



## Early Years Application

# Managing Child Profiles: Health Visitors, HV Managers and Administrators

**Note:** This guide covers content in the Children Menu.

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:

[Create a Child Profile](#)

[Create a Child Profile Warning](#)

[Search for Children](#)

[Search for a child and assign a carer to that child](#)

[Search for a child and assign a Health Visitor](#)

[View a child's profile](#)

[Close Case](#)

[Reopen a Case](#)

[Edit details for a child, parents, GP and Carer](#)

[Assign, change or remove a carer or HV from within the child profile](#)

[Confirm Carer contact details to enable them to access Early Years](#)

[Changing the mother's contact details](#)

[Adding Case Notes to a Child Profile](#)

[Additional Contact Details](#)

[Selected Forms](#)

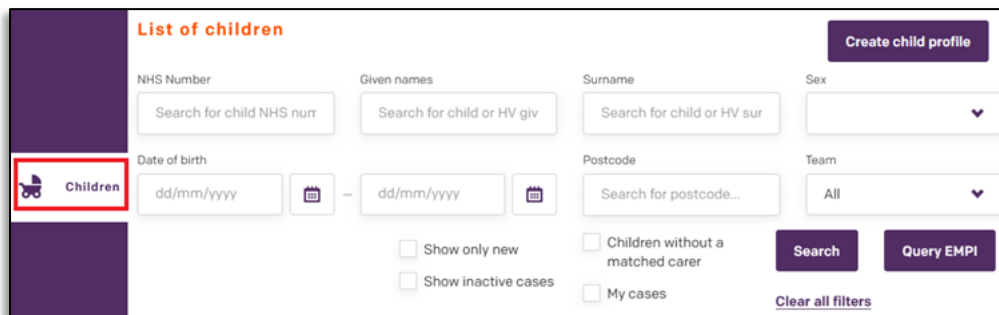
[Uploading documents to a child's profile](#)

[Early Years Video Links](#)

## Create a Child Profile

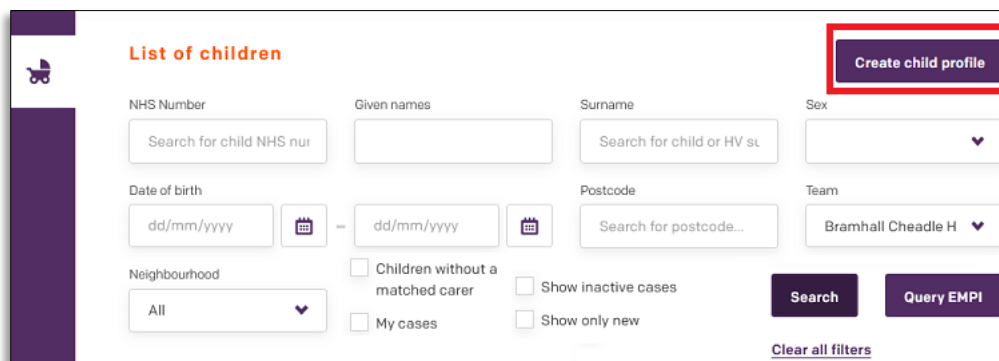
Before you create a new child profile it's advisable to search for the child in the Children menu to make sure they don't already have a profile created. The application will prevent you from creating a duplicate profile as the NHS number is the unique identifier for each child.

On the left side of the page **'select'** the **'Children'** Menu.



The screenshot shows the 'List of children' interface. On the left sidebar, the 'Children' menu item is highlighted with a red box. The main area contains search filters for NHS Number, Given names, Surname, Sex, Date of birth, Postcode, Team, and checkboxes for 'Show only new', 'Children without a matched carer', 'Show inactive cases', and 'My cases'. A 'Create child profile' button is located in the top right corner.

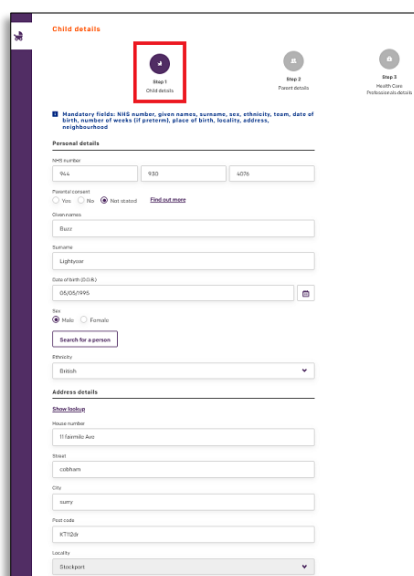
**'Click'** on the **'Create child profile'** button in the top right of the Children menu.



The screenshot shows the 'List of children' interface. The 'Create child profile' button in the top right corner is highlighted with a red box. The search filters and checkboxes are visible, but the 'Children' menu item is not highlighted.

**Step 1: (Child Details) 'Enter' the 'NHS number'.** Select the **'Parental consent'**. The **'Parental Consent'** section records whether the parent/carers gives agreement for their child's assessment form data to be shared between appropriate professionals in health and the local authority. It with either state 'Yes', 'No', or 'Not Stated' (if a conversation hasn't yet taken place with the parent).

Enter the **'Given name'**, **'Surname'** and complete the rest of the fields.



The screenshot shows the 'Child details' form. The 'Step 1: Child details' tab is highlighted with a red box. The form contains sections for 'Personal details' (NHS number, Parental consent, Given names, Surname, Date of birth, Sex) and 'Address details' (House number, Street, City, Post code, Locality). A 'Search for appen' button is visible below the 'Personal details' section.

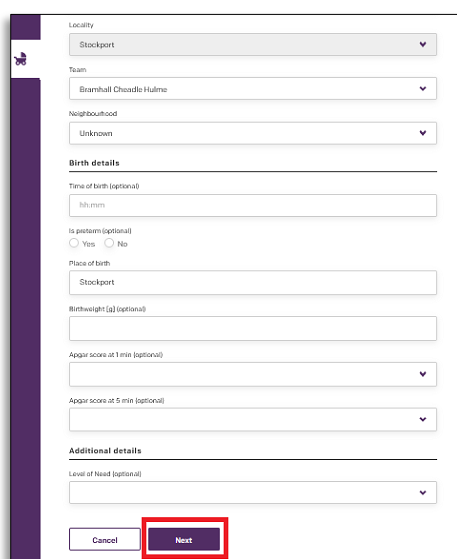
**Note:** N.B: If the **Ethnicity** is unknown or the subject hasn't been asked select **Unknown** from the drop down list. Select **Not Stated** if the person has been given the opportunity to state their ethnicity but has chosen not to.

If you select that the child is **Preterm** and state the number of weeks, Early Years will take that into account and adjust when the assessment forms are generated.

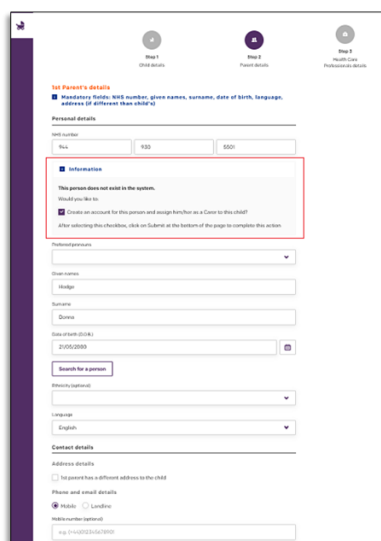
The child's **Team** defaults to the Team of the staff member creating the profile so you will need to change it if the child sits within a different team.

To enter the address, enter the postcode in the **Address Lookup** search field and select **Find Address**, then select the address from the list. If the address doesn't display, select **I can't find an address** and enter the address details manually.

Once you have entered the information and **'selected'** the **'level of need'** **'click'** **'Next'**

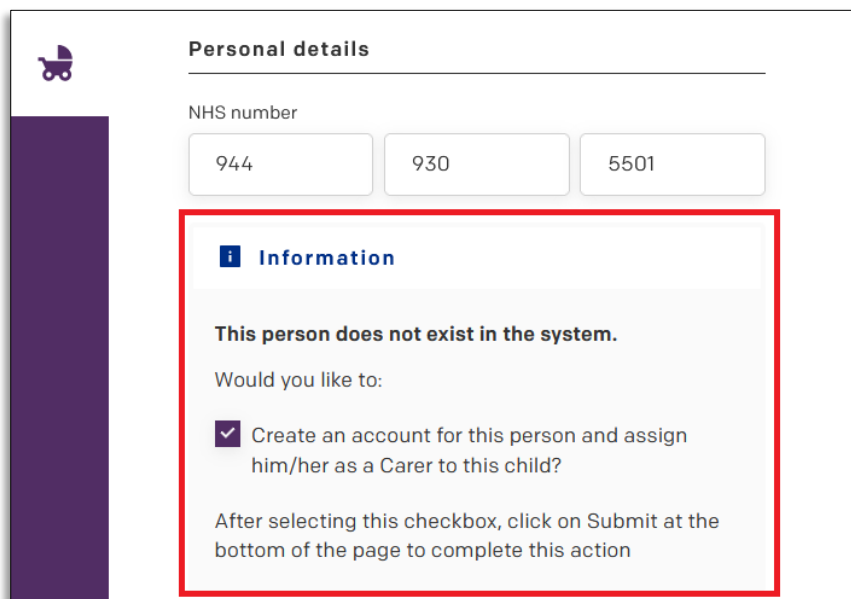


**Step 2: (Parent Details)** Enter the 1st Parent's NHS number. When you enter the birth mother's NHS number, if the mother doesn't already exist in the system, then a box will appear.



**Note:** If the **Ethnicity** is unknown or the subject hasn't been asked select **Unknown** from the drop down list. Select **Not Stated** if the person has been given the opportunity to state their ethnicity but has chosen not to.

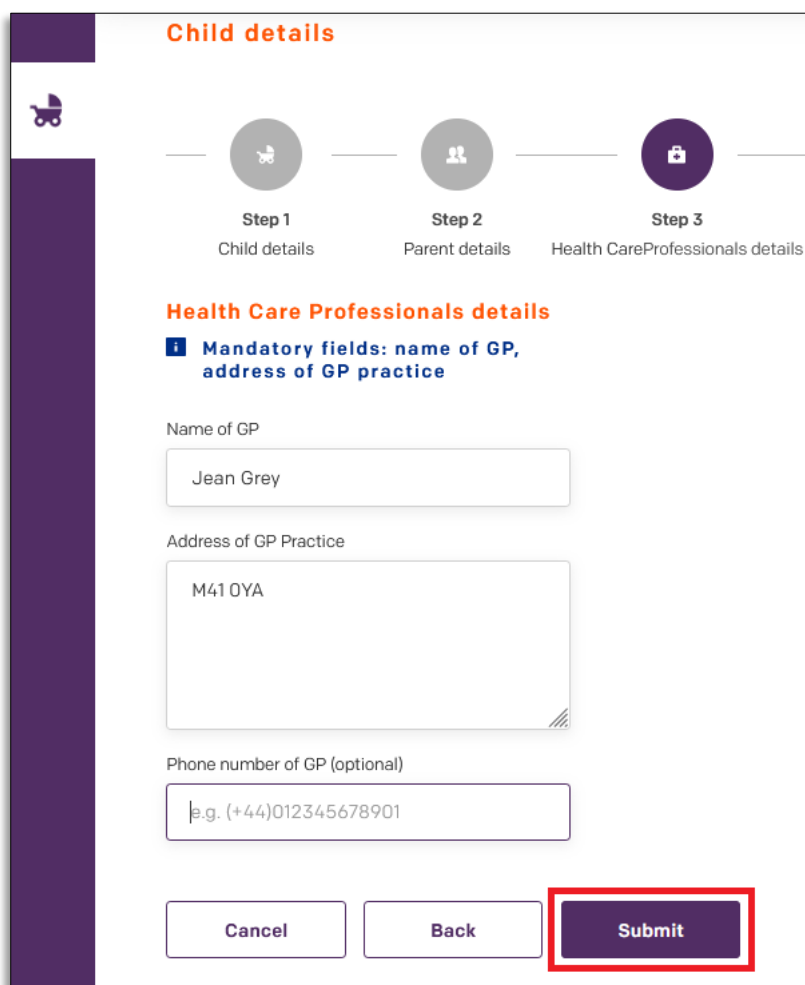
The prompt will ask if you wish to **‘create an account for the mother’** and **‘assign her’** as the **‘carer’** to the child. **‘Select’** the **‘checkbox’** if you wish to do this. If there is a different Carer to the child, leave this checkbox blank and you can assign a different Carer later.



The screenshot shows a 'Personal details' form. At the top, there's a purple header with a baby icon. Below it, the title 'Personal details' is underlined. The 'NHS number' section has three input fields containing '944', '930', and '5501'. Below these is a red-bordered box containing an information icon, the title 'Information', and the text: 'This person does not exist in the system. Would you like to:'. There is a checked checkbox followed by the text 'Create an account for this person and assign him/her as a Carer to this child?'. At the bottom of the box, it says 'After selecting this checkbox, click on Submit at the bottom of the page to complete this action'.

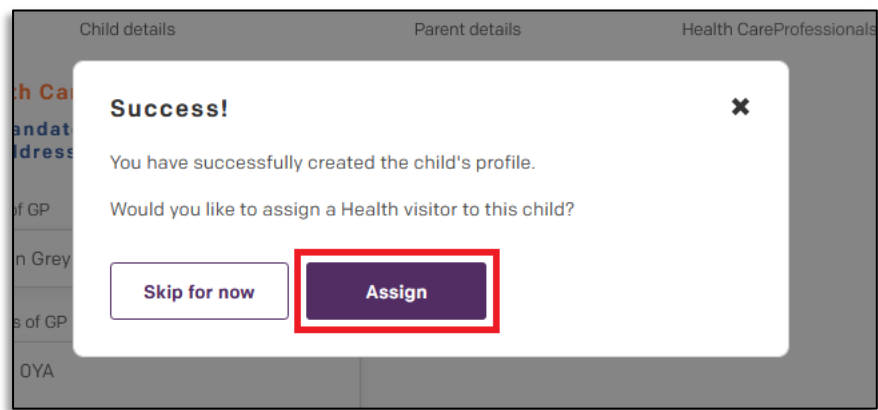
**Note:** It is only the **‘Carer’** who has access to the child’s records on Early Years; the **‘Parent’** will only have access if they have been assigned as the Carer to the child.

**Step 3:** Add the details for the child’s G.P. **‘Click’ ‘Submit’.**



The screenshot shows a 'Child details' form. At the top, there's a purple header with a baby icon. Below it, the title 'Child details' is in orange. There are three steps: 'Step 1 Child details', 'Step 2 Parent details', and 'Step 3 Health Care Professionals details'. The 'Step 3' icon is highlighted. Below the steps, the title 'Health Care Professionals details' is in orange. There's an information icon followed by the text: 'Mandatory fields: name of GP, address of GP practice'. The 'Name of GP' field contains 'Jean Grey'. The 'Address of GP Practice' field contains 'M41 0YA'. The 'Phone number of GP (optional)' field contains 'e.g. (+44)012345678901'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Submit'. The 'Submit' button is highlighted with a red border.

A prompt will populate confirming you've successfully created the profile. It also gives you the option to **'assign'** a **'Carer to the child'** (if you didn't assign the mother as the Carer earlier) and if you want to **'assign'** a **'Health Visitor'**. In this case we assigned the Carer earlier. We will assign a Health Visitor to the child. **'Click'** **'Assign'**



**Note:** Select **'Skip for now'** if you want to assign a Carer and Health Visitor later on.

If you did **'not'** **'Assign a Carer'** or **'Health Visitor'** then you would get this prompt. Select an appropriate checkbox in the **'Assigning Carer'** section and in the **'Assigning Health Visitor'** section, depending on what action you wish to take.

**Assigning Carer**  
  
☐ Leave the child unassigned  
☐ Create a new Carer's account  
☐ Existing Carer

**Assigning Health Visitor**  
  
☐ Leave the child unassigned  
☐ Existing Health Visitor

**Note:** You must select a checkbox in both these sections before you'll be able to select **'Confirm'** at the end of the page.

To assign an existing **'carer'** or **'Health Visitor'** within this section, enter their name and **'click'** their name from the search results. **'Click'** **'Confirm'**.

**Assigning Health Visitor**

Search

Sky Storm

Given names	Surname	Team	Email
sky	Storm	Bramhall Cheadle Hulme	sky.storm@aol.com

Cancel

Confirm

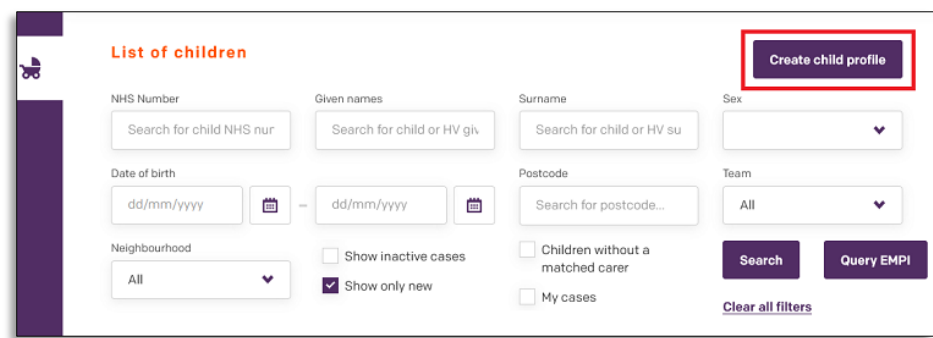
A prompt will populate confirming you've successfully assigned the Health Visitor and the child profile has been created. **'Click' 'okay'**.



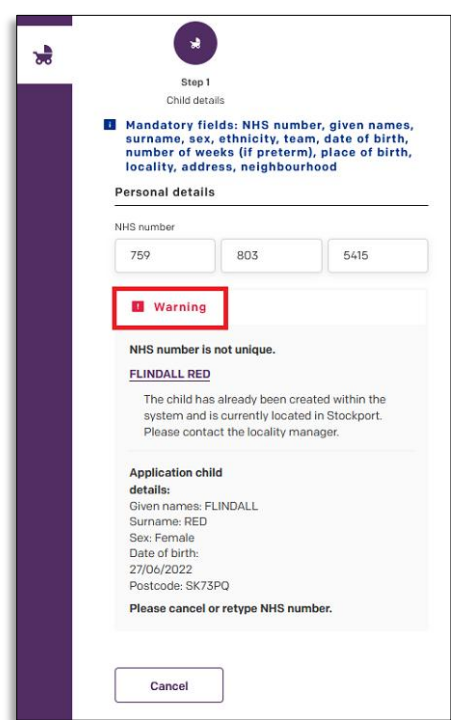
## Create a Child Profile Warning

In this scenario a **'Warning'** will populate when you try to 'Create child profile'.

**'Click'** on the **'Create child profile'** button in the top right of the Children menu.



Enter the NHS number and a warning will populate indicating that the profile exists within the application system. **'Click'** on the name (**Flindall Red**) and you will be taken to the Childs profile. **'Click' 'Cancel'** to go back to the Childrens Search page.



## Search for Children

Health Visitors, Health Visitor Managers and Administrators are able to view child profiles for all children in their locality.

A list of children will populate at the bottom of the page. You can scroll through the list or enter the criteria in the **'search'** fields to find a specific profile. You can also filter by **'Sex'**, **'Date of birth'**, **'Postcode'**, **'Team'** and **'Neighbourhood'**.

**List of children**

Create child profile

NHS Number: Search for child NHS number... Given names: Search for child or HV given name... Surname: Search for child or HV surname... Sex: [Dropdown]

Date of birth: dd/mm/yyyy - dd/mm/yyyy Postcode: Search for postcode... Team: All [Dropdown]

Neighbourhood: All [Dropdown]

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

Search Query EMPI Clear all filters

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
KINGHORN Ozzy	4159156118	07/05/2023	No	Bramhall Cheadle Hulme	ALIX ASCIC	sky Storm
HILLAKER NADIA	8761037672	12/03/2023	No	Bramhall Cheadle Hulme	ALEXANDER GILBERT	Practitioner test Stockport UAT

To view a list of children who don't have a Health Visitor assigned select **'Unassigned children'** from the **'Team'** dropdown list

**List of children**

Create child profile

NHS Number: Search for child NHS number... Given names: Search for child or HV given name... Surname: Search for child or HV surname... Sex: [Dropdown]

Date of birth: dd/mm/yyyy - dd/mm/yyyy Postcode: Search for postcode... Team: Unassigned children [Dropdown]

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

Search Query EMPI Clear all filters

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
Grant Reynolds test child mmar	4139434597	01/06/2023	No		Assign	Elliot Green HBA Rochdale

**'Tick'** a Search Criteria in this case **'Show inactive cases'** and **'Children without a matched carer'**. **'Click'** **'Search'** to view the profile.

**List of children**

Create child profile

NHS Number: Search for child NHS number... Given names: Search for child or HV given name... Surname: Search for child or HV surname... Sex: [Dropdown]

Date of birth: dd/mm/yyyy - dd/mm/yyyy Postcode: Search for postcode... Team: All [Dropdown]

Neighbourhood: All [Dropdown]

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

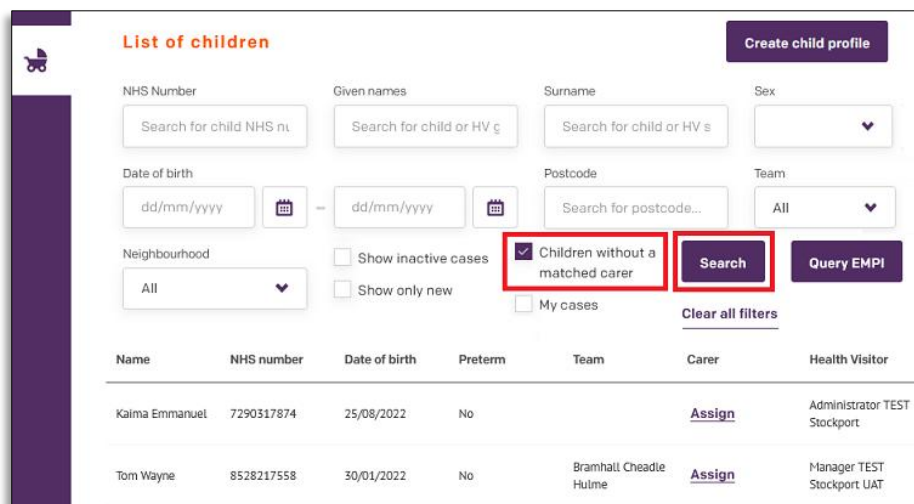
Search Query EMPI Clear all filters

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
<b>NEW</b> Kaima Emmanuel	7290317874	25/08/2022	No	Bramhall Cheadle Hulme	Assign	Assign
Tom Wayne	8528217558	30/01/2022	No	Bramhall Cheadle Hulme	Assign	Manager TEST Stockport UAT

**Note:** By selecting **'Show inactive cases'**, the search results will include child profiles which have been closed (e.g. if the child has left the area or is deceased).

## Search for a child and assign a carer to that child

From the Children menu you can search for the child, you wish to assign a carer to or **'Tick' 'filter Children without a matched carer'** and **'click' 'Search'**.



**List of children** Create child profile

NHS Number:  Search for child NHS nu  
Given names:  Search for child or HV g  
Surname:  Search for child or HV s  
Sex:

Date of birth:  dd/mm/yyyy  dd/mm/yyyy  Postcode:  Search for postcode...  
Team:  All

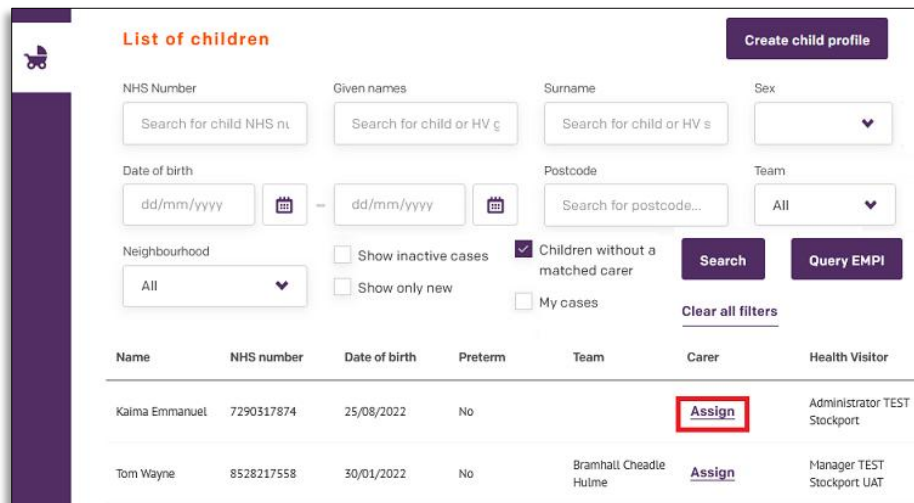
Neighbourhood:  All

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

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
Kalima Emmanuel	7290317874	25/08/2022	No		<a href="#">Assign</a>	Administrator TEST Stockport
Tom Wayne	8528217558	30/01/2022	No	Bramhall Cheadle Hulme	<a href="#">Assign</a>	Manager TEST Stockport UAT

**Note:** If you wish to assign a different Carer to a child or temporarily unassign a Carer from a child (e.g. if the child is in the process of being taken into foster care), then this can only be done within the child's profile in the **'Go to details'** page.

The search results will display the children's profiles without an assigned carer. **'Click' 'Assign'** in the **'Carer'** column of the child's record.



**List of children** Create child profile

NHS Number:  Search for child NHS nu  
Given names:  Search for child or HV g  
Surname:  Search for child or HV s  
Sex:

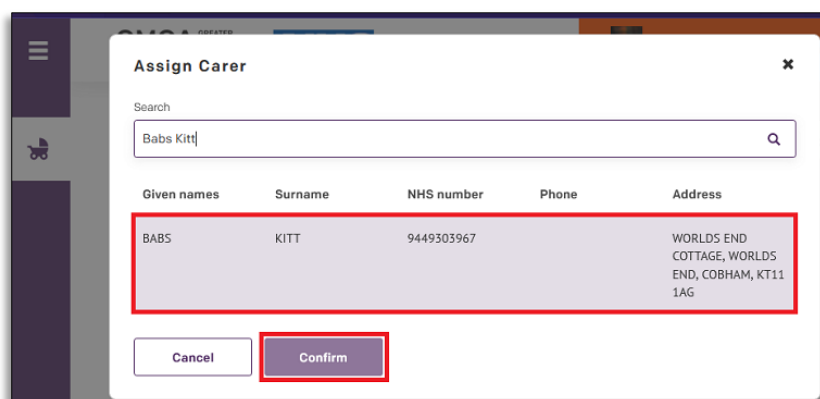
Date of birth:  dd/mm/yyyy  dd/mm/yyyy  Postcode:  Search for postcode...  
Team:  All

Neighbourhood:  All

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

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
Kalima Emmanuel	7290317874	25/08/2022	No		<a href="#">Assign</a>	Administrator TEST Stockport
Tom Wayne	8528217558	30/01/2022	No	Bramhall Cheadle Hulme	<a href="#">Assign</a>	Manager TEST Stockport UAT

A search carer pop up window will display. Choose from the list of carers or type a name in the Search field. **'click'** the carer profile and **'click' 'confirm'**. The carer is now assigned to the child.



**Assign Carer**

Search:  Babs Kitt

Given names	Surname	NHS number	Phone	Address
BABS	KITT	9449303967		WORLDS END COTTAGE, WORLDS END, COBHAM, KT11 1AG



## Search for a child and assign a Health Visitor

From the Children menu you can search for the child, you wish to assign a Health Visitor to or **Select Unassigned Children** and ‘click’ ‘Search’.

If you wish to assign a different ‘**Health Visitor**’ to a child, then you need to do this from within the child’s profile.

**List of children**

Create child profile

NHS Number: Search for child NHS numr  
Given names: Baby 2  
Surname: Search for child or HV sur  
Sex:   
Date of birth: dd/mm/yyyy - dd/mm/yyyy  
Postcode: Search for postcode...  
Team: Unassigned children  
Neighbourhood: All  
☐ Show inactive cases  
☐ Show only new  
☐ Children without a matched carer  
☐ My cases  
Search Query EMPI  
Clear all filters

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
<b>NEW</b> Baby 2 Stockport	2534413740	13/01/2022	No	Bramhall Cheadle Hulme	<a href="#">Assign</a>	<a href="#">Assign</a>

**Note:** In the search results, children who have ‘**New**’ against their name have not yet had a Health Visitor assigned to them (and therefore may require one assigning); children without ‘**New**’ against their name have been deliberately unassigned from a Health Visitor (e.g. if they’re placed into a general pool when they turn one).

## View a child’s profile

Enter the ‘**NHS number**’ and ‘**Click**’ the profile you want to view.

**List of children**

Create child profile

NHS Number: 7290317874  
Given names: Search for child or HV given  
Surname: Search for child or HV surna  
Sex:   
Date of birth: dd/mm/yyyy - dd/mm/yyyy  
Postcode: Search for postcode...  
Team: All  
Neighbourhood: All  
☐ Show inactive cases  
☐ Show only new  
☐ Children without a matched carer  
☐ My cases  
Search Query EMPI  
Clear all filters

1 Application child found

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
<b>NEW</b> Kalima Emmanuel	7290317874	25/08/2022	No	Bramhall Cheadle Hulme	<a href="#">Assign</a>	<a href="#">Assign</a>

In the child details profile, you can **‘Export All’** the information from the page, **‘Close a case’**, **‘Go to Details’** for the child, edit the **‘carer’**, add **‘additional contact details’**, view **‘selected forms’** and **‘add a note’**.

Child details

Back to children

Export All

Close case

KINGHORN Ozzy (19 week(s) old)

Date of birth

07/05/2023

Carer

ALIX ASCIC

Phone

7725479081

Address

FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL BRAMHALL, STOCKPORT

Go to details

Preterm:

No

Contact details not confirmed

Email

unknown@aswzemail.com

Additional contact details

Health visitor: [sky Storm](#)

Phone number: -

Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

Selected forms

Outcome

Assessments configuration

Documents

Settings

Selected forms

Child's age

D-60 months

☒ Ignore overdue forms with 0% completion

Form	Due date	Created	Category	Filled in by	Completion	Status
<a href="#">ASQ-3 4 Month Questionnaire</a>	07/10/2023	06/06/2023, 10:55	Child	Administrator TEST Stockport	97%	<div>SUBMITTED</div>

Notes

Category

Please enter your note here...

**Export All:** ‘Click’ ‘Export All’ and you will receive an email with the download link as soon as the file is ready.

Child details

Back to children

Export All

Close case

Lucy Ricardo (11 week(s) old)

Date of birth

05/05/2023

Carer

[James Jonha](#)

Phone

07654376567

Address

3 HIGH STREET, KT113DH COBHAM

Go to details

Preterm:

1 week(s)

Contact details confirmed

Email

Testinggmca2@outlook.com

**Note:** A pop up will generate to confirm the export

# Close Case

## Scenario 1

### Children who move out of your locality.

You may need to close a child's case if the child moves out of Greater Manchester (to an area not using Early Years) or if the child is deceased. Once a case is closed, no assessment forms will be generated, and no notifications will be sent. In the child's details profile page **'Click' 'Close case'**.

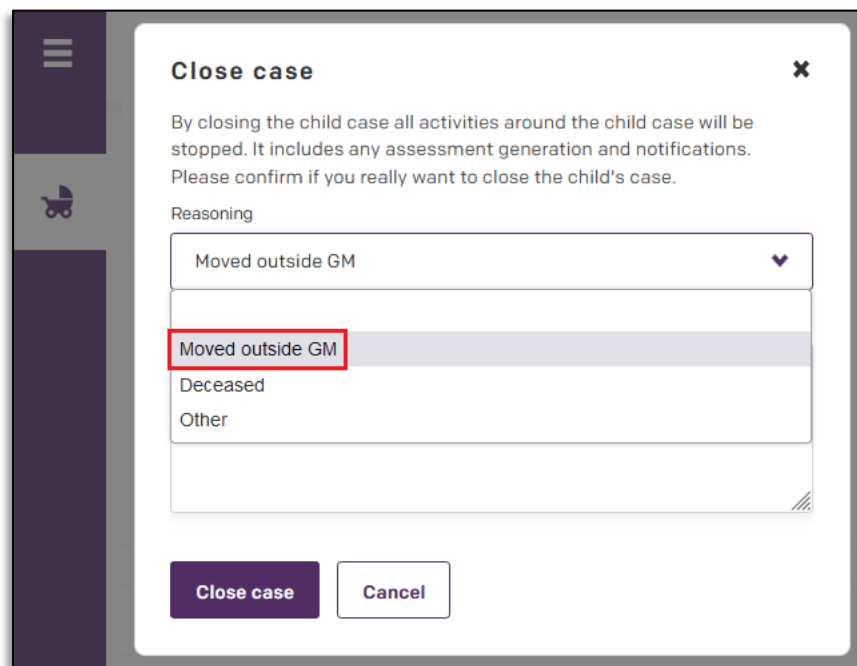
The screenshot shows the 'Child details' page for KINGHORN Ozzy (19 week(s) old). The page includes fields for Date of birth (07/05/2023), Carer (ALIX ASCIC), Phone (7725479081), Address (FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL, BRAMHALL, STOCKPORT), and Preterm status (No). A red box highlights the 'Close case' button in the top right corner. Below the main details, there is a section for 'Additional contact details' and a 'Health visitor' section for sky Storm. The 'Selected forms' section shows a table with one form: 'ASQ-3 4 Month Questionnaire' due on 07/10/2023, created on 06/08/2023, with a completion status of 97% and a 'SUBMITTED' button. A 'Notes' section is also visible at the bottom.

Form	Due date	Created	Category	Filled in by	Completion	Status
ASQ-3 4 Month Questionnaire	07/10/2023	06/08/2023, 10:55	Child	Administrator TEST Stockport	97%	SUBMITTED

If a child assessment is open a prompt will ask if you want to proceed. Click Cancel to go back to the child details page or **'click' 'Proceed'** to close the case.

The screenshot shows a 'Close case' confirmation dialog. The dialog asks: 'This child has an open assessment. Do you wish to proceed and close case anyway?'. There are two buttons: 'Proceed' (highlighted with a red box) and 'Cancel'.

**‘Click’ ‘Reasoning’** from the drop-down list. In this case we will **‘select’ ‘Moved outside GM’** and enter further details in the **‘Description’** box. If you click **‘Moved outside GM’** you will not be able to reopen the case or show inactive cases. The child’s profile will be removed from the system. **‘Click’ ‘Close case’**.



The image shows a 'Close case' dialog box. It has a title bar with a close button (X). The main text says: 'By closing the child case all activities around the child case will be stopped. It includes any assessment generation and notifications. Please confirm if you really want to close the child's case.' Below this is a 'Reasoning' section with a dropdown menu. The dropdown is open, showing three options: 'Moved outside GM' (highlighted with a red box), 'Deceased', and 'Other'. At the bottom of the dialog are two buttons: 'Close case' (in a dark purple box) and 'Cancel' (in a white box with a purple border).

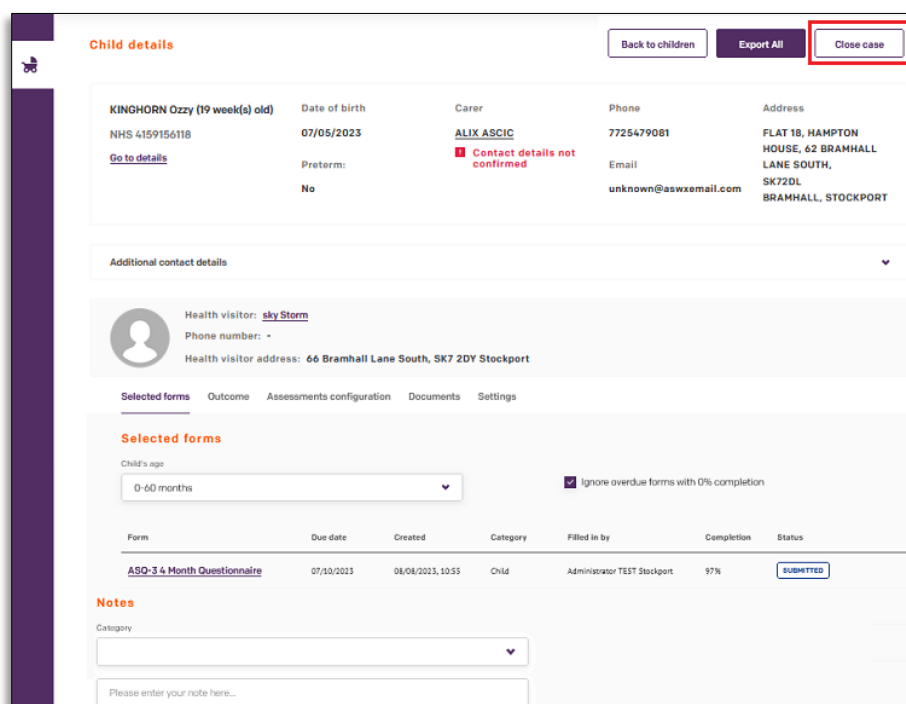
**Note:** If you click **‘Moved outside GM’** you will not be able to reopen the case or show inactive cases. You will need to contact the **‘gmdp.support@nhs.net’** with the child’s information if a mistake was made.

## Close Case:

### Scenario 2

**Closing a case for a deceased child or other.**

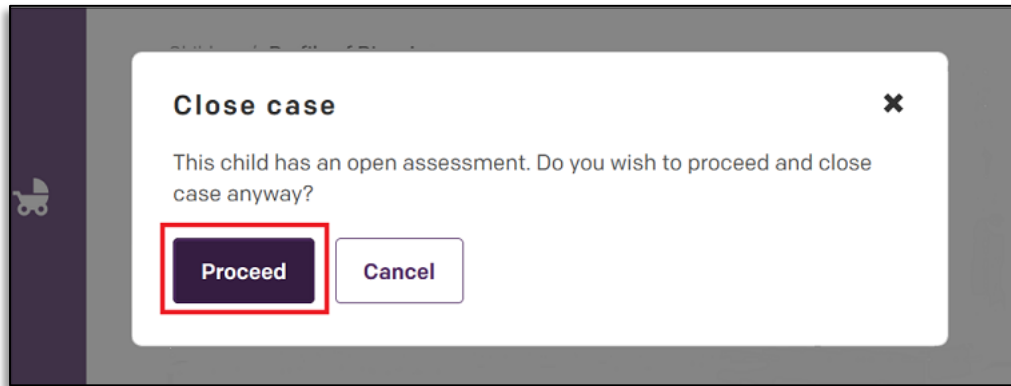
In the child’s details profile page **‘Click’ ‘Close case’**.



The image shows a 'Child details' profile page. At the top right, there are three buttons: 'Back to children', 'Export All', and 'Close case' (highlighted with a red box). The main content area displays details for 'KINGHORN Ozzy (19 week(s) old)'. It includes fields for Date of birth (07/05/2023), Carer (ALIX ASCIC), Phone (7725479081), Address (FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL BRAMHALL, STOCKPORT), and Preterm status (No). There is a red warning icon and text: 'Contact details not confirmed'. Below this is a section for 'Additional contact details'. Further down is a 'Health visitor' section with a profile icon, name (sky Storm), phone number, and address (66 Bramhall Lane South, SK7 2DY Stockport). Below that are tabs for 'Selected forms', 'Outcome', 'Assessments configuration', 'Documents', and 'Settings'. The 'Selected forms' tab is active, showing a table of forms. The table has columns: Form, Due date, Created, Category, Filled in by, Completion, and Status. One form is listed: 'ASD-3 & Month Questionnaire' with a due date of 07/10/2023, created on 08/08/2023, category 'Child', filled in by 'Administrator TEST Stockport', and 97% completion. The status is 'SUBMITTED'. At the bottom is a 'Notes' section with a category dropdown and a text area for notes.

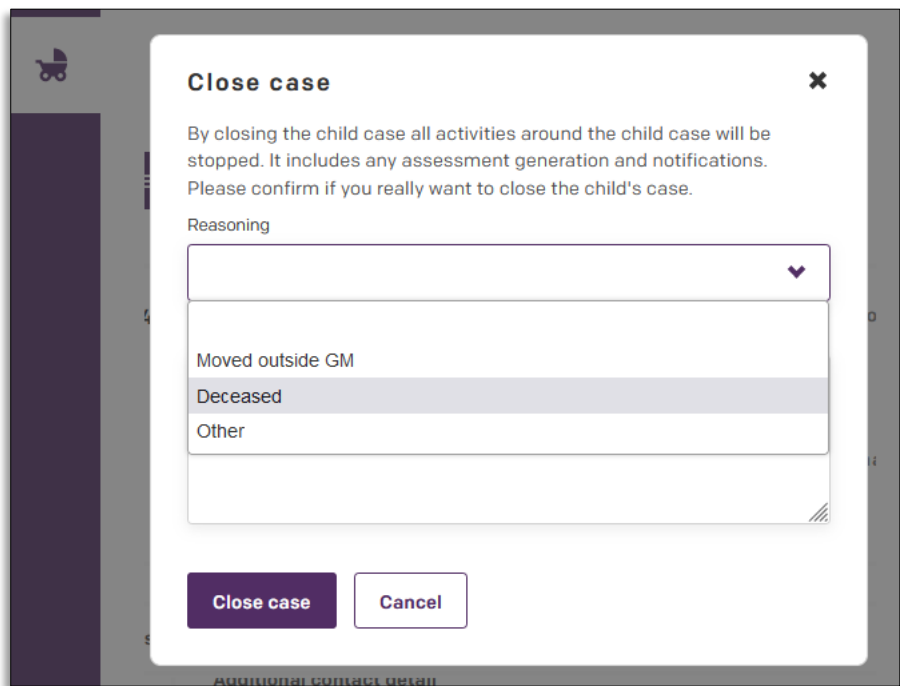
Form	Due date	Created	Category	Filled in by	Completion	Status
ASD-3 & Month Questionnaire	07/10/2023	08/08/2023, 10:55	Child	Administrator TEST Stockport	97%	SUBMITTED

If a child assessment is open a prompt will ask if you want to proceed. Click Cancel to go back to the child details page or **click** **Proceed** to close the case.



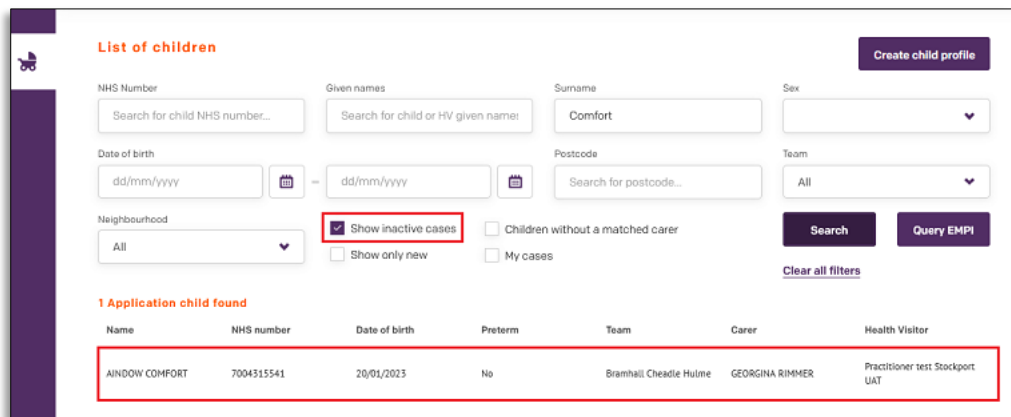
A dialog box titled "Close case" with a close button (X) in the top right corner. The text inside says: "This child has an open assessment. Do you wish to proceed and close case anyway?". At the bottom, there are two buttons: "Proceed" (highlighted with a red box) and "Cancel".

Select **Deceased** or **Other** from the **Reasoning** drop down list, enter any further details in the Description box and **click** **Close case**.



A dialog box titled "Close case" with a close button (X) in the top right corner. The text inside says: "By closing the child case all activities around the child case will be stopped. It includes any assessment generation and notifications. Please confirm if you really want to close the child's case." Below this is a "Reasoning" dropdown menu. The dropdown is open, showing three options: "Moved outside GM", "Deceased" (highlighted), and "Other". At the bottom, there are two buttons: "Close case" and "Cancel".

To view the profile **Click** **Show Inactive Cases**, enter the search criteria in this case (Comfort) and **click** **search**. Select the profile.



A search page titled "List of children" with a "Create child profile" button in the top right corner. The page contains several search filters: "NHS Number" (text input), "Given names" (text input), "Surname" (text input with "Comfort" entered), "Sex" (dropdown), "Date of birth" (date range), "Postcode" (text input), "Team" (dropdown), "Neighbourhood" (dropdown), "Show inactive cases" (checkbox, checked and highlighted with a red box), "Children without a matched carer" (checkbox), "Show only new" (checkbox), and "My cases" (checkbox). There are "Search" and "Query EMPI" buttons, and a "Clear all filters" link. Below the filters, it says "1 Application child found". A table lists the child's details, with the first row highlighted by a red box:

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
AINDOW COMFORT	7004315541	20/01/2023	No	Bramhall Cheadle Hulme	GEORGINA RIMMER	Practitioner test Stockport UAT

The child details profile will now state ‘**case closed**’ and the reason why.

**Child details**

NOTES AVAILABLE

Back to children Export All Reopen case

**Case closed**

Reasoning: Deceased  
Description: Close Case TEST

AINDOW COMFORT (35 week(s) old)  
NHS 7004315541  
[Go to details](#)

Date of birth: 20/01/2023  
Carer: GEORGINA RIMMER  
Preterm: No  
Contact details not confirmed

## Reopen a Case

‘Click’ ‘**Show Inactive Cases**’, enter the search criteria in this case (Andrew) and ‘click’ ‘**search**’. ‘Click’ the profile.

**List of children**

Create child profile

NHS Number: Search for child NHS number...  
Given names: Search for child or HV given name:  
Surname: Comfort  
Sex:   
Date of birth: dd/mm/yyyy - dd/mm/yyyy  
Postcode: Search for postcode...  
Team: All  
Neighbourhood: All  
☒ Show inactive cases  
☐ Children without a matched carer  
☐ Show only new  
☐ My cases  
Search Query EMPI  
Clear all filters

1 Application child found

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
AINDOW COMFORT	7004315541	20/01/2023	No	Bramhall Cheadle Hulme	GEORGINA RIMMER	Practitioner test Stockport UAT

**Note:** If you click ‘**Moved outside GM**’ you will not be able to reopen the case or show inactive cases. You will need to contact the ‘**gmdp.support@nhs.net**’ with the child’s information if a mistake was made.

If the case was closed because the child is deceased, a confirmation pop up box will display asking you to confirm that you want to reopen the profile.

**Child details**

NOTES AVAILABLE

Back to children Export All Reopen case

**Reopen case**

This record has been marked as deceased. Are you sure you want to reopen it?

Yes No

AINDOW COMFORT (35 week(s) old)  
NHS 7004315541

Date of birth: 20/01/2023  
Carer: GEORGINA RIMMER

**Note:** You don’t need to close the case if the child moves to an area who is also using Early Years. Instead, raise a request at ‘**gmdp.support@nhs.net**’ IT Service Desk and ask them to change the child’s locality. They will forward the request to systems administrators who have permissions to make this change in the system. Please provided the request to change child’s locality, **child name, NHS number, child DOB and new locality name**.

## Edit details for a child, parents, GP and Carer

In the Childs details profile, you can edit details for a child, parent and GP. 'Click' 'Go to details'.

Child details

Back to children

Export All

Close case

KINGHORN Ozzy (19 week(s) old)

NHS 4159156118

Go to details

Date of birth

07/05/2023

Preterm:

No

Carer

ALIX ASCIC

Contact details not confirmed

Phone

7725479081

Email

unknown@aswxemail.com

Address

FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL BRAMHALL, STOCKPORT

Additional contact details

Health visitor: sky Storm

Phone number: -

Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

Selected forms

Outcome

Assessments configuration

Documents

Settings

Selected forms

Child's age

0-60 months

Ignore overdue forms with 0% completion

Form	Due date	Created	Category	Filled in by	Completion	Status
ASO-3 4 Month Questionnaire	07/10/2023	08/08/2023, 10:55	Child	Administrator TEST Stockport	97%	SUBMITTED

Notes

Category

Please enter your note here...

In the Child details page 'click' 'Edit'.

Child details EMPI

Query EMPI

Query EMPI response

Child details

Edit

KINGHORN Ozzy

Personal details

NHS: 4159156118

Sex: Female

Ethnicity: Pakistani

Level of Need: Universal

Birth details

Date of birth: 07/05/2023

Place of birth: STOCKPORT

Time of birth: 17:51

Preterm: No

Birthweight [g]: 4036

Apgar score at 1 min: 6

Apgar score at 5 min: 9

Locality: Stockport

Neighbourhood: Unknown

Team: Bramhall Cheadle Hulme

Parental consent

Edit

Consent granted: Yes

Modification date: 05/09/2023, 10:35

Modified by: Administrator TEST Stockport

Make the relevant changes and select **‘Submit’** or select **‘Next’** to make changes to another section.

**Child details**

Step 1: Child details | Step 2: Parent details | Step 3: Health Care Professionals details

**Mandatory fields:** NHS number, given names, surname, sex, ethnicity, team, date of birth, number of weeks (if preterm), place of birth, locality, address, neighbourhood

**Personal details**

NHS number: 415 915 6118

Parental consent: ☒ Yes ☐ No [Find out more](#)

Given names:

Surname:

Date of birth (D.O.B.): 07/05/2023

Sex: ☐ Male ☒ Female

In the Next Sections you can **‘assign/update’** the **‘child’s Carer’** and **‘Health Visitor’**. This is also covered in **‘Create a child profile’** section of the help guide.

Step 1: Child details | Step 2: Parent details | Step 3: Health Care Professionals details

**1st Parent's details**

**Mandatory fields:** NHS number, given names, surname, date of birth, language, address (if different than child's)

**Personal details**

NHS number: 944 930 9973

☒ **Success**

**This person already exists in the system.**

☐ Reassign this person as a Carer to this child?  
(You will be able to change this anytime on the child's profile)

☒ **Select if you wish to edit the fields below**

Preferred pronouns:

Given names:

Surname:

Date of birth (D.O.B.): 09/09/1981

**Note:** Tick Select if you wish to edit the fields below box.



## To retrospectively assign the mother as the carer of the child

Select Edit next to the Parents details section of the **‘Go to details’** page, select the below **‘checkbox’** and select Submit at the bottom of the page.

**Child details**

Step 1 Child details | Step 2 Parent details | Step 3 Health Care Professionals details

**1st Parent's details**

**Information**

This person does not exist in the system.

Would you like to:

☒ Create an account for this person and assign him/her as a Carer to this child?

After selecting this checkbox, click on Submit at the bottom of the page to complete this action

Preferred pronouns: She/Her

Given names:

Surname:

Date of birth (D.O.B):

If you perform this step for a child whose profile data was copied across from Child Health during the bulk upload, you'll see the **‘Populate data to this form’** button but just ignore this. You'd only need to select this button if you changed the Parent's NHS number to the NHS number of a different Carer already in the system – by selecting **‘Populate data to this form’** it would automatically update the Parent record with the new person's details.

**Success**

This person already exists in the system as a Carer.

Would you like to?

**Populate data to this form**

☒ Assign this person as a Carer to this child?

(You will be able to change this anytime on the child's profile)

**Note:** To change the child's team. Firstly, you must unassign the health visitor from the child (in the Health Visitor section of this **‘Go to details’** page, select Update then select the Unassign button). You'll then be able to edit the Team field in the child's profile.

## Edit Carer details

In the '**Carers'/'Users'** menu (depending on your user role), search for the Carer and open their profile from the search results.

Make the required changes and click on **Save** at the bottom of the page.

## Notes on editing Parent/Carer contact details

### Changing the address

You can edit the child's address by editing the '**Child**' section on the '**Go to details**' page

If the mother's address is different from the child's address and you need to change the mother's address, edit the '**Parent**' section on the '**Go to details**' page

You can change the address of the '**Carer**' by editing the Carer profile in the '**Carers'/'Users'** menu (depending on your user role)

**Note:** If the '**Parent**' is also the '**Carer**' to the child, you'll need to edit the address in the '**Go to details**' page and in the '**Carer**' profile in the '**Carers'/'Users'** menu.

### Changing parent/carers phone number

To edit the '**Parent**' phone number, edit the 'Parent' section of the '**Go to details**' page

To edit the '**Carer**' phone number, edit the Carer profile in the '**Carers'/'Users'** menu (depending on your user role)


**Note:** If the 'Parent' is also the 'Carer' to the child, you'll need to edit the phone number in the 'Go to details' page and in the 'Carer' profile in the 'Carers'/'Users' menu

### Changing parent/carers email address

To edit the 'Parent' email address, edit the 'Parent' section of the 'Go to details' page

To edit the 'Carer' email address, edit the Carer profile in the 'Carers'/'Users' menu (depending on your user role) and click on 'Save'

You would only need to select **'Save and resend activation link'** if the Carer doesn't yet have an Early Years account because the account activation email was originally sent to the wrong Carer email address. In this situation, if you change the Carer email address and select **'Save and resend activation link'**, an email will be sent to the newly added Carer email address inviting them to create their account.



☒ 12B, FIR ROAD, BRAMHALL,  
STOCKPORT, SK72NP

[I can't find an address / Edit address](#)


Phone and email details

☒ Mobile ☐ Landline

Mobile number

Email

☒ Contact details confirmed with carer during visit



Once you select 'Contact details confirmed with carer during visit' tick box, phone number is required. You need to confirm contact details in order to allow account activation for the User.

Cancel

Save

Save and resend activation link

**Note:** If the **'Parent'** is also the **'Carer'** to the child you'll need to change their email address within the **'Parent'** section of the **'Go to details'** page and within the **'Carer'** profile in the **'Carers'/'Users'** menu.

## Assign, change or remove a carer or HV from within the child profile

In the Childs details profile, you can **'assign', 'change' or 'remove a carer'** from within the child profile. Search for the child in the Children menu and in the search results select their record to open their profile. **'Click' 'Go to details'**.

Child details

[Back to children](#)
[Export All](#)
[Close case](#)

KINGHORN Ozzy (19 weeks (s) old)

NHS 4159154118

Go to details

Date of birth

07/05/2023

Preterm:

No

Carer

ALEX ASCIC

Contact details not confirmed

Phone

7725479081

Email

unknown@eswsemail.com

Address

FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL BRAMHALL, STOCKPORT

Additional contact details

Health visitor: [sly Storm](#)

Phone number: -

Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

Selected forms

Outcome

Assessments configuration

Documents

Settings

Selected forms

Child's age

0-60 months

☒ Ignore overdue forms with 0% completion

Form	Date due	Created	Category	Filled by	Completion	Status
<a href="#">ASQ-3 &amp; Month Questionnaire</a>	07/10/2023	08/08/2023, 10:55	Child	Administrator TEST Stockport	97%	<a href="#">SUBMITTED</a>

Notes

Category

▼

Please enter your note here...

In the 'Assigned Carer' section 'Click' 'Update'.

**Child details** [Edit](#) Export

**KINGHORN Ozzy**

**Personal details**  
NHS: 4159156118  
Sex: Female  
Ethnicity: Pakistani  
Level of Need: Universal

**Birth details**  
Date of birth: 07/05/2023  
Place of birth: STOCKPORT  
Time of birth: 17:51  
Preterm: No  
Birthweight (g): 4036  
Apgar score at 1 min: 6  
Apgar score at 5 min: 9

**Address details**  
Apartment 1, 3 Carrwood Road,  
Bramhall, STOCKPORT, SK73EE

**Parental consent** [Edit](#)  
Consent granted: No  
Modification date: 25/09/2023, 15:49  
Modified by: Administrator TEST Stockport

**Assigned Carer:** Blue Bird Update

**Parents details** [Edit](#)

**1st Parent's details** [Go to parent's profile](#)

**Personal details**  
Preferred Pronouns: Not stated  
Full name: Blue Bird  
NHS: 9449309973

**Contact details**  
Mobile number: 7725479081  
Email address: Changeacar@yaho.com

**Address details**  
Apartment 1, 3 Carrwood Road,  
Bramhall, STOCKPORT, SK73EE

**Health care professional's details**

**Health visitor** [Update](#)  
Assigned Health Visitor: sky Storm

**GP** [Edit](#)

**Personal details** **Contact details** **Address details**

In the Assign Carer pop up box search for the carer, select their entry in the search results and select 'Confirm'.

Or select 'Unassign' if you wish to remove the existing carer from the child without yet assigning a new one (e.g. if the child is in the process of being placed into foster care and you need to prevent the existing Carer from accessing the child's records in Early Years)

**Assign Carer** ×

Search

Abigayle Q

Given names	Surname	NHS number	Phone	Address
ABIGAYLE	REAVILL	9449303975		SOPERS COTTAGE, MARKEDGE LANE, CHIPSTEAD,

Cancel Confirm Unassign

## Assign a Health Visitor to a child from within the child profile

Once a Health Visitor has been assigned to a child, if you wish to assign a different Health Visitor or unassign a Health Visitor from a child without assigning a new one, you will need to go into the child profile.

Search for the child in the Children menu and in the search, results select their record to open their profile. **‘Click’ ‘Go to details’**.

Child details

[Back to children](#) [Export All](#) [Close case](#)

KINGHORN Ozzy (19 week(s) old)

NHS 4159156118

[Go to details](#)

Date of birth

07/05/2023

Preterm:

No

Carer

[ALIX ASCIC](#)

Contact details not confirmed

Phone

7725479081

Email

unknown@aswemail.com

Address

FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL BRAMHALL, STOCKPORT

Additional contact details

Health visitor: [sky Storm](#)

Phone number: -

Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

Selected forms

Outcome

Assessments configuration

Documents

Settings

Selected forms

Child's age

0-60 months

☒ Ignore overdue forms with 0% completion

Form	Due date	Created	Category	Filled in by	Completion	Status
<a href="#">ASQ-3 4 Month Questionnaire</a>	07/10/2023	08/08/2023, 10:55	Child	Administrator TEST Stockport	97%	<a href="#">SUBMITTED</a>

Notes

Category

Please enter your note here...

In the **‘Health Visitor’** section **‘Click’ ‘Update’**

Child details [Edit](#)

[Export](#)

KINGHORN Ozzy

Personal details

NHS: 4159156118

Sex: Female

Ethnicity: Pakistani

Level of Need: Universal

Birth details

Date of birth: 07/05/2023

Place of birth: STOCKPORT

Time of birth: 17:51

Preterm: No

Birthweight (g): 4036

Apgar score at 1 min: 6

Apgar score at 5 min: 9

Address details

Apartment 1, 3 Carrwood Road, Bramhall, STOCKPORT, SK73EE

Parental consent [Edit](#)

Consent granted: No

Modification date: 25/09/2023, 15:49

Modified by: Administrator TEST Stockport

Assigned Carer: [Blue Bird](#) [Update](#)

Parents details [Edit](#)

1st Parent's details [Go to parent's profile](#)

Personal details

Preferred Pronouns: Not stated

Full name: Blue Bird

NHS: 9449309973

Contact details

Mobile number: 7725479081

Email address: Changeacarier@yahoo.com

Address details

Apartment 1, 3 Carrwood Road, Bramhall, STOCKPORT, SK73EE

Health care professional's details

Health visitor [Update](#)

Assigned Health Visitor: sky Storm

OP [Edit](#)

Personal details

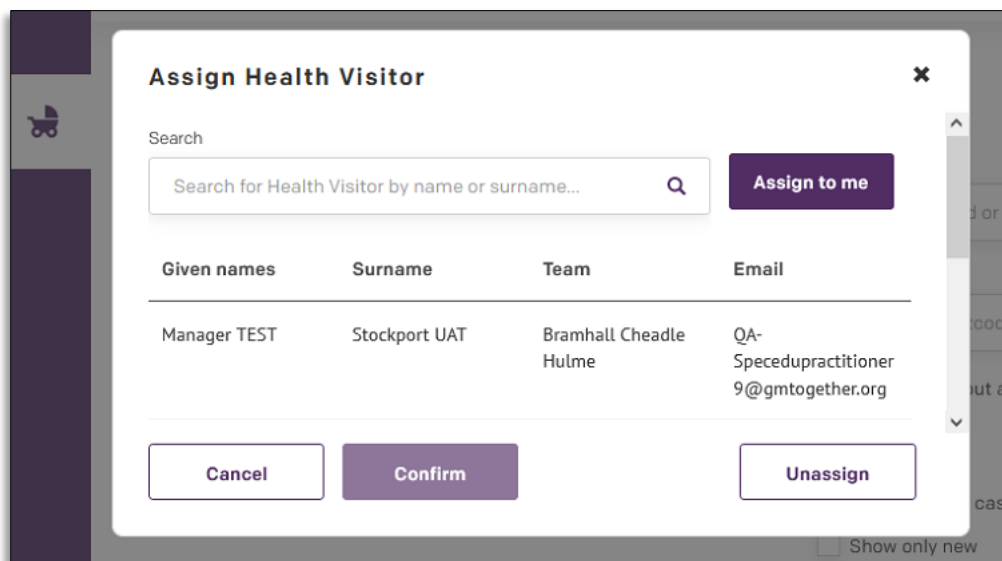
Contact details

Address details

In the Assign Health Visitor pop up window search for the **‘Health Visitor’** you wish to assign, select their name in the search results so the record is highlighted and select **‘Confirm’**.

Health Visitors can also select **‘Assign to me’** as a quick way to assign the child to themselves.

You can also select **‘Unassign’** so the child will not be assigned to any Health Visitor (e.g if you want the child to go into a general pool when it turns one year old).



The 'Assign Health Visitor' modal window features a search bar at the top with the placeholder text 'Search for Health Visitor by name or surname...'. To the right of the search bar is an 'Assign to me' button. Below the search bar is a table with the following data:

Given names	Surname	Team	Email
Manager TEST	Stockport UAT	Bramhall Cheadle Hulme	QA-Specedupractitioner9@gmtogether.org

At the bottom of the modal are three buttons: 'Cancel', 'Confirm', and 'Unassign'. A 'Show only new' checkbox is located at the bottom right of the modal.

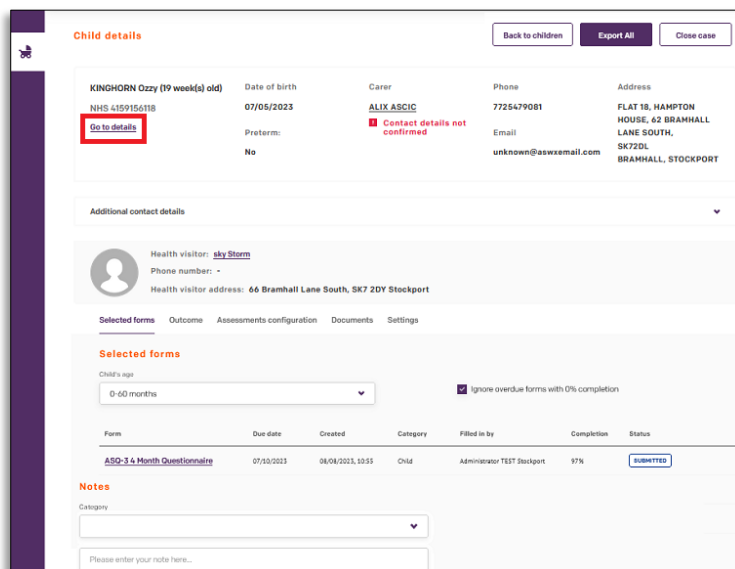
## Confirm Carer contact details to enable them to access Early Years

A member of the health visiting team needs to contact the Carer assigned to a child to confirm that their mobile number and email address are listed correctly in Early Years. This is an essential step to enable the Carer to create their Early Years account.

Health Visitors will need to incorporate this step into the new birth/primary visit. It will be decided within your team who will do this for older children. Whoever is required to do this task will need to follow the below instructions.

**Note:** Health Visitors can only perform this task on the web browser version of Early Years (as it's not possible to edit information on the app).

Search for the child in the Children menu and in the search, results select their record to open the profile. **‘Click’ ‘Go to details’**.



The 'Child details' page for KINGHORN Ozzy (19 weeks old) displays the following information:

- Child details:** KINGHORN Ozzy (19 weeks old), NHS 415915618, Date of birth 07/05/2023, Preterm: No.
- Carer:** ALIX ASCIC, Contact details not confirmed.
- Phone:** 7725479081
- Address:** FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL, BRAMHALL, STOCKPORT
- Email:** unknown@aswsemail.com

Buttons at the top right include 'Back to children', 'Export All', and 'Close case'. A 'Go to details' button is highlighted with a red box. Below the main details is a section for 'Additional contact details' showing the Health visitor: sly Storm, Phone number: -, and Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport. The 'Selected forms' section shows a table with the following data:

Form	Due date	Created	Category	Filled in by	Completion	Status
ASQ-3.4 Month Questionnaire	07/10/2023	08/08/2023, 10:55	Child	Administrator TEST Stockport	97%	SUBMITTED

At the bottom, there is a 'Notes' section with a category dropdown and a text area for notes.

Within the ‘child’s details profile’ if you see the ‘Contact details not confirmed’ warning message to the right of the child’s name, that tells you that the Carer’s contact details have not yet been verified and therefore the Carer will not yet be able to access Early Years.

Children / Profile of KINGHORN Ozzy

Back to children

Export All

Close case

Child details

KINGHORN Ozzy (20 week(s) old)

NHS 4159156118

[Go to details](#)

Date of birth

07/05/2023

Preterm:

No

Carer

Lucy Ricardo

Contact details not confirmed

Phone

7725479081

Email

Changecarer@yahoo.com

Address

Apartment 1 3  
Carrwood Road,  
SK73EE  
Bramhall,  
STOCKPORT

Additional contact details

Health visitor: [sky Storm](#)

Phone number: -

Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

Selected forms

Outcome

Assessments configuration

Documents

Appointments

Settings

Selected forms

Child's age

0-60 months

☒ Ignore overdue forms with 0% completion

‘Click’ the ‘Carer’s name’ (Lucy Ricardo) to open their profile.

Children / Profile of KINGHORN Ozzy

Back to children

Export All

Close case

Child details

KINGHORN Ozzy (20 week(s) old)

NHS 4159156118

[Go to details](#)

Date of birth

07/05/2023

Preterm:

No

Carer

Lucy Ricardo

Contact details not confirmed

Phone

7725479081

Email

Changecarer@yahoo.com

Address

Apartment 1 3  
Carrwood Road,  
SK73EE  
Bramhall,  
STOCKPORT

Additional contact details

Health visitor: [sky Storm](#)

Phone number: -

Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

Selected forms

Outcome

Assessments configuration

Documents

Appointments

Settings

Selected forms

Child's age

0-60 months

☒ Ignore overdue forms with 0% completion

**Note:** you can also access the Carer profile directly from the ‘Carers’/‘Users’ menu (depending on your user role). You can enter the Carer’s name in the Search field.

You will now be in the Carer details page. On this page you can also view which children are assigned to the carer. **‘Click’ ‘Edit’**.

Carer details

Edit

Lucy Ricardo

NHS 9449309973

Date of birth 09/09/1981

Contact details

7725479081

Changecarer@yahoo.com

Address

Apartment 1 3  
Carrwood Road,  
SK73EE Bramhall,  
STOCKPORT

Children details

Forms

Assessment configuration

KINGHORN Ozzy

NHS 4159156118

Current period

Forms in progress

New forms

2-9 months

2

1

Last edited form: ASQ-3

Continue

Scroll down to the **‘phone number and email details’** section. Ask the Carer to confirm their mobile phone number, email address and ensure they are listed accurately in Early Years.

**‘Tick’ ‘Contact details confirmed with carer during visit’** checkbox. **‘Click’ ‘Save’** to update the record.

Given names

Lucy

Surname

Ricardo

Date of birth (DD/MM)

09/09/1981

Sex

Male

Female

Search for a person

Locality

Stockport

Contact details

Address details

Address lookup (search by post code)

Find address

Apartment 1, 3 Carrwood Road, Bramhall, STOCKPORT, SK73EE

I can't find an address / Edit address

Phone and email details

Mobile

Landline

Mobile number (optional)

7725479081

Email (optional)

Changecarer@yahoo.com

Contact details confirmed with carer during visit

Once you select 'Contact details confirmed with carer during visit' tick box, phone number is required. You need to confirm contact details in order to allow account activation for the User.

Cancel

Save



## Changing the mother's contact details

If the child's carer is also the mother to the child, you will need to ensure their mobile number and email address are also updated on the mother's record as the system won't update it automatically.

Search for the child in the Children menu. In the search results select their record to open the profile. **'Click' 'Go to details'.**

**Child details** [Back to children](#) [Export All](#) [Close case](#)

**KINGHORN Ozzy (19 week(s) old)**

NHS: 4159156118	Date of birth: 07/05/2023	Carer: <a href="#">ALIX ASCIC</a>	Phone: 7725479081	Address: FLAT 18, HAMPTON HOUSE, 62 BRAMHALL LANE SOUTH, SK72DL, BRAMHALL, STOCKPORT
<a href="#">Go to details</a>	Preterm: No	Contact details not confirmed	Email: unknown@saswemail.com	

**Additional contact details**

Health visitor: [sky Storm](#)  
Phone number: -  
Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

**Selected forms** [Outcome](#) [Assessments configuration](#) [Documents](#) [Settings](#)

Child's age: 0-60 months ☐ Ignore overdue forms with 0% completion

Form	Due date	Created	Category	Filled in by	Completion	Status
<a href="#">ASQ-3 4 Month Questionnaire</a>	07/10/2023	08/08/2023, 10:53	Child	Administrator TEST Stockport	97%	<a href="#">SUBMITTED</a>

**Notes**

Category:

Please enter your note here...

In the Child details page next to the **'Parent details'** **'Click' 'Edit'.**

**Child details** [Edit](#) [Export](#)

**KINGHORN Ozzy**

**Personal details**  
NHS: 4159156118  
Sex: Female  
Ethnicity: Pakistani  
Level of Need: Universal

**Birth details**  
Date of birth: 07/05/2023  
Place of birth: STOCKPORT  
Time of birth: 17:51  
Preterm: No  
Birthweight (g): 4036  
Apgar score at 1 min: 6  
Apgar score at 5 min: 9

**Address details**  
Apartment 1, 3 Carrwood Road, Bramhall, STOCKPORT, SK73EE

**Parental consent** [Edit](#)  
Consent granted: No  
Modification date: 25/09/2023, 15:49  
Modified by: Administrator TEST Stockport

**Assigned Carer:** Blue Bird [Update](#)

**Parents details** [Edit](#)

**1st Parent's details** [Go to parent's profile](#)

<b>Personal details</b> Preferred Pronouns: Not stated Full name: Blue Bird NHS: 9449309973	<b>1st Parent's details</b> Ethnicity: - Language: - Date of birth: 09/09/1981	<b>Contact details</b> Mobile number: 7725479081 Email address: ChangeCarer@yahoo.com	<b>Address details</b> Apartment 1, 3 Carrwood Road, Bramhall, STOCKPORT, SK73EE
--	---	---	---

**Health care professional's details**

**Health visitor** [Update](#)  
Assigned Health Visitor: sky Storm

**GP** [Edit](#)

**Personal details** **Contact details** **Address details**

Scroll down to the **‘Phone and email details’** section and amend the mobile phone number and email address as necessary. **‘Click’ ‘Submit’** to update the mother’s details.

Given names  
Lucy

Surname  
Ricardo

Date of birth (D.O.B.)  
09/09/1981

[Search for a person](#)

Ethnicity (optional)

Language

**Contact details**

Address details

☐ 1st parent has a different address to the child

**Phone and email details**

☒ Mobile ☐ Landline

Mobile number (optional)  
7725479022

Email (optional)  
Newemailaddress@yahoo.com

**2nd parent's details (optional)**

☐ Provide 2nd parent's details

[Cancel](#) [Back](#) [Next](#) [Submit](#)

### Note: Next steps for parent/carers

An automatic email and text message will now be sent to the Carer with a link to create their account. Once they've created their account and have logged in to Early Years, they don't need to take any further action at that stage. They will be sent an email when they're required to complete an assessment form.

### Further help for parent/carers

During the process of confirming the contact details with the Carer (either during the new birth visit or on the phone), you can email them the parent/carer PDF leaflet. The leaflet contains a web address where they can read more information about Early Years and view help guides on how to create their account and complete the online assessment forms.

Please contact your Health Visitor if you have any health concerns relating to your child, or if you need to change your contact details that are displayed in the application.

If you encounter any difficulties or technical issues using the application then please let your Health Visitor know, so they can seek assistance from the service desk.

## Adding Case Notes to a Child Profile

If you want to make a note on the child's profile in Early Years with any details e.g to mention difficulties in contacting the Carer or if the Carer doesn't have an email address for example so cannot create their account.

Notes will not be visible to Carers.

A Health Visitor will receive a notification if a Health Visitor Manager or another Health Visitor adds a case note to a child in their caseload (although they will not be able to respond to the note on the application).

In the Children menu search for the child and open their profile. Scroll to the bottom of the page 'click' the 'note' drop down menu and add the note.

KINGHORN Ozzy (20 week(s) old)

NHS 4159156118

[Go to details](#)

Date of birth: 07/05/2023

Preterm: No

Carer: Lucy Ricardo

Contact details not confirmed

Phone: 7725479081

Email: Changeocarer@yahoo.com

Additional contact details

Health visitor: sky Storm

Phone number: -

Health visitor address: 66 Bramhall Lane South, SK7 2DY Stockport

Selected forms: Outcome, Assessments configuration, Documents, Appointments, Settings

Selected forms

Child's age: 0-60 months

☒ Ignore overdue forms with 0% completion

Form	Due date	Created	Category	Filled in by	Completion	Status
ASQ-3 4 Month Questionnaire	07/10/2023	08/08/2023, 10:55	Child	Administrator TEST Stockport	97%	SUBMITTED
ASQ-3 4 Month Questionnaire	07/10/2023	08/08/2023, 10:55	Child		0%	IN PROGRESS
ASQ-SE-2 6 Month Questionnaire	04/01/2024	07/08/2023, 06:05	Child		0%	NEW

**Notes**

Category:

Please enter your note here...

Add note

All case notes will appear at the bottom of the child's profile page in date order.

At the top of the profile page it will now say 'Notes Available' under the Child Details heading so you're aware that notes have been added.

**Notes**

Category:

Please enter your note here...

Add note

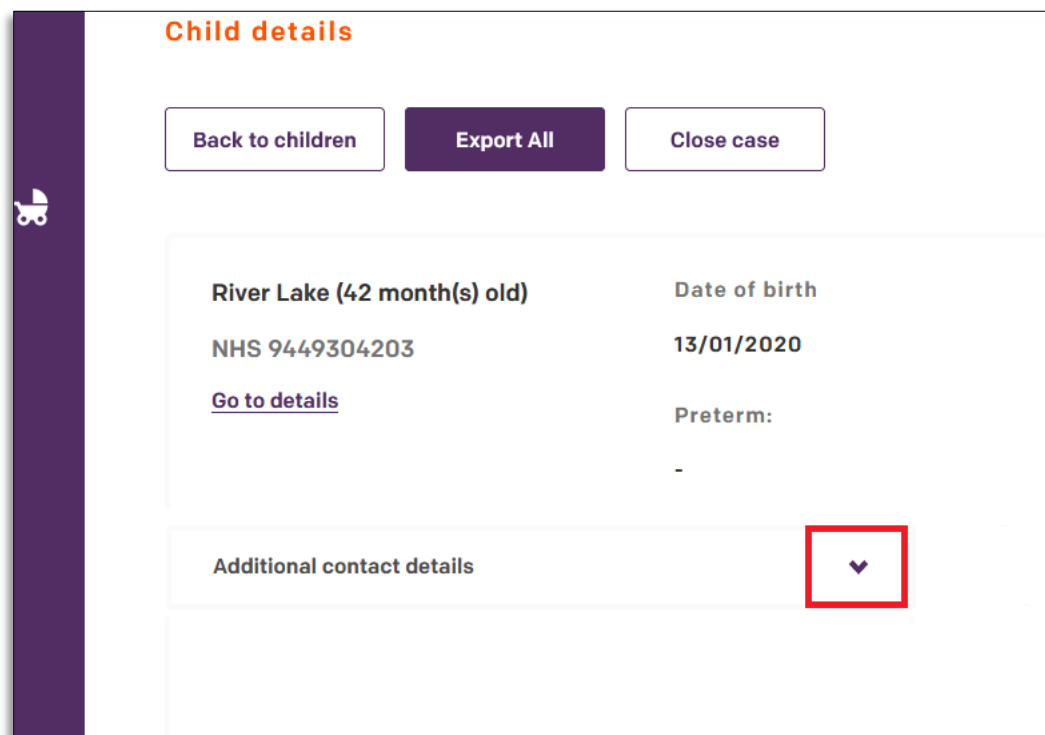
This is the best help guide

Category: General

Administrator TEST Stockport, 28/09/2023, 10:15

## Additional Contact Details

To add details for the main carer (e.g. the mother or foster carer) who staff would contact to arrange the child's assessments, **'click'** the **'downward arrow'** in the **'Additional contact details'** field and **'click'** on either **'Add'** (if there are no details in that section) or **'Edit'** if there are already details in there but you want to change them. You can add optional details of a second carer in the **'Notes'** field.




**Child details**

[Back to children](#) [Export All](#) [Close case](#)

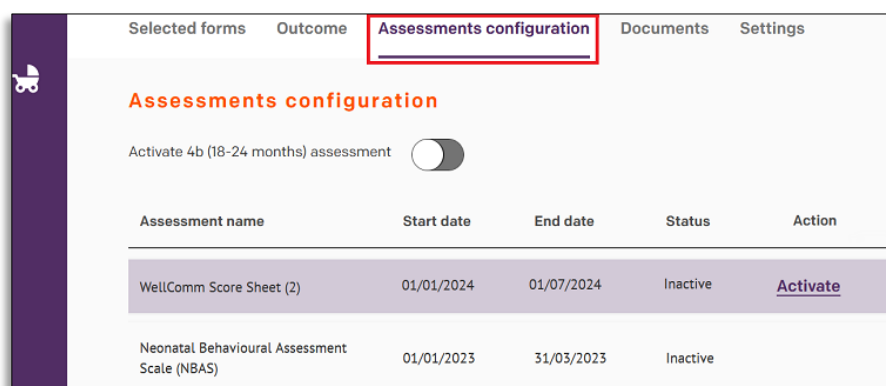
**River Lake (42 month(s) old)** **Date of birth**  
**NHS 9449304203** **13/01/2020**

[Go to details](#) **Preterm:**  
-

**Additional contact details** 

## Selected Forms

**'Click'** **'Assessments Configuration'** within the child's profile which contains a list of digitized assessment forms.



Selected forms Outcome **Assessments configuration** Documents Settings

**Assessments configuration**

Activate 4b (18-24 months) assessment ☐

Assessment name	Start date	End date	Status	Action
WellComm Score Sheet (2)	01/01/2024	01/07/2024	Inactive	<a href="#">Activate</a>
Neonatal Behavioural Assessment Scale (NBAS)	01/01/2023	31/03/2023	Inactive	

Scroll down the list to the appropriate form for the child’s age and ‘click’ ‘**Activate**’. You can now find the active form in the Selected forms tab. You can also ‘**Deactivate**’ a form.

Selected forms Outcome **Assessments configuration** Documents Settings

**Assessments configuration**

Activate 4b (18-24 months) assessment ☐

Assessment name	Start date	End date	Status	Action
WellComm Score Sheet (2)	01/01/2024	01/07/2024	Inactive	<a href="#">Activate</a>
ASQ-3 8 Month Questionnaire	01/08/2023	01/10/2023	Active	<a href="#">Deactivate</a>

**Note:** You can ‘**Activate**’ forms for future assessment periods however the form will only be visible in the ‘**Selected Forms tab**’ once the child enters the ‘**start date**’ of that assessment period.

Forms cannot be activated if they are from a child’s previous assessments period.

If a version of that form for the same assessment period has previously been activated and appears in the Selected Forms tab you can still activate a additional instance of the form if you wish by clicking ‘**Add New**’.

Selected forms Outcome **Assessments configuration** Documents Settings

**Assessments configuration**

Activate 4b (18-24 months) assessment ☐

Assessment name	Start date	End date	Status	Action
WellComm Score Sheet	01/07/2023	31/12/2023	Active	<a href="#">Add new</a>
Neonatal Behavioural Assessment Scale (NBAS)	01/01/2023	31/03/2023	Inactive	

‘Click’ the ‘**Selected forms**’ tab in the child’s profile to view the ‘**Activated**’ or a ‘**Add new form**’.

**Selected forms** Outcome Assessments configuration Documents Settings

**Selected forms**

Child's age: 0-60 months ☐ Ignore overdue forms with 0% completion

Form	Due date	Created	Category	Filled in by	Completion	Status
<a href="#">WellComm Score Sheet</a>	31/12/2023	28/07/2023, 22:23	Child	Administrator TEST Stockport	100%	<a href="#">FINISHED</a>
<a href="#">ASQ:SE-2 6 Month Questionnaire</a>	01/10/2023	28/07/2023, 22:21	Child		0%	<a href="#">NEW</a>

**Note:** You can also view historical and other ‘In progress’ assessment forms in Selected Forms. You can only view forms completed by health visiting teams if parental consent for the data sharing has been granted.

**‘Click’** the form you want to access.

Form	Due date	Created	Category	Filled in by	Completion	Status
WellComm Score Sheet	31/12/2023	28/07/2023, 22:23	Child	Administrator TEST Stockport	100%	FINISHED
ASQ:SE-2 6 Month Questionnaire	01/10/2023	28/07/2023, 22:21	Child		0%	NEW

**‘Click’** the **‘Outcome’** tab on the child’s profile or add a **‘Note’**. An Outcome Record is an optional functionality which enables you to record interventions or referrals made for a child at each assessment stage, for children with additional support needs. It forms a cumulative record of the child’s history that moves through all the stages of a child’s development. It can be shared with other Early Education settings e.g. schools/nurseries, to increase early intervention and avoid duplication of assessments.

Outcome	Created	Created by	Last update	Last update by	Export
No items found					

**Notes**

Category

Please enter your note here...

Add note

**Note:** An Outcome Record is a optional functionality which enables you to record interventions or referrals made for a child at each assessment stage, for children with additional support needs. It forms a cumulative record of the child’s history that moves through all the stages of a child’s development. It can be shared with other Early Education settings e.g. schools/nurseries, to increase early intervention and avoid duplication of assessments.

**‘Click’ ‘Add new Outcome Item’.** **‘Tick’ the ‘Share with Carer’ box** if the Carer should have access. You can make the Outcome Record for a particular assessment period visible to the carer all the items in the Outcome Record for that particular assessment period will be shared.

The screenshot shows a web interface for managing an Outcome Record. At the top, it displays metadata: 'Created by: Manager TEST Stockport UAT', 'Last edited by: Manager TEST Stockport UAT', 'Last update: 31/07/2023', and 'Outcome title: 12-18 months'. There are 'Save' and 'Cancel' buttons. Below this is a 'Share result' section with a blue header 'Should Carer have access to the Outcome record?' and a checkbox labeled 'Share with Carer' which is highlighted with a red box. Underneath is a section titled 'Current Outcome Items' with a red box around an 'Add new Outcome Item' button. Below this is a table with columns 'Outcome Item', 'Created', 'Practitioner', and 'Comment', showing 'No items found'. A similar section for 'Past Outcome Items (read only)' is also present. At the bottom are 'Save' and 'Cancel' buttons.

**Note:** This only applies if the Carer has pre-existing access to the application.

Select an appropriate item from the drop-down list and add additional comments of the intervention made in the comments box and select **‘Save’**.

The screenshot shows a form titled 'Outcome Item'. It has a label 'Outcome item (select from dropdown list)' above a dropdown menu. The dropdown menu is open, showing 'Referral(s) to other service' and a red box around the downward arrow. Below the dropdown is a text area labeled 'Add additional comments (optional)'. At the bottom are 'Save' and 'Cancel' buttons.

**Note:** When the child enters the next assessment period, the Create Outcome button will appear again (within the Outcome tab on the child’s profile), enabling you to complete a new Outcome record for the new period

**‘Click’ ‘Export’** to download a data file. The exported information displays in a new window. If you exported the most recent Outcome Record it will display a cumulative record i.e. all current and all previous outcome items.

Selected forms **Outcome** Assessments configuration Documents Settings

**Outcome list**

Outcome	Created	Created by	Last update	Last update by	Export
12-18 months	31/07/2023	Manager TEST Stockport UAT	31/07/2023	Manager TEST Stockport UAT	<b>Export</b>

**Notes**

Category

## Uploading documents to a child’s profile

The **‘Documents’** tab within the children’s menu will allow you to **‘add’** and upload an attached file.

Selected forms Outcome Assessments configuration **Documents** Settings

**Attachments list**

Name	Created	Created by	Shared with Carer	Download
No items found				

**Notes**

Category

**‘Click’ ‘Browse’** to choose the file from your documents and **‘click’ ‘Save’**. In the Name field enter a title for the document.

**Upload attachment file**

Upload file

...

**Browse...**

Name

**Share result**

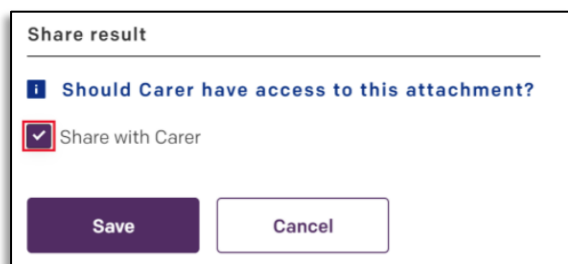
**i Should Carer have access to this attachment?**

☐ Share with Carer

**Save** **Cancel**



If you wish to share the document with the Carer select the Share with Carer checkbox and click on Save. You can also **'unselect'** the **'Share with Carer'** checkbox if you wish to remove the Carer's access to that document.



A dialog box titled "Share result" with a blue information icon. It contains the question "Should Carer have access to this attachment?" and a checked checkbox labeled "Share with Carer". At the bottom are "Save" and "Cancel" buttons.

The document is now saved in the child's profile. If you shared the document with the Carer, they will also be able to view it (and will receive an email notifying them a document has been shared with them).

To open a document in a child's profile click on Download.

Name	Created	Created by	Shared with Carer	Download
Health Checklist	21/03/2020	Mary Hughes	No	

To delete a document from a child's profile select the document title and in the Attachment Details pop up window select **'Delete'**. You can also unselect the Share with Carer checkbox if you wish to remove the Carer's access to that document.



A horizontal bar containing three buttons: "Save", "Cancel", and "Delete". The "Delete" button is highlighted with a red border.

## Early Years Video Links

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

Early Years App: <https://earlyyearshelp.greatermanchester.org.uk/index.html>

Searching For Children: [https://youtu.be/PHZ\\_YbdgKY4?si=7KnfNFTtTt1dXGSs](https://youtu.be/PHZ_YbdgKY4?si=7KnfNFTtTt1dXGSs)

Assessment Forms: [https://youtu.be/yr6S\\_u0UFuU?si=LnPRKOD33Lwqmn\\_c](https://youtu.be/yr6S_u0UFuU?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](https://youtu.be/sQd_RWBQevk?si=DavkcKnOjQrvxamr)

