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:
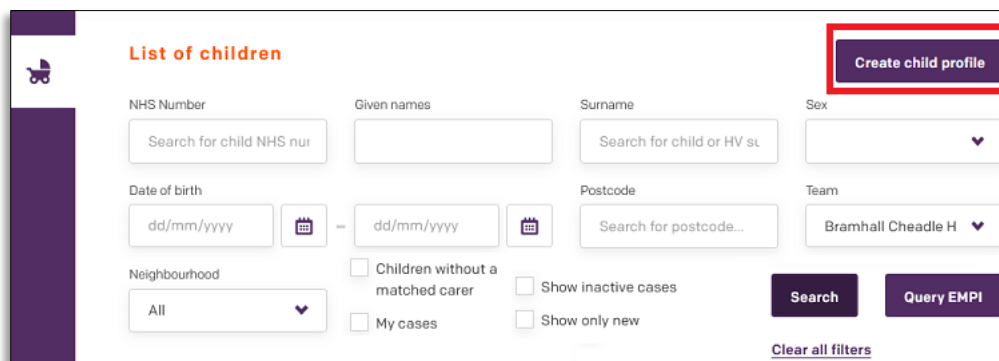
Create a Child Profile

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.

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

Step 1: (Child Details) 'Enter' the **'NHS number'**. Select the **'Parental consent'. The 'Parental Consent'** section records whether the parent/carer 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.
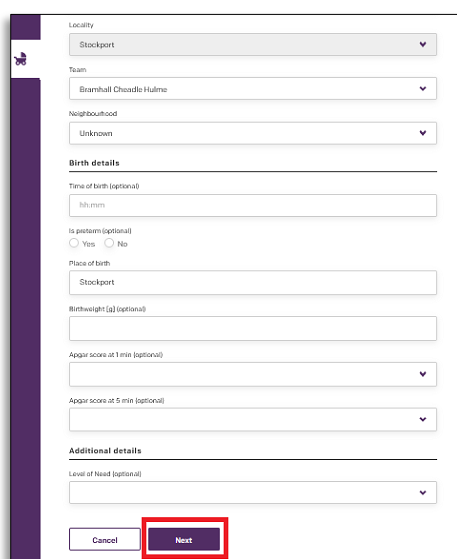
Note: N.B: If the **Ethnicity** is unknown or the subject hasn't been asked select **Unknown** from the drop down list. Select **Not Stated** if the person has been given the opportunity to state their ethnicity but has chosen not to.

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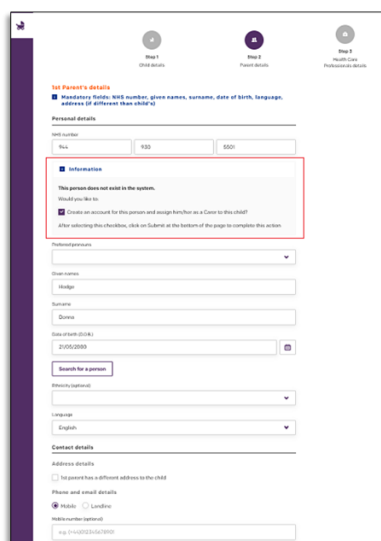
The child's **Team** defaults to the Team of the staff member creating the profile so you will need to change it if the child sits within a different team.

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.

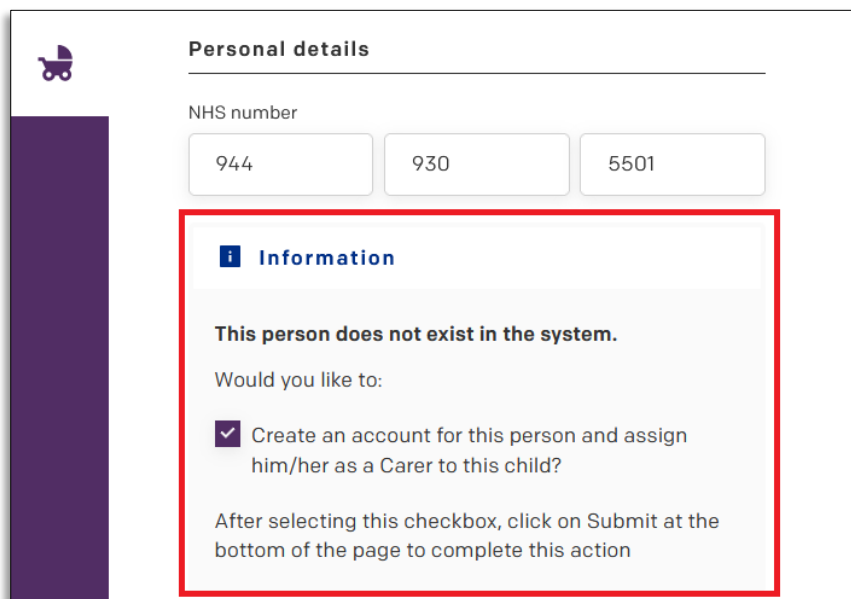Once you have entered the information and **'selected'** the **'level of need' 'click' 'Next'**

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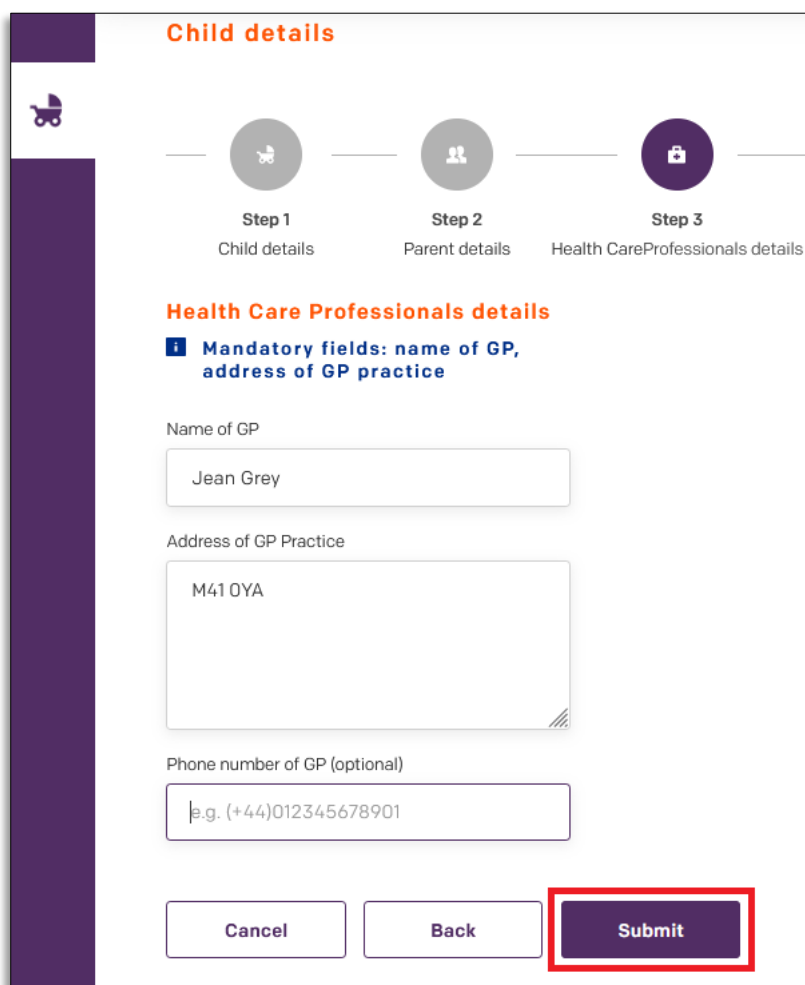
The prompt will ask if you wish to **'create an account for the mother'** and **'assign her'** as the **'carer'** to the child. **'Select'** the **'checkbox'** if you wish to do this. If there is a different Carer to the child, leave this checkbox blank and you can assign a different Carer later.


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'.**

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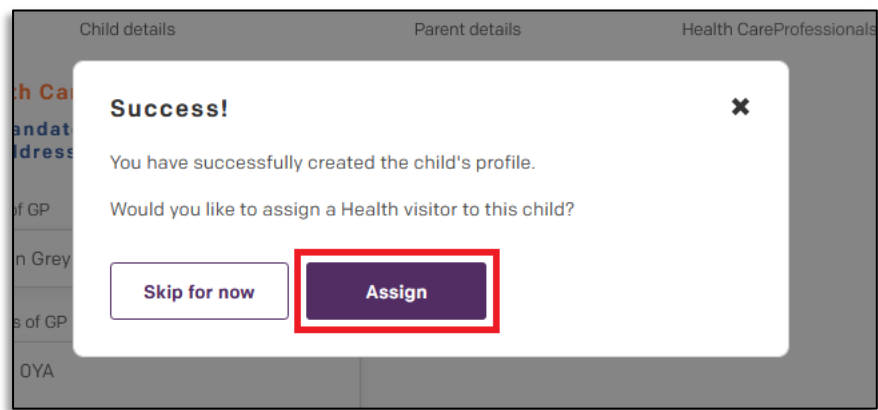
Note: Select **'Skip for now'** if you want to assign a Carer and Health Visitor later on.

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.

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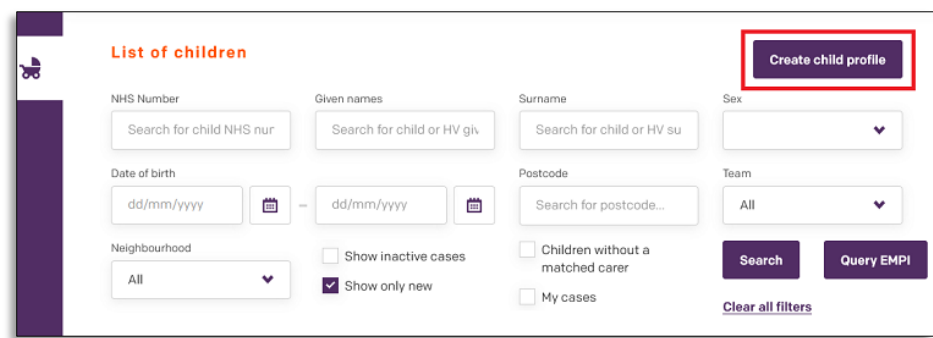
A prompt will populate confirming you've successfully assigned the Health Visitor and the child profile has been created. **'Click' 'okay'.**


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.
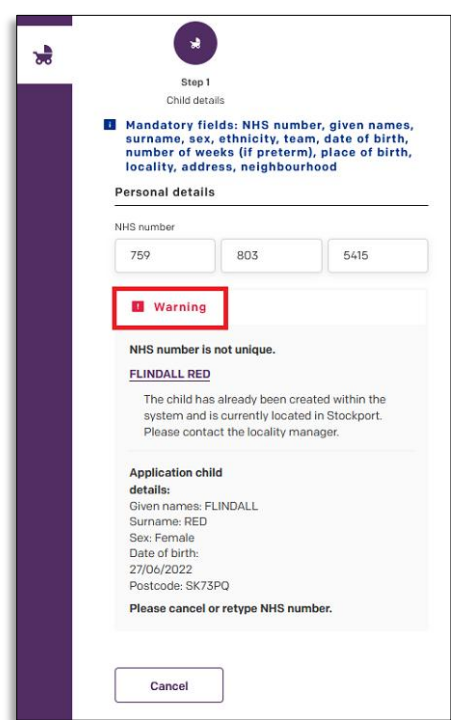
Search for Children

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 though 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'.**

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

'Tick' a Search Criteria in this case **'Show inactive cases'** and **'Children without a matched carer'**. **'Click' 'Search'** to view the profile.
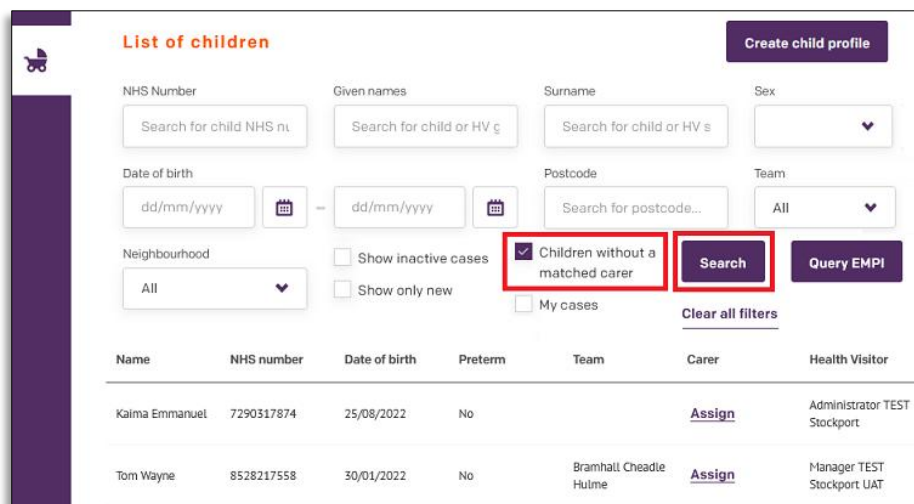
Note: By selecting **'Show inactive cases'**, the search results will include child profiles which have been closed (e.g. if the child has left the area or is deceased).

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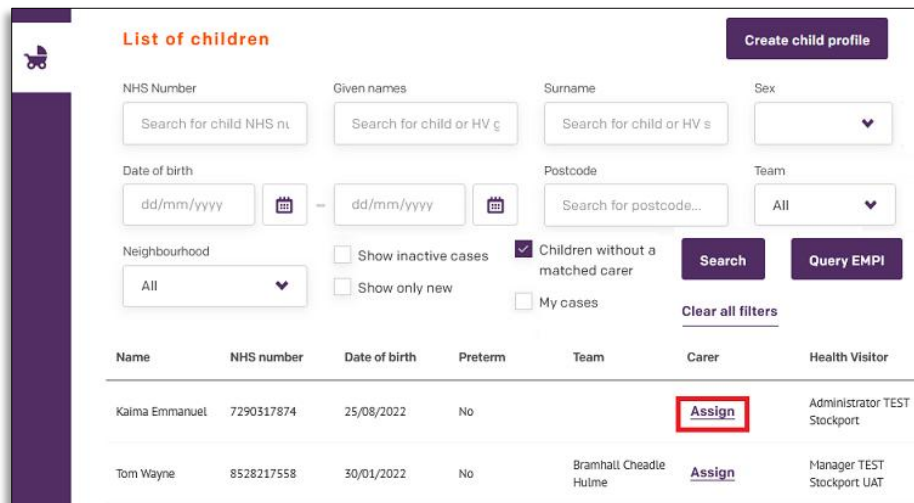
Note: If you wish to assign a different Carer to a child or temporarily unassign a Carer from a child (e.g. if the child is in the process of being taken into foster care), then this can only be done within the child's profile in the **'Go to details'** page.

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

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.

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.

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.

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'**.

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

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'**.
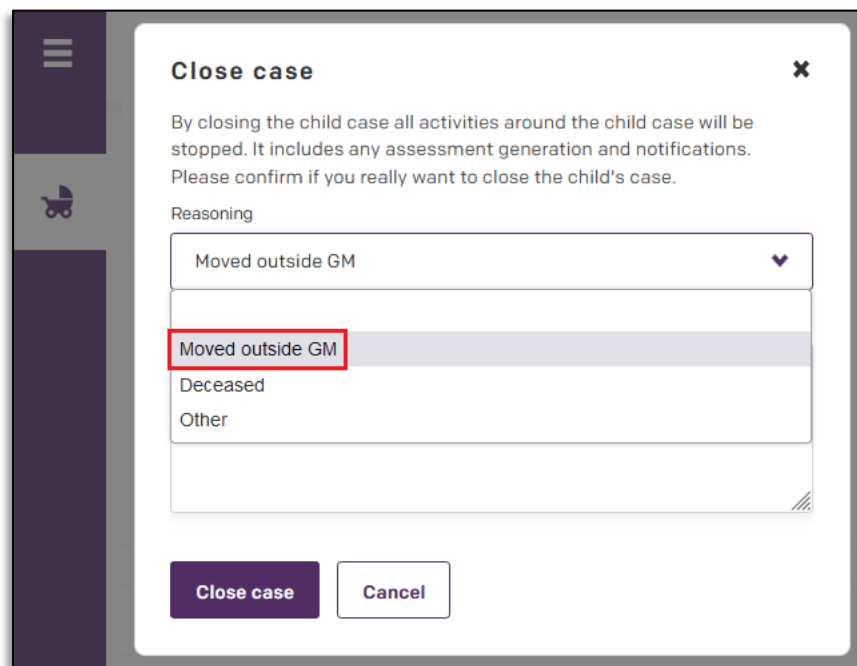

If a child assessment is open a prompt will ask if you want to proceed. Click Cancel to go back to the child details page or **'click' 'Proceed'** to close the case.

'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'**.
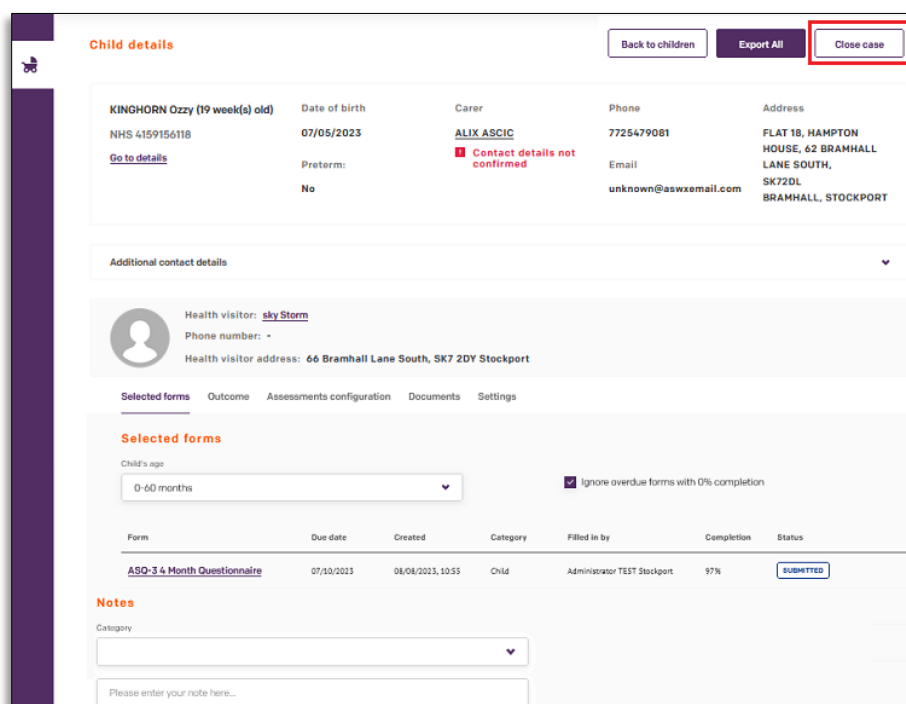

Note: If you click **'Moved outside GM'** you will not be able to reopen the case or show inactive cases. You will need to contact the **'gmdp.support@nhs.net'** with the child's information if a mistake was made.

Close Case:

Scenario 2

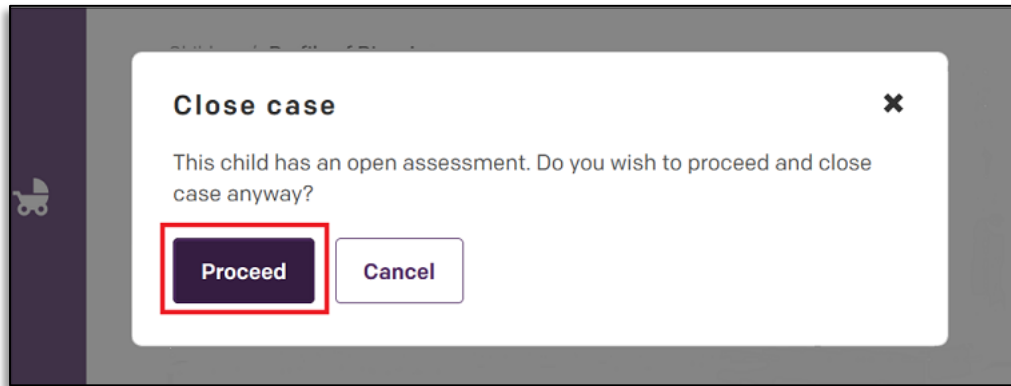**Closing a case for a deceased child or other.**

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

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.

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

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

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

Reopen a Case

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

> **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.

> **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'**.

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

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

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.

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.

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.

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/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)

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/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.

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'** memu.

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'**.

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

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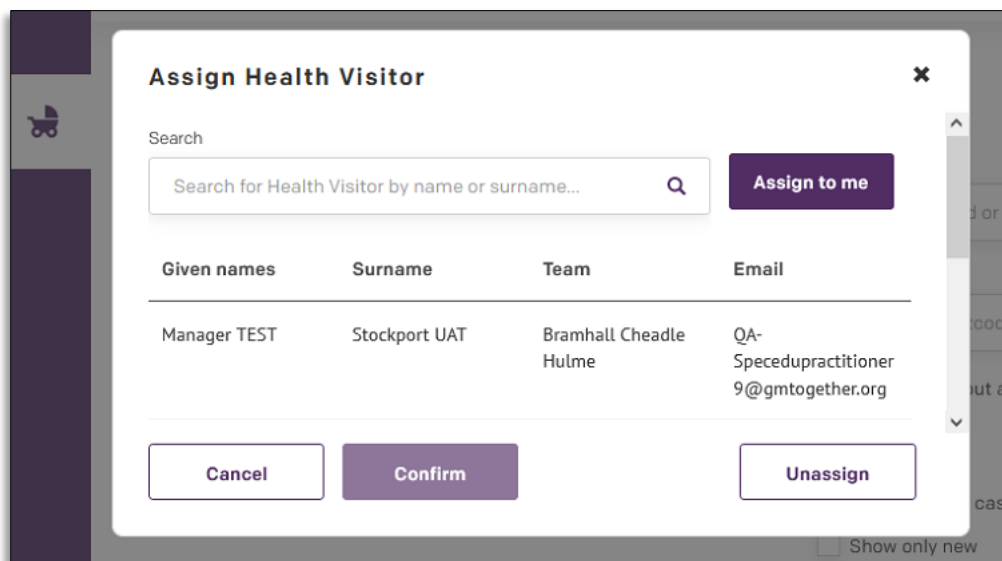
In the Assign Health Visitor pop up window search for the **'Health Visitor'** you wish to assign, select their name in the search results so the record is highlighted and select **'Confirm'**.

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).
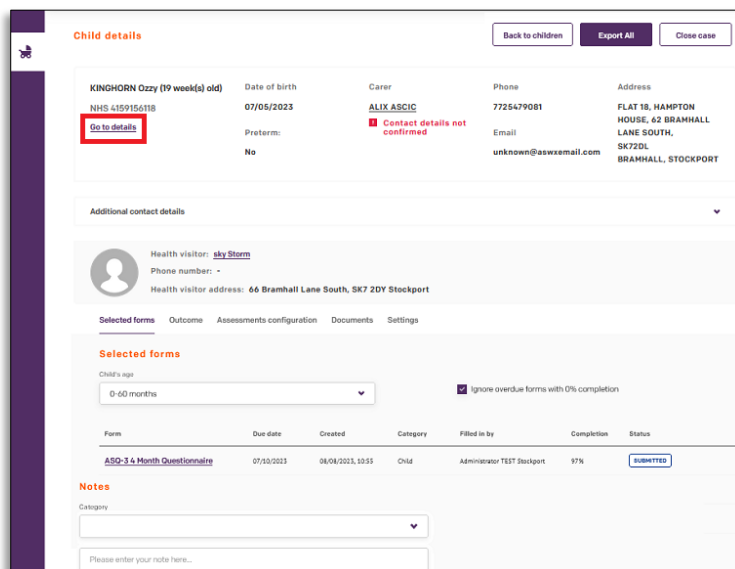
Confirm Carer contact details to enable them to access Early Years

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'**.

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.

'Click' the **'Carer's name'** (Lucy Ricardo) to open their profile.

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'**.

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.

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'**.

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

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.

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.

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.
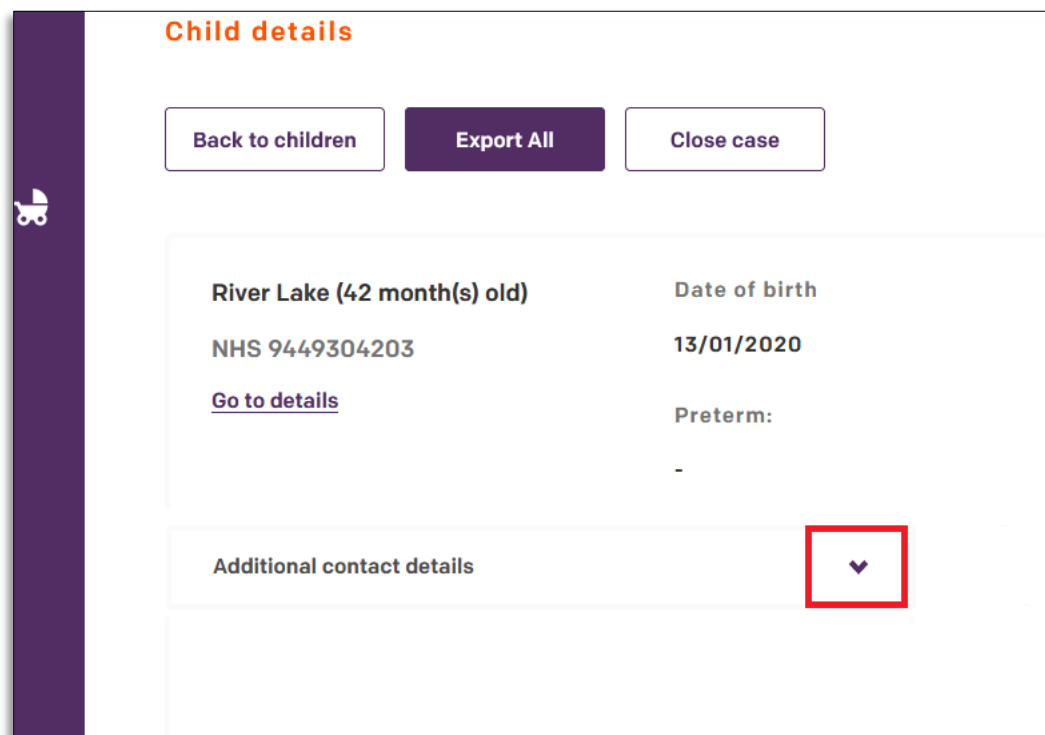
Additional Contact Details

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.
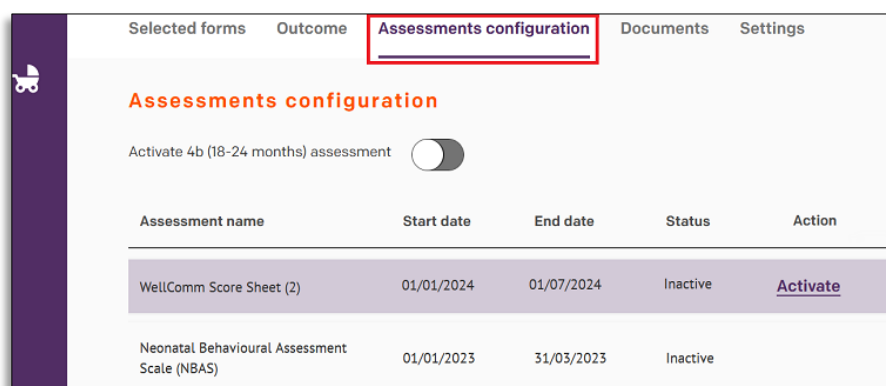
Selected Forms

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

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.

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'**.

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

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.

'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.

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'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.

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'**.

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.

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.

'Click' 'Browse' to choose the file from your documents and **'click' 'Save'**. In the Name field enter a title for the document.
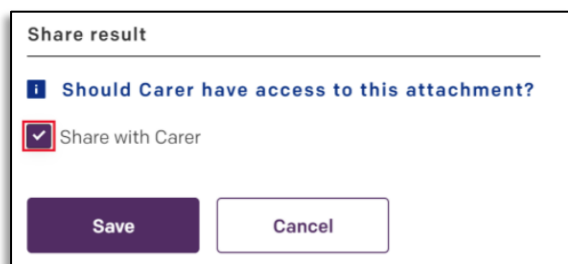
If you wish to share the document with the Carer select the Share with Carer checkbox and click on Save. You can also **'unselect'** the **'Share with Carer'** checkbox if you wish to remove the Carer's access to that document.

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.

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.

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

Assessment Forms: https://youtu.be/yr6S_u0UFeU?si=LnPRKOD33Lwgmn_c

Adding Documents and Case Notes: https://youtu.be/Q2vSXPwKKU0?si=uvpJbDPviYHpFg0P

Editing and Exporting Child Profile Data: https://youtu.be/4lMAZbWVVU4?si=nTvY7SNsCfr--qIB

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