Early Years Child Development App

Health Visitor Managers

> 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 Administrators.
>
> This particular help guide covers additional functionality available in the Health Visitor Manager view:
> - Dashboard – view details of your team (pg 1-2)
> - Teams menu - view/add/remove Health Visitors assigned to a team and view the children in their caseload (pg 3-4)
> - Users menu – view and edit Carer and Health Visitor profiles (pg 5)
> - Create User menu (pg 6-8)
>   - create new profiles for carers
>   - process to follow to get new staff members access to Early Years
> - Assigning children to your caseload (pg 9-10)

Viewing the Dashboard

- The Dashboard helps you to manage your team by displaying summary information about your team members and their cases.

Your Team in Numbers

View a list of Health Visitors in your team

➡ Select **Open List** on the Health Visitors tile

Your Team in Numbers

5	12
Health Visitors	Children
Open List	Open List
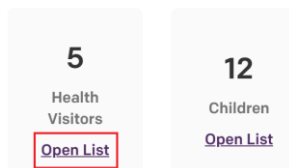
A list of Health Visitors assigned to your team is displayed. From here you can add and remove Health Visitors from the team and view the children assigned to Health Visitors (this same functionality is also available in the Teams menu).

View a list of children in your team

➡ From the Dashboard select **Open List** on the Children tile

Your Team in Numbers

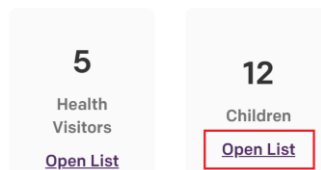| 5	12
Health Visitors	Children
Open List	**Open List**

The children in your team are listed and you can select a child's name to open their profile.

> N.B. The number of children in your team as stated on the Dashboard may be higher than the number which appear when you open the list. This is because there is a filter on the full list which only displays children under 2 ½ years old. To show older children in the full list you can amend the date of birth search field.

HV Case Load

Displays the number of children assigned to each Health Visitor in your team

➡ Select a Health Visitor to view a list of children assigned to them

Your Team in Numbers (last 6 months)

Displays a summary of the number of assessment forms over the last 6 months which were submitted on time by Carers or which were overdue (not completed by Carers within the stipulated time period).

Children menu   <kbd>🛒 Children</kbd>

■ 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

Guidance menu   <kbd>🎥 Guidances</kbd>

■ Contains video guidance for parents and Carers. Staff can also access the content in order to direct parents to appropriate videos.

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. in order to cover for colleagues).

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	Details

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

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	Display children Remove member

A list of children who are assigned to that Health Visitor will display. You can select a child's name to open 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	Display children Remove member

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. 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	**Assign**

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

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	

Edit a team name/contact details, 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)

Users menu   **Users**

- ■ This section enables you to view and edit profiles for Carers and Health Visitors.
- ■ You can also add new Carers and Health Visitors to Early Years (functionality which is also available from the Create User menu).

Search for carers and Health Visitors

➡ Type their name in the search field and the search results will automatically display any matching users

List of users

Search

| Olivier | 🔍 |

Full name	Login
Olivier Martin	sandbox-hv3@gmtogether.org

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

| All | ❯ |

All
Carer
Health Visitor

Active

| All | ❯ |

View and edit carer and Health Visitor profiles

➡ Select the carer or Health Visitor from the search results to open their profile

You can make any changes to their details and at the bottom of the form **Save** the profile or select **Cancel** to return to the search results

| Cancel | Save |

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.

List of users   **Create user**
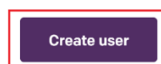
Create User menu   **Create user**

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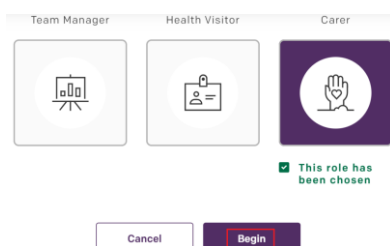
➡ Complete the required fields (including the Carer's NHS number which is mandatory) and at the bottom of the record click on **Save.**

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

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:

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	Administrator
First name(s)	
Surname	
Locality	
Team	

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

Assigning children to your caseload

■ Health Visitor Managers have the same functionality available to them as Health Visitors to assign children to their caseloads

Assigning a child to your caseload

➡ If the child doesn't currently have a Health Visitor assigned to them you can search for the child in the Children menu and within the search results select **Assign** under the Health Visitor column

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
TARAH BORIANIFISHER	9449305250	01/12/2020	No	Epsom	TYLAR PIASKO	Assign

➡ Within the pop up window select **Assign to me** and then select **Confirm.** The child will now be assigned to your caseload.

Assign Health Visitor   ✕

Search

| Search for Health Visitor by name or surname... | 🔍 | **Assign to me** |

Given names	Surname	Team	Email
CHABAH	ABRAVANEL	Epsom	Testinggmca17@outlook.com
CLEM	COTTERRILL	Epsom	clem@greatermanchestercombined.com

| Cancel | Confirm |

➡ If the child already has a Health Visitor assigned to them you can change it to your name by searching for the child in the Children menu and selecting **Go to details**

Child details   Back to children

TARAH BORIANIFISHER (3 week(s) old)

NHS 9449305250

Go to details

Date of birth

01/12/2020

Preterm:

No

In the Health care professional's details section select **Update**

Health care professional's details

Health visitor [Update]
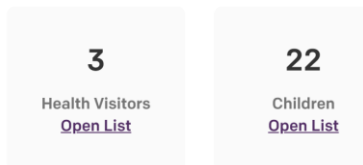
Assigned Health Visitor: Joe Walsh

➡ Within the pop up window select **Assign to me**

Viewing details of children in your caseload
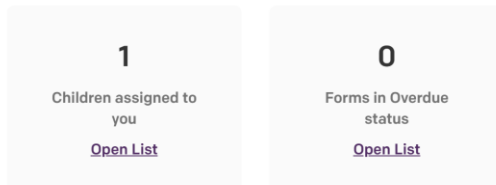
➡ On your Dashboard select the **My Cases** tab

My Team | [My Cases]

Your Team in Numbers

3	22
Health Visitors	Children
Open List	Open List

The Dashboard shows you the children assigned to you and how many forms for those children are in Overdue status. The list of recently submitted forms displays the last 100 forms submitted by the parents/carers of children in your caseload.

Your Cases in Numbers

1	0
Children assigned to you	Forms in Overdue status
Open List	Open List

Recently submitted forms