













Early Years Child Development App

Managing Child Profiles

For: Health Visitors, Health Visitor Managers and Administrators

This help guide covers content in the **Children menu**  and shows you how to:

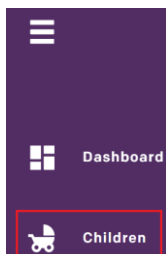
-  Create a new child profile (pg 1)
-  Search for children and view child profiles (pg 4-5)
-  Edit details for a child, parent, GP and carer (pg 6-8)
-  Export child profile data (pg 9)
-  Assign a Carer to a child (pg 10-11)
-  Assign a Health Visitor to a child (pg 12-13)
-  Add case notes to a child profile (pg 14)
-  Close and reopen a case; process to follow for locality moves (pg 15-17)
-  Uploading documents to child's profile (pg 18)
-  Confirm Carer contact details to enable account creation (pg 19) - and see separate help guide on '**Confirm Carer Contact Details**'

You can also view the separate help guides on '**Working With Forms**' which shows you how to complete assessment forms within the Children menu.

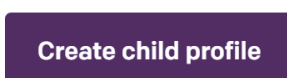
Create a new child profile

- 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.

- ➔ Select the **Children** menu



- ➔ At the top right of the screen select **Create child profile**



- ➔ Complete the fields for Step 1 (Child details).

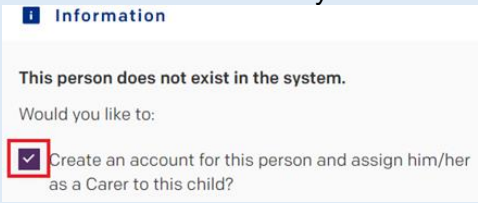
N.B:

- 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.

- ➔ Select **Next** and then complete the fields for Step 2 (Parent details)

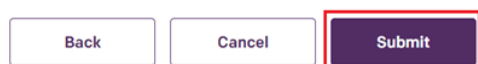
N.B:

- 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.
- When you enter the birth mother's NHS number, if the mother doesn't already exist in the system then a box will appear asking you 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 on.



- N.B. 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.
- You have the option on this page to select a different address for the mother if it differs from the child's and to provide details for a 2nd parent if required.

- ➔ Select **Next** to continue to Step 3, then add details for the child's G.P.
- ➔ Select **Submit**



A pop up box will appear 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.

- ➔ Select **Skip for now** if you want to assign a Carer and Health Visitor later on. If you want to assign them now, select **Assign**

Success!

You have successfully created the child's profile.

Would you like to assign a Carer and/or Health visitor to this child?

- ➔ 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

N.B 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, select their name from the search results so the record is highlighted and

Existing Health Visitor

Search

Chabah Abravanel

Given names	Surname	Team	Email
CHABAH	ABRAVANEL	Epsom	Testingmca17@outlook.com

- ➔ When you have made your selections click on **Confirm** at the bottom of the page

Search for children

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

➔ From the Children menu enter criteria in the search fields

The screenshot shows a search interface with the following elements:

- Search:** A text input field with the placeholder "Search for child, HV or NHS number..." and a magnifying glass icon.
- Team:** A dropdown menu currently set to "All".
- Date of birth:** A date picker showing "20/09/2017" with a calendar icon, followed by a minus sign and a format field "dd/mm/yy" with another calendar icon.
- Filters:** A list of checkboxes:
 - Children without a matched carer
 - My cases
 - Show inactive cases
 - Show only new

- In the **Search** field you can enter the child's name, NHS number or Health Visitor name. As soon as you start to populate the field, search results will appear in the section below.

By default the results will only show children aged 2 ½ years or younger. To view older children remove the date of birth filter before searching for the child.

A close-up of the date of birth filter. The date "05/01/2018" is entered in the date picker and is highlighted with a red rectangular box. The format "dd/mm/yy" is visible next to it.

- To view children who are assigned to a specific team select the team name from the **Team** dropdown list.
- To view a list of children who don't have a Health Visitor assigned select **Unassigned children** from the **Team** dropdown list

N.B. In the search results, some children have **New** next to their name and some don't

NEW	1111111307
George Everton	
Clara Parkin	7654433222

'New' indicates that the child has been newly added to Early Years (e.g. a new birth or a child who's moved in to the area), so it's likely a Health Visitor will need to be assigned. You can select the **Show only new** checkbox to display only these children in the search results.

Show only new

If the child's name doesn't have 'New' against it, that signifies that the child was previously assigned to a Health Visitor but was subsequently unassigned (e.g. if the child was placed into a general pool when it turned 1 years old). So it's probable no Health Visitor needs to be assigned to these children.

- Select the **Children without a matched carer** checkbox to view children who don't have a carer assigned
- Select the **Show inactive cases** checkbox to view profiles which have been closed
- Health Visitors can unselect the **My Cases** checkbox if they want to search for children in the wider locality (rather than just their caseload)

View child profiles

➔ To open a child's profile select the child in the search results

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
Simon Clark	9449303800	01/06/2020	1 weeks	Epsom	Billy Marvel	Mary Hughes

Within the child profile you can edit personal and contact details, add case notes, view and complete assessment forms and close a case (which is explained further in this help guide).

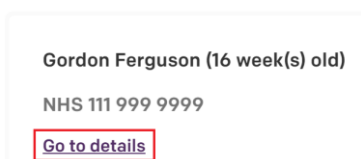
Edit details for a child, parents, GP and Carer

- You can edit details for a child, parent and GP from the 'Go to details' section within the child's profile
- You can edit details for a Carer in the Carer profile from the 'Carers'/'Users' menu (depending on your user role)
- Parents/carers cannot edit their details in Early Years – only a health practitioner can do so.
- If parents/carers change their mobile number or email address, as well as notifying a health practitioner so they can change the details in Early Years, the parent/carer will also need to update their details on their NHS Login account (instructions in their help guide on how to do this)
- Details can only be edited using the web browser i.e. Health Visitors cannot edit details using the App.

Edit details for a child/parent/GP

- ➔ Within the child's profile select **Go to details**

Child details



- ➔ Locate the section you wish to edit (e.g. Child details) and select **Edit** to the right of the heading

Child details **Edit**

- ➔ Make the relevant changes and select **Submit** (or select **Next** to make changes to another section)



You can also assign/update the child's Carer and Health Visitor on this page too, which is covered later in this help guide.

N.B.

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.

i 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?

N.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?

- Assign this person as a Carer to this child?

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

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)
- N.B. 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/carer 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)
- N.B. 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/carer 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.



N.B. 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

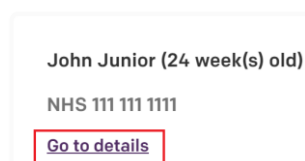
Export child profile data to PDF

- It's possible to export the personal and contact details for the child, carer and health practitioners into a PDF document that you can save or print.
- You also have the option to export all data contained in the child's profile, including assessment forms, Outcome Record and personal and contact details.

Export personal and contact details for child, carer and G.P.

- ➔ In the Children menu search for a child and open their profile
- ➔ Within the child's profile select **Go to details**

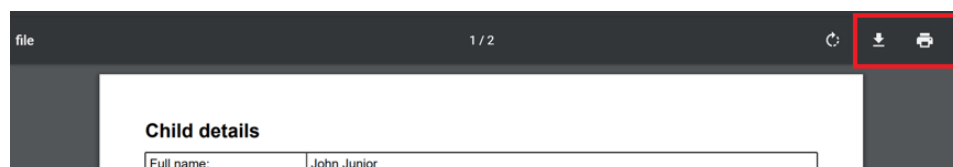
Child details



- ➔ Select the **Export** button at the top right of the screen and the web form will open



- ➔ At the top right of the form you have the option to **Download** the data in a PDF document which you can save locally or **Print** it



Export all data

- ➔ Open a child profile and at the top right of the screen select **Export All**



A pop up box confirms that an email has been sent to you (which can take up to 15 minutes to arrive) with a zip file containing all the data contained in the child's profile. This includes the assessment forms, Outcome record and personal and contact details. The link in the email is valid for 24 hours, after which time you will need to export the data again.

N.B. If a child moves to a different locality who don't use Early Years, you may want to use this 'Export All' function and forward the email with the zip file to the new locality, rather than posting hard copy files.

Assign a Carer to a child

- There are two ways to assign a Carer to a child in the Children menu:
 1. If the child doesn't yet have a Carer assigned then you can assign a carer from within the search results (after you've searched for the child), or you can do this within the child's profile.
 2. 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.

Assign a carer to a child from the search results

- ➔ From the Children menu search for the child you wish to assign a carer to

N.B. You can also search for all children without an assigned carer by selecting the **Children without a matched carer** checkbox

List of children

Search Team

Search for child, HV or NHS number... All

Date of birth

07/08/2017 dd/mm/y

Children without a matched carer

My cases

Show inactive cases

- ➔ In the search results select **Assign** in the Carer column of the child's record

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
Simi Parkinson	1239999118	11/10/2019	4 weeks	Radcliffe	Assign	Gwen Parker

- ➔ In the Assign Carer pop up box enter the name of carer in the Search field, select their name in the search results so the line is highlighted and select **Confirm**

Search

Claire Hughes

Given names	Surname	NHS number	Phone	Address
Claire	Hughes	111 110 1121	07884654442	17, Clarence Lance, Bury, M14 6DW

The carer is now assigned to the child.


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
- ➔ Within the child profile select **Go to details**

Child details

Gordon Ferguson (16 week(s) old)
NHS 111 999 9999
[Go to details](#)

- ➔ Select **Update** in the Assigned Carer section

 Assigned Carer: Abbey Parkinson [Update](#)

- ➔ 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

Given names	Surname	NHS number	Phone	Address
Abbey	Parkinson	1239999123	07865432456	43, Ascot Way, Bury, B7 8GH

[Cancel](#) [Confirm](#) [Unassign](#)

Assign a Health Visitor to a child

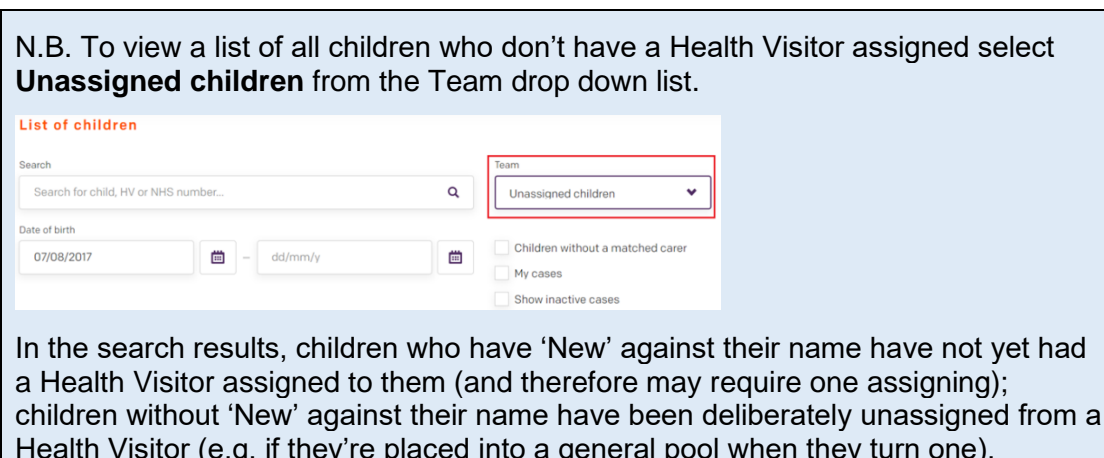
- If the child doesn't yet have a Health Visitor assigned at all then you can assign a Health Visitor from within the search results in the Children menu or from within the child profile.

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

Assign a Health Visitor to a child from the search results

- ➔ From the Children menu search for the child you wish to assign a Health Visitor to.

N.B. To view a list of all children who don't have a Health Visitor assigned select **Unassigned children** from the Team drop down list.



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).

- ➔ To assign a Health Visitor to a child, select **Assign** in the Health Visitor column

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
Micky Parker	8877666655	01/01/2020	No		Assign	Assign

- ➔ In the Assign Health Visitor pop up window search for the Health Visitor you wish to assign, select their name so the line is highlighted and select **Confirm**.

Health Visitors can also select **Assign to me** which is a quick way of assigning themselves as the Health Visitor to a child.

The Health Visitor is now assigned to the child.

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
- ➔ Within the child profile select **Go to details**

Child details

Peter Parker (8 week(s) old)
NHS 1299999111
[Go to details](#)

- ➔ Select **Update** in the Health Visitor section

Health visitor [Update](#)

Assigned Health Visitor: Mary Hughes

- ➔ 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).

Assign Health Visitor

Search

Search for Health Visitor by name or surname...

Given names	Surname	Team	Email
Amy	Tyler	Prestwich	training-healthvisitor9@gmtogether.org

Adding case notes to a child profile

- Heath Visitors, Health Visitor Managers and Administrators have the ability to add case notes to a child profile, with any pertinent information of their choosing.
 - 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
- ➔ In the Notes section (located at the bottom of the child's profile page) select **General** from the **Category** drop down list, type your note in the main notes field and select **Add note**

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.

Child details

NOTES AVAILABLE

Close a case

- 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 dies. Once a case is closed, no assessment forms will be generated and no notifications will be sent.

Children who move out of your locality to an area who do not use Early Years

- ➔ From the Children menu search for the child and open their profile
- ➔ On the top right of the child's profile page select **Close case**



- ➔ From the **Reasoning** drop down list select **Moved out of GM**, enter any further details in the Description box and select **Close case**

Close case

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.

Reasoning

Description

The child's record will now be marked as inactive.

N.B. On the main child profile you may want to select **Export All** to receive an email containing all the child profile information. You can then forward this on to the new locality by email.

Children who move to another locality who do use Early Years

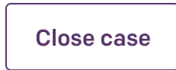
- You don't need to close the case if the child moves to an area who is also using Early Years. Instead, raise a request with your local IT Service Desk and ask them to change the child's locality. They will forward the request to systems administrators who have permissions to make this change in the system. The details you'll need to provide to your local IT Service Desk are:

Request to change child's locality	
Child name	
Child NHS number	
Child date of birth	
New locality name	

- When the IT Service Desk confirm to you that they've made this change, inform the new locality. They will then be able to search for the child profile and assign the child to a new team and Health Visitor.

Closing a case for a deceased child

- ➔ On the top right of the child's profile page select **Close case**



- ➔ Select **Deceased** from the **Reasoning** drop down list, enter any further details in the **Description** box and select **Close case**

Close case

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.

Reasoning

Deceased

Description

Cancel Close case

It will now state at the top of the child profile that the case is closed and the reason why

Case closed

Reasoning: Deceased

Description: Child passed away 03/03/2020

Reopen a case

- ➔ If you wish to reopen the case, search for the child in the Children menu and select the **Show inactive cases** checkbox

Search Bobby Harris

Team All

Date of birth 05/01/2018

Children without a matched carer

Show inactive cases

Show only new

- ➔ Open the child's profile and at the top right of the page select **Reopen case**

Child details

Reopen case

i Case closed

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

Reopen case

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

Yes

No

Uploading documents to a child's profile

- You can upload scanned documents to a child's profile and you also have the option of sharing the documents with the Carer.
- N.B. Ensure that any information you share with carers is in line with your local practices and that you're not sharing any confidential or sensitive data.

- ➔ Within the child's profile select the **Documents** tab

Outcome Assessments configuration **Documents**

- ➔ Select **Add**

Attachments list					Add
Name	Created	Created by	Shared with Carer	Download	

- ➔ Select **Browse** to search for the document on your local files and click on Open
- ➔ In the **Name** field enter a title for the document
- ➔ If you wish to share the document with the Carer select the **Share with Carer** checkbox and click on **Save**

Share result

i Should Carer have access to this attachment?

Share with Carer

Save **Cancel**

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	Download

- ➔ To delete a document from a child's profile select the document title and in the Attachment Details pop up window select **Delete**

Save **Cancel** **Delete**

You can also unselect the Share with Carer checkbox if you wish to remove the Carer's access to that document.

Confirm Carer contact details to enable them to access Early Years

- Once a Carer profile has been created and the Carer has been assigned to a child, a member of your health visiting team needs to contact the Carer 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.
 - PLEASE READ THE SEPARATE HELP GUIDE '**CONFIRM CARER CONTACT DETAILS**' – this help guide outlines the steps required for this process.
-