training Miki Mouse		Training	0	Details Edit
	Training Kids Planet	Alicia TM 1	Training	2	Details Edit

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.

Users

List of users

Create user

Search

Search for user by name, su...

Role

All

Active

All

Full name	Login	Role	Last login	Team/List	Active	Actions
ALBA		CarerP5		Assigned Children	No	Activate
Alice Jamarr test HV	qa-healthvisitor2@gmtogt her.org	Health Visitor	16/10/2024, 12:46	Training	Yes	Deactivate

You can scroll though the list of users or type a name and the search results will automatically display any matching users. **‘Click’ ‘Role’ or ‘Active’** from the drop-down list to filter the search.

List of users

Create user

Search

James

Role

All

All

Practitioner

CarerP5

CarerP9

Active

All

Active only

Inactive only

Active

Actions

Full name	Login	Role		
James Jonha	9449306559	CarerP5	Assigned	Yes
			Children	

‘Click’ the profile from the search result.

List of users

Create user

Search

James

Role

All

Active

All

Full name	Login	Role	Last login	Team/List	Active	Actions
James Jonha	9449306559	CarerP5		Assigned	Yes	Children

You can edit their details. **‘Scroll’** to the bottom of the page **‘click’** Save or **‘click’** Cancel to return to the search results.

Carer details

Mandatory fields: NHS number, given names, surname, date of birth, locality, address, mobile/landline number

Personal details

NHS number

944

930

5555

Given names

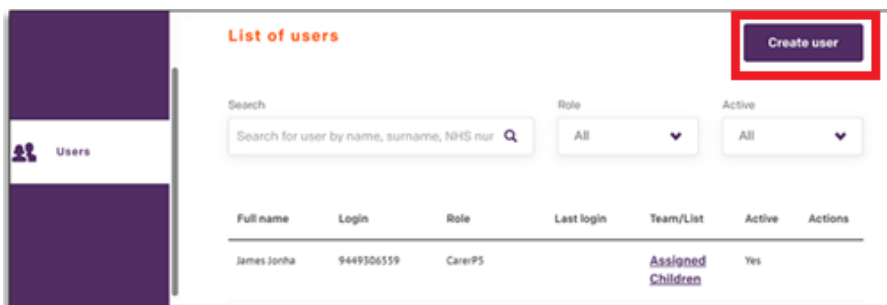
James

Surname

Jonha

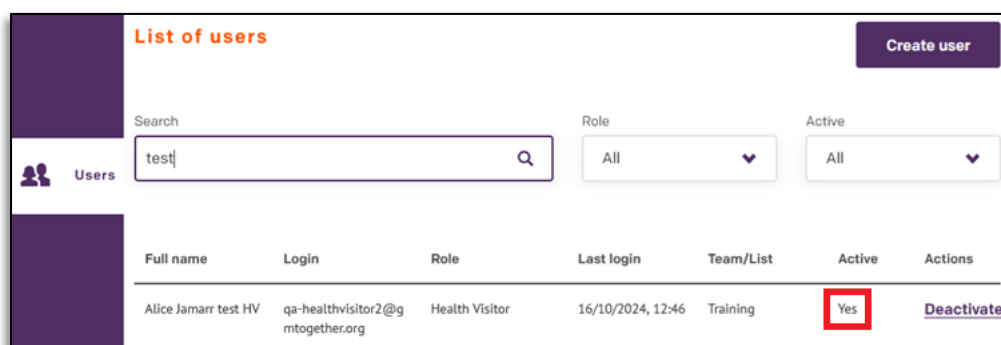
Add new carers and Health Visitors to the system

At the top right of the Users menu, you have the option to add new carers and Health Visitors to the system. This same functionality is also available from the **'Create User'** menu – see the below instructions showing how to do this.

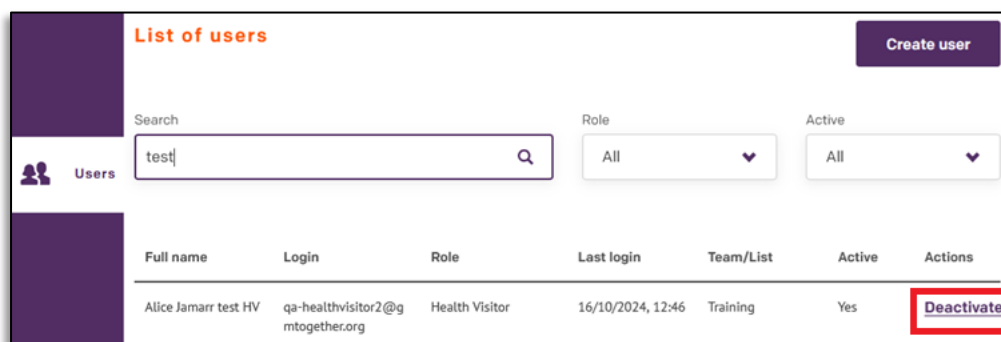


De-activate user accounts

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.



If a user leaves their role for example, you can de-activate them to remove their system access. Search for the user and locate their record in the search results. Click **'Deactivate'**.



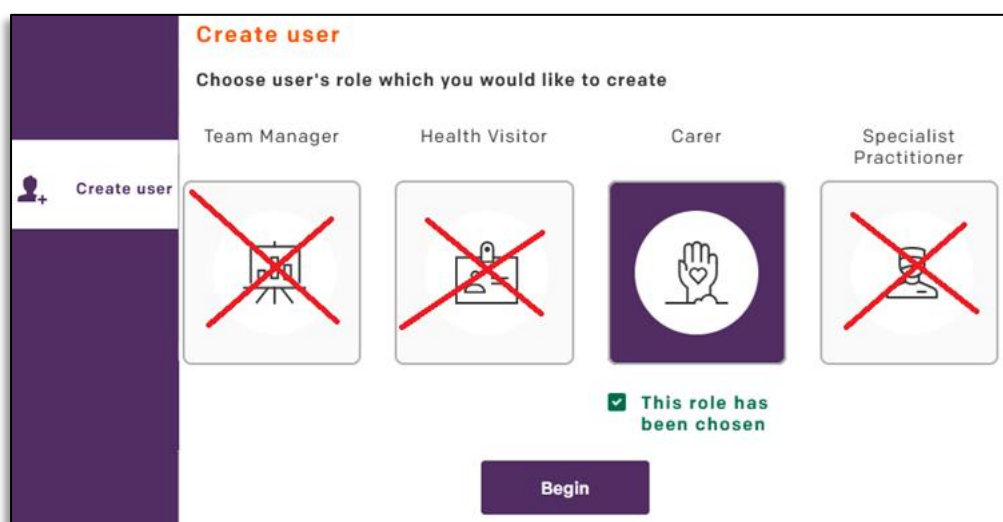
Create User Menu

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.

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



Create user

Choose user's role which you would like to create

Team Manager Health Visitor Carer Specialist Practitioner

☒ This role has been chosen

Begin

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

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' help guide, 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	Health Visitor
First name(s)	
Surname	
Locality	
Team	
Office telephone number	
Work email address	
Working hours (optional) – from (hh:mm) – to (hh:mm)	

Create a new Health Visitor profile

If a new Practitioner joins your team, raise a request 'gmdp.support@nhs.net'. Please view the example below:

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


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:

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

Localities Menu

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

 Localities	List of localities				
	Name	Contact phone	Contact email	Active	Locality ID

Report Menu

‘Report Summary’ gives you a quick access to reports. You can search for a child or scroll through the list.

Report summary Export

Search: Team: Status: Level of Need:

Date of birth: Date of completed assessment:

☐ Show children meeting or exceeding expected level of development Clear all filters
☐ Show children not meeting expected level of development ☐ Show only unsubmitted forms

Name	NHS number	Date of birth	Team	Carer	Health Visitor	Form type	Form completion	Status	Show details	Level of Need
Susan Jones	9464341 815	01/01/20 23	Bramhall Cheadle Hulme	Molly Jones	Practitioner test Stockport UAT	ASQ:SE-2 6 Month Questionnaire	0%	In Progress	Show details	N/A
Lucy Ricardo	9449305 900	05/02/20 22	Bramhall Cheadle Hulme	James Jonha	sky Storm	ASQ:SE-2 2 Month Questionnaire	0%	In Progress	Show details	Universal

‘Click’ ‘Show details’ on the profile with the ‘Finished’ report.

Report summary Export

Search: Team: Status: Level of Need:

Date of birth: Date of completed assessment:

☐ Show children meeting or exceeding expected level of development Clear all filters
☐ Show children not meeting expected level of development ☐ Show only unsubmitted forms

Name	NHS number	Date of birth	Team	Carer	Health Visitor	Form type	Form completion	Status	Show details	Level of Need
Susan Jones	9464341 815	01/01/20 23	Bramhall Cheadle Hulme	Molly Jones	Practitioner test Stockport UAT	ASQ:SE-2 6 Month Questionnaire	0%	In Progress	Show details	N/A
Lucy Ricardo	9449305 900	05/02/20 22	Bramhall Cheadle Hulme	James Jonha	sky Storm	ASQ:SE-2 2 Month Questionnaire	100%	Finished	Show details	Universal

‘Click’ ‘Export summary’ to download the file or scroll through the page to view the entire data form summary.

ASQ:SE-2 2 Month Questionnaire FINISHED Review the form Export summary

ASQ:SE-2 Lucy Ricardo (17 month(s) old) Deadline date: 04/08/2023, 01:00 Submitted date: 31/07/2023, 13:12 Finish review date: 31/07/2023, 13:13 Health visitor: sky Storm

NHS 9449305900

Person filling out the questionnaire: Manager TEST Stockport UAT
Reviewed by: Manager TEST Stockport UAT

Form summary

100 % Form completion	0/19 Empty questions	19/19 Answered questions	0/19 Concern
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Score

60.00
Total scoring

Carers Login Progress Menu

See the separate Carers Login Progress Menu.

To access the Carers login progress page, choose the **'Report'** option located on the left section of the page, then select **'Carers Login Progress'**. Help Guide [Link](#).

The screenshot shows the 'Carers login progress' interface. On the left, a sidebar menu has 'Report' selected, with 'Carers Login Progress' highlighted. The main area has a title 'Carers login progress' and an 'Export' button. Below the title are several filter sections: 'Search' (a text input with a magnifying glass icon), 'Role' (a dropdown menu set to 'All'), 'Logged in' (a dropdown menu set to 'All'), 'Contact Details Confirmed' (a dropdown menu set to 'All'), and 'Active' (a dropdown menu set to 'All'). There is also a 'Child Date of birth' section with two date pickers and a 'Team' dropdown menu set to 'All'. A 'Clear all filters' link is present. Below the filters is a table with columns: Full name, NHS number, Email, Role, Team, Last Login, Contact Details Confirmed, Active, and Actions. The table contains two rows of data. The first row is for 'Billy Perkins' with NHS number 9449306052, role 'CarerPS', team 'Training', and 'No' for both 'Contact Details Confirmed' and 'Active'. The second row is for 'Carer and parent Lewis test' with NHS number 9990228434, email 'testLewis@objectivity.co.uk', role 'CarerPS', team 'Training', and 'No' for both 'Contact Details Confirmed' and 'Active'. Both rows have a 'Resend Invitation' link in the Actions column.

Full name	NHS number	Email	Role	Team	Last Login	Contact Details Confirmed	Active	Actions
Billy Perkins	9449306052		CarerPS	Training		No	No	Resend Invitation
Carer and parent Lewis test	9990228434	testLewis@objectivity.co.uk	CarerPS	Training		No	No	Resend Invitation

Notifications Menu

The Administrator has role access to view the Notifications menu. Refer to the **'Notifications Menu'** help guide. Help Guide [Link](#).

You can also **'refer'** to the **'videos'** as an additional reference:

Early Years How to use the Notifications menu: <https://youtu.be/swY2OJVdWlw?si=wG-ZEPHnnqN5cWZJ>

The screenshot shows the 'Notifications' interface. On the left, a sidebar menu has 'Notifications' selected. The main area has a title 'Notifications' and a search bar. Below the title are three filter sections: 'Search' (a text input with a magnifying glass icon), 'Record type' (a dropdown menu), and 'Action type' (a dropdown menu). Below the filters is a table with columns: Record type, Full name, NHS number, Date of birth, Locality, Source, Action type, Updated date, and Created date. The table contains three rows of data. The first row is for 'Child' with full name 'BABY SCHILLER', NHS number '9039040222', date of birth '28/08/2024', locality 'Training', source 'NEMSpds-birth-notification-1', action type 'NEW', updated date '24/09/2024, 16:13', and created date '24/09/2024, 16:13'. The second row is for 'Person' with full name 'ISABELLA MARTIN', NHS number '9369542892', date of birth '02/02/2000', locality 'Training', source 'NEMSpds-change-of-address-1', action type 'UPDATE', updated date '24/09/2024, 15:40', and created date '24/09/2024, 15:40'. The third row is for 'Carer' with full name 'RON COOKIE', NHS number '9268112477', date of birth '01/01/2000', locality 'Training', source 'NEMSpds-change-of-address-1', action type 'UPDATE', updated date '24/09/2024, 15:28', and created date '24/09/2024, 15:28'. Each row has a 'Details' link in the Actions column.

Record type	Full name	NHS number	Date of birth	Locality	Source	Action type	Updated date	Created date	Details
Child	BABY SCHILLER	9039040222	28/08/2024	Training	NEMSpds-birth-notification-1	NEW	24/09/2024, 16:13	24/09/2024, 16:13	Details
Person	ISABELLA MARTIN	9369542892	02/02/2000	Training	NEMSpds-change-of-address-1	UPDATE	24/09/2024, 15:40	24/09/2024, 15:40	Details
Carer	RON COOKIE	9268112477	01/01/2000	Training	NEMSpds-change-of-address-1	UPDATE	24/09/2024, 15:28	24/09/2024, 15:28	Details

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