



# Early Years Application

## Health Visitor Manager

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

### Help Guide Quick links:

[Dashboard Menu](#)

[Children Menu](#)

[Guidance Menu](#)

[Teams Menu](#)

[Users Menu](#)

[Create Users Menu](#)

[Reports Summary Menu](#)

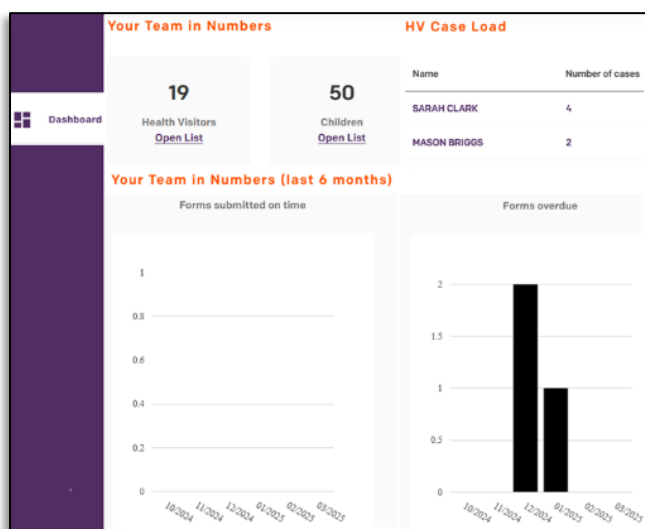
[Carers Login Progress](#)

[Notifications Menu](#)

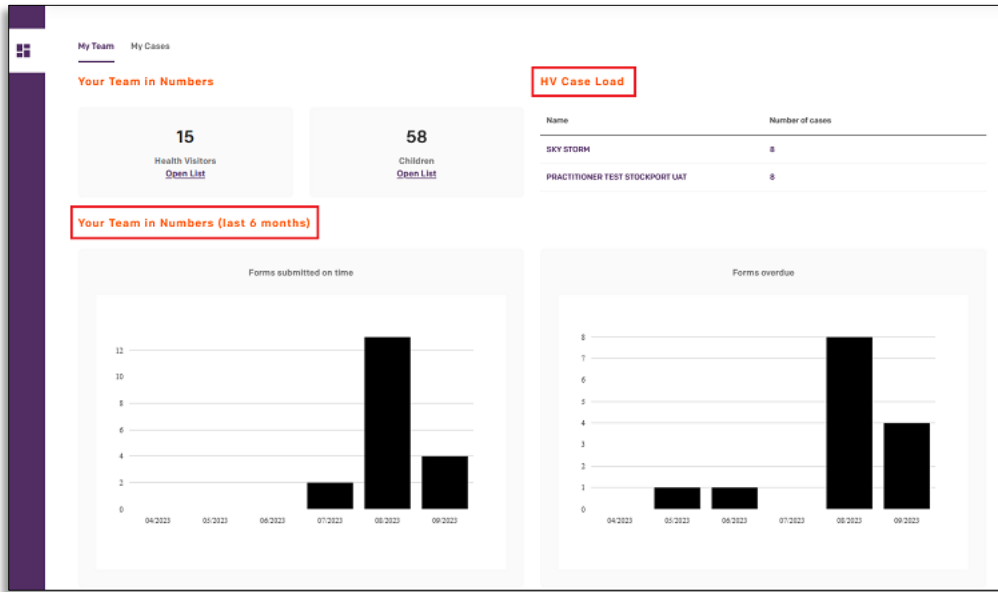
[Assigning a child to your caseload](#)

### Dashboard Menu

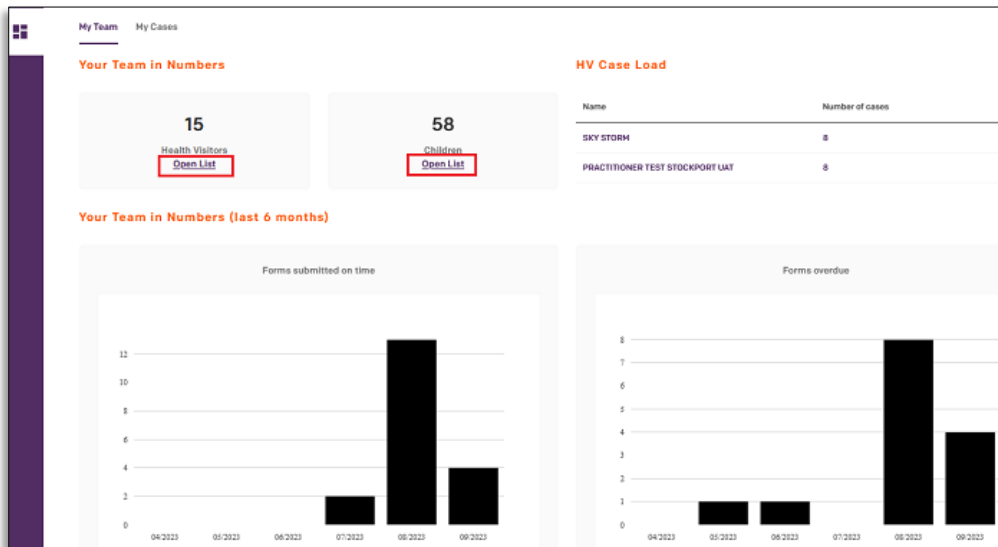
The **'Dashboard'** helps you to manage your team by displaying key summary information about your team members and their cases.



The Manager Dashboard view (My Team) will also display your Health Visitor's name, and the number of cases assigned to the HV. The **'Your Teams in numbers'** graph will **'show forms submitted'** on time and **'Overdue Forms'** for the last 6 Months.

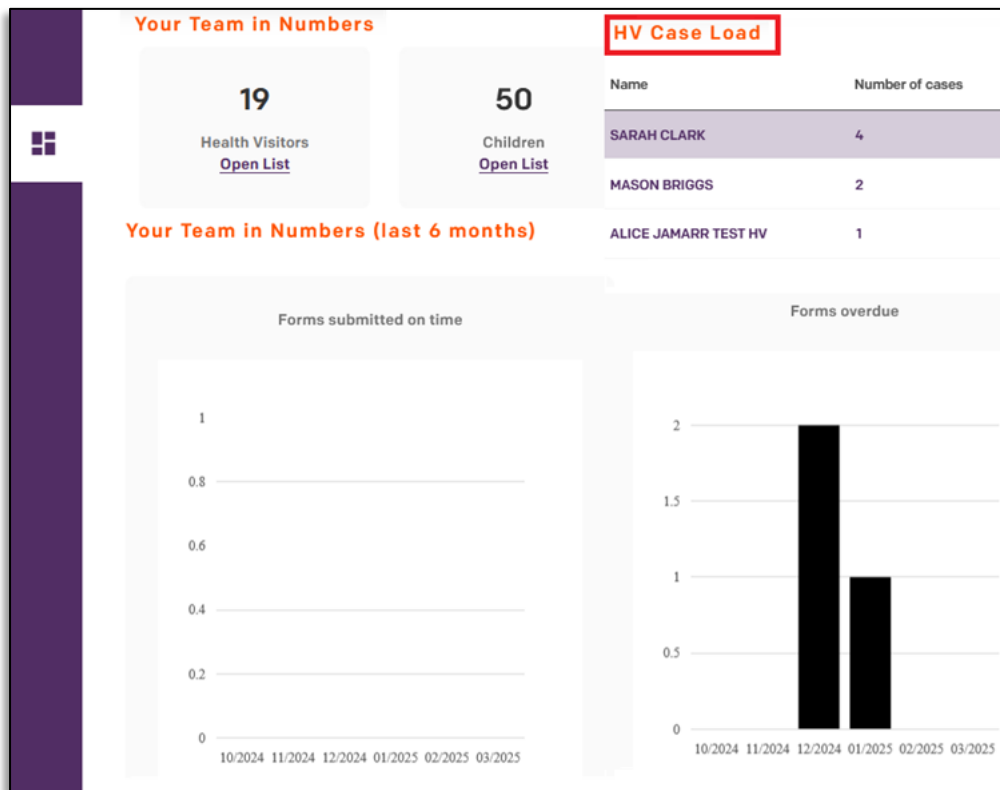


**'Click'** the Health Visitor **'Open List'** hyperlink to view a list of HV's. You can also **'click'** the children **'Open List'** hyperlink to view a list of children.

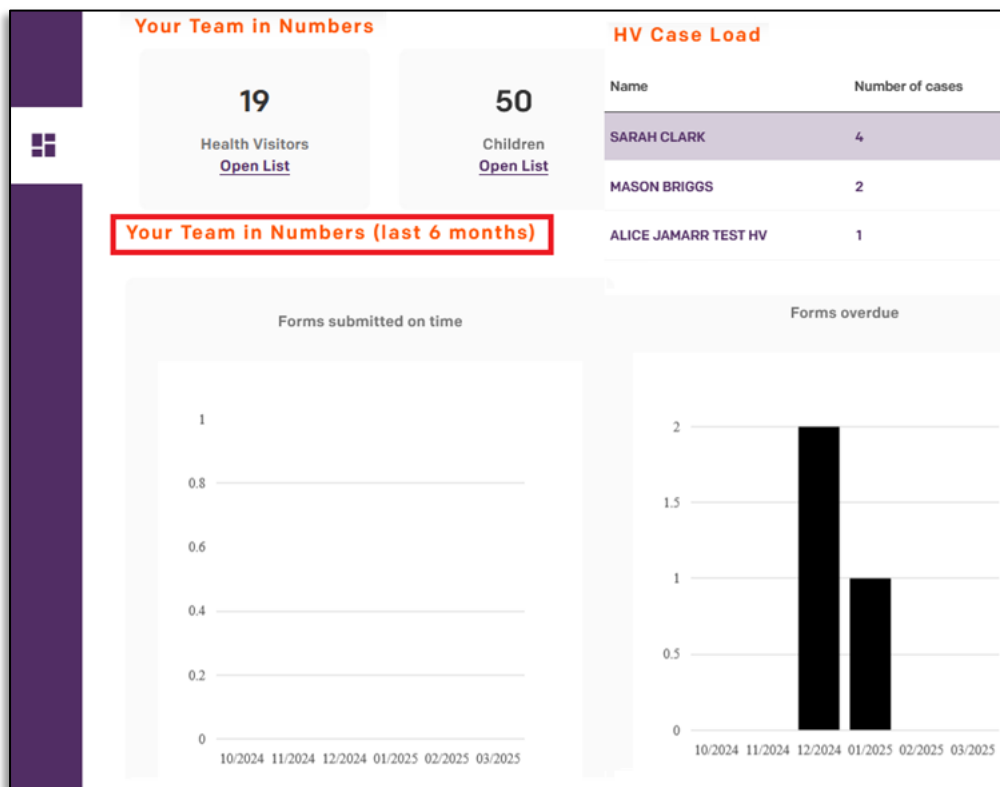


**Note:** The number of children assigned to you as stated on the Dashboard may be higher than the number which appear when you open the list. This is because there is a filter on the full list which only displays children under 2 ½ years old. To show older children in the full list you can amend the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

The HV Case Load displays the number of children assigned to each Health Visitor in your team. **'Select'** a **'Health Visitor'** to view a list of children assigned to them.



**'Your Team in Numbers (last 6 months)'** displays a summary of the number of assessment forms over the last 6 months which were submitted on time by Carers, or which were overdue (not completed by Carers within the stipulated time period).



## Children Menu

See the separate help guides on **'Managing Child Profiles'** and **'Working with Forms'**, which cover content in the **'Children'** menu.

**List of children** Create child profile

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

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

Search Query EMPI  
[Clear all filters](#)

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

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

**Searching For Children:** [https://youtu.be/PHZ\\_YbdgKY4?si=7KnfNFTtT1dXGSs](https://youtu.be/PHZ_YbdgKY4?si=7KnfNFTtT1dXGSs)

**Assessment Forms:** [https://youtu.be/yr6S\\_u0UFeU?si=LnPRKOD33Lwqmn\\_c](https://youtu.be/yr6S_u0UFeU?si=LnPRKOD33Lwqmn_c)

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

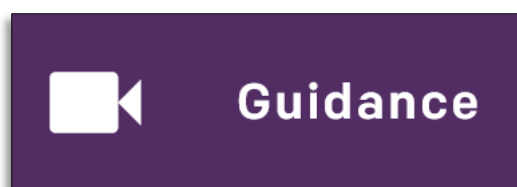
**Editing and Exporting Child Profile Data:** <https://youtu.be/4IMAZbWVVU4?si=nTvY7SNsCfr--qIB>

**Closing A Case:** [https://youtu.be/sQd\\_RWBQevk?si=DavkcKnOjQrvxamr](https://youtu.be/sQd_RWBQevk?si=DavkcKnOjQrvxamr)

## Guidance Menu

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

**Guidance Menu:** [https://youtu.be/D7216-ESI6U?si=nZGInIOWSsYR\\_ppL](https://youtu.be/D7216-ESI6U?si=nZGInIOWSsYR_ppL)



# Teams

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

List of teams					
Name	Manager	Locality	Members		
Training	Amber Morgan TM Training	Training	19	<a href="#">Details</a>	
Training Case	Harry Bains	Training	2	<a href="#">Details</a>	
Training Kids Planet	Alicia TM 1	Training	2	<a href="#">Details</a>	
Training Miki Mouse		Training	0	<a href="#">Details</a>	

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

From the 'Teams menu' select 'Details' next to the team you want to view more information for.

List of teams					
Name	Manager	Locality	Members		
Training	Amber Morgan TM Training	Training	19	<a href="#">Details</a>	
Training Case	Harry Bains	Training	2	<a href="#">Details</a>	
Training Kids Planet	Alicia TM 1	Training	2	<a href="#">Details</a>	
Training Miki Mouse		Training	0	<a href="#">Details</a>	

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

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

Team members						
Name	Phone number	Email	Working from	Working to	Children	
Practitioner test Stockport UAT		qa-speedupractice r10@gmtogether.org			0	<a href="#">Display children</a> <a href="#">Remove member</a>

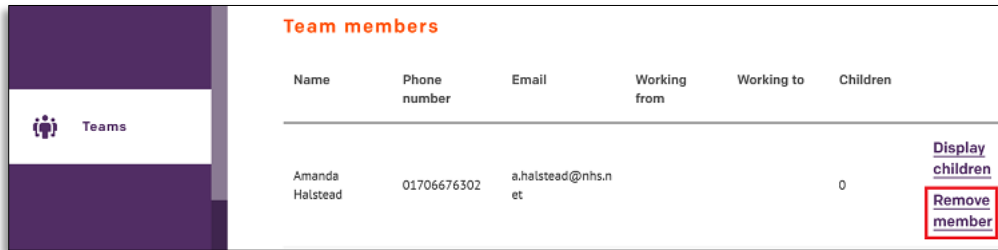
‘Click’ ‘Display children’ to view a list of children assigned to a Health Visitor’s within the team.



Name	Phone number	Email	Working from	Working to	Children
Amanda Halstead	01706676302	a.halstead@nhs.net			0

Display children  
Remove member

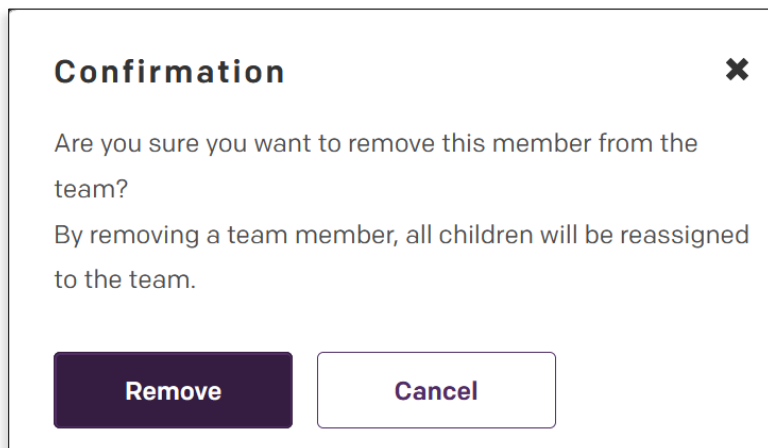
‘Click’ ‘Remove Member’ to remove a Health Visitor from a team.



Name	Phone number	Email	Working from	Working to	Children
Amanda Halstead	01706676302	a.halstead@nhs.net			0

Display children  
Remove member

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



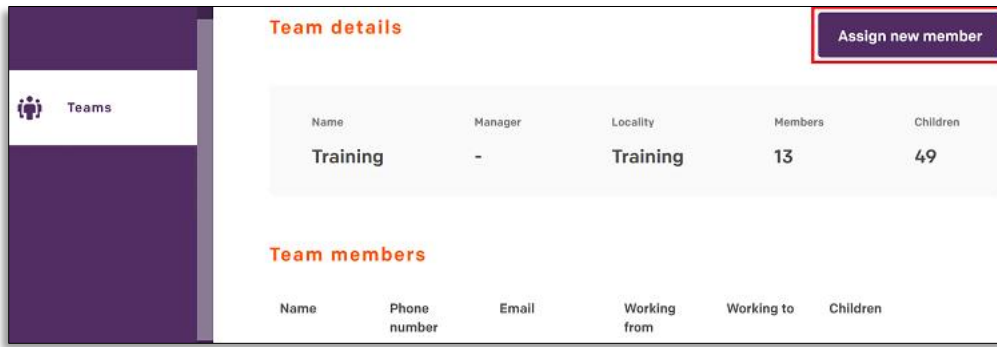
**Confirmation** ✕

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

**Remove** **Cancel**

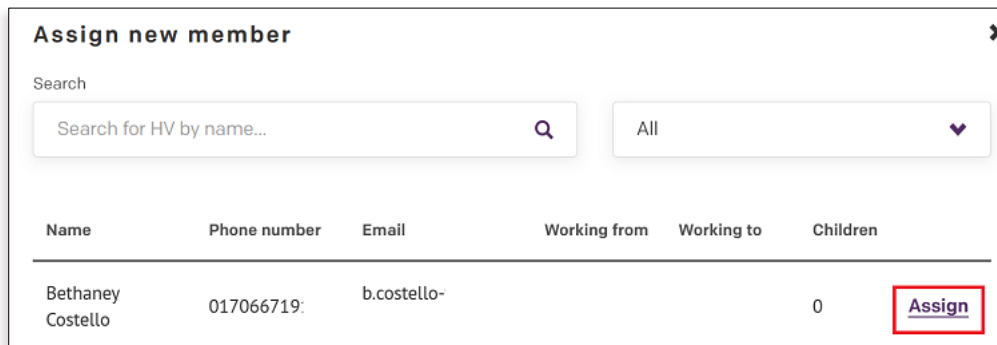
**Note:** The Health Visitor’s profile remains in the application, but they will no longer be assigned to that team and any children who were in their caseload will now be re-assigned to the locality.

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



**Note:** Before you can assign a Health Visitor to a team they will first need to be setup as a user. Go to the 'Create User' menu to create their profile if one does not exist.

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



### Create a new team:

If you need to create a new team or edit team details (e.g. the team name), raise a request with your local IT Service Desk 'gmdp.support@nhs.net'. They will forward the request to the system administrators who can carry out this task.

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

Request for creation of new team	
Team name	
Locality	
Manager name	
Office address of team	
Team email address (put n/a if not applicable)	
Office phone number for team	

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

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

## Users

You can edit profiles for Carers and Health Visitors. You can also add new Carers and Health Visitors to Early Years (functionality which is also available from the Create User tab).

The screenshot shows the 'List of users' page. At the top right is a 'Create user' button. Below it are three filters: a search bar with the placeholder 'Search for user by name, surname, NHS nur', a 'Role' dropdown menu set to 'All', and an 'Active' dropdown menu set to 'All'. Below the filters is a table with the following columns: Full name, Login, Role, Last login, Team/List, Active, and Actions. The table contains one row for James Jonha with login 9449306559 and role CarerP5. The 'Team/List' column for James Jonha contains the text 'Assigned Children' with a link icon. The 'Active' column contains 'Yes'.

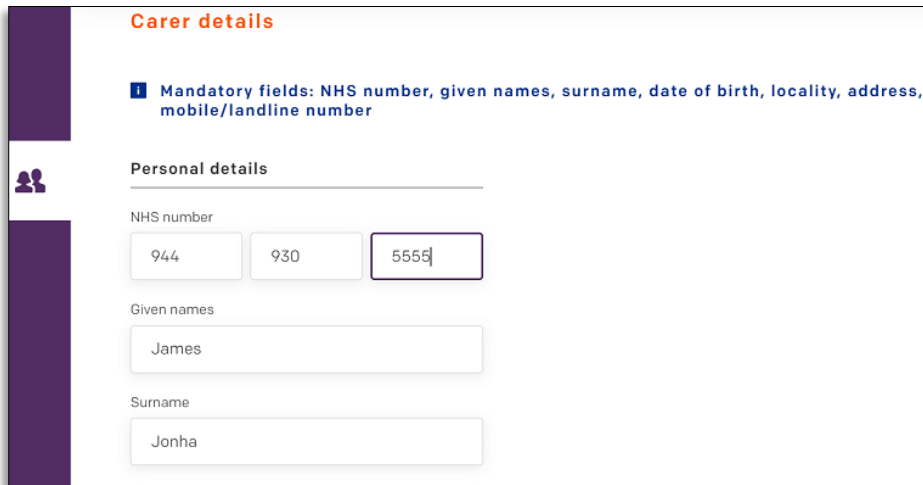
You can scroll through the list of users or type a name and the search results will automatically display any matching users. 'Click' 'Role' or 'Active' from the drop-down list to filter the search.

This screenshot shows the 'List of users' page with the search bar containing the text 'James'. The 'Role' dropdown menu is open, showing options: All, Practitioner, CarerP5, and CarerP9. The 'Active' dropdown menu is also open, showing options: All, Active only, and Inactive only. The table below still shows the user James Jonha.

'Click' the profile from the search result.

This screenshot shows the 'List of users' page with the search bar containing 'James'. The user profile for James Jonha is highlighted with a grey background, indicating it is the selected profile.

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



**Carer details**

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

**Personal details**

NHS number

944 930 5555

Given names

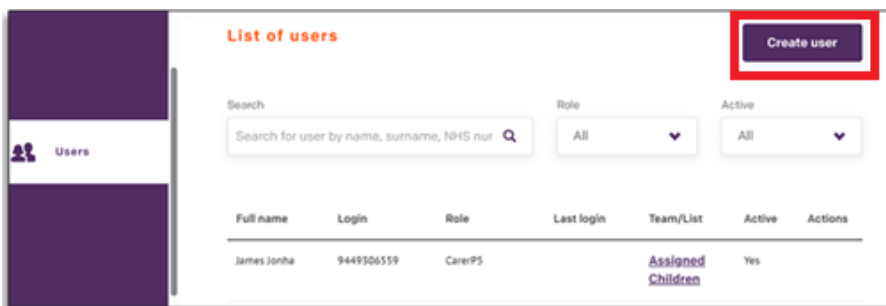
James

Surname

Jonha

## Add new carers and Health Visitors to the system

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



**List of users**

**Create user**

Search: Search for user by name, surname, NHS nur

Role: All

Active: All

Full name	Login	Role	Last login	Team/List	Active	Actions
James Jonha	9449306559	CarerPS		<a href="#">Assigned Children</a>	Yes	

## Create User

To create a **'Practitioner'** user, you will need to raise a request with **'gmdp.support@nhs.net'**. The only profile staff members are required to create is the Carer profile.



**Create user**

Choose user's role which you would like to create

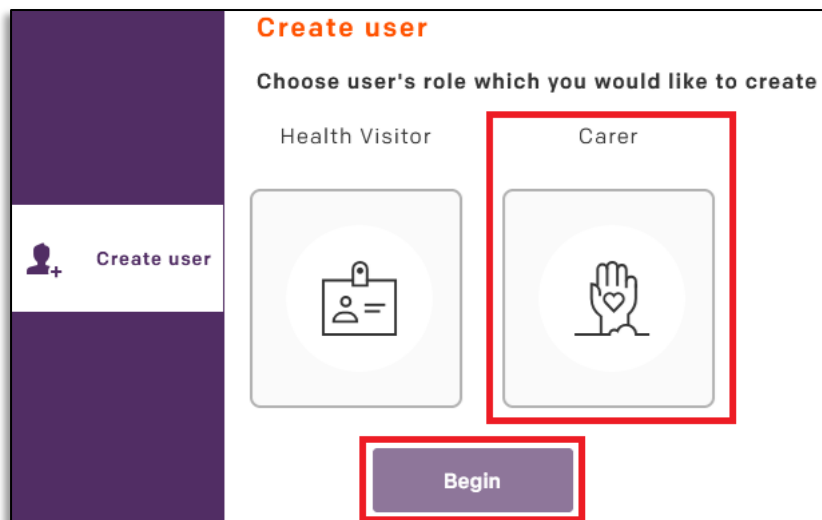
Health Visitor

Carer

**Begin**

**Note:** If you need new **'Managers'** or **'Administrator'** setup you will need to raise a request with **'gmdp.support@nhs.net'**.

'Click' the 'Carer' tile so that it becomes highlighted in purple and 'click' 'Begin'.



### Create a new Health Visitor Manager profile

If a new Health Visitor Manager joins your team, raise a request with your local IT Service Desk to get them set up as a user in Early Years. They'll forward the request to the systems administrators who have permission to set up the new user in the system. The details for the Health Visitor Manager that you'll need to provide to your local IT Service Desk are:

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

### Create a new Health Visitor profile

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

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

## Create a new Administrator profile

If a new Administrator joins your team, raise a request with your local IT Service Desk to get them set up as a user in Early Years. They'll forward the request to the systems administrators who have permission to set up the new user in the system. The details for the Administrator that you'll need to provide to your local IT Service Desk are:

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

## Report Menu

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

The screenshot shows the 'Report summary' interface. At the top right is an 'Export' button. Below it are search filters for 'Search' (with a search box), 'Team' (dropdown), 'Status' (dropdown), and 'Level of Need' (dropdown). There are also date pickers for 'Date of birth' and 'Date of completed assessment'. Below the filters are checkboxes for 'Show children meeting or exceeding expected level of development', 'Show children not meeting expected level of development', and 'Show only unsubmitted forms'. A 'Clear all filters' link is also present. The main part of the interface is a table with the following columns: Name, NHS number, Date of birth, Team, Carer, Health Visitor, Form type, Form completion, Status, Show details, and Level of Need.

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

'Click' 'Show details' on the profile with the 'Finished' report.

This screenshot is identical to the previous one, but the row for Lucy Ricardo is highlighted in a light purple color. In this row, the 'Form completion' column shows '100%' and the 'Status' column shows 'Finished'. Both the '100%' and the 'Finished' text are enclosed in red boxes. The 'Show details' link for this row is also highlighted with a red box.

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

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

ASQ:SE2 Lucy Ricardo (17 month(s) old) Deadline date 04/08/2023, 01:00 Submitted date 31/07/2023, 13:12 Finish review date 31/07/2023, 13:13 Health visitor sky Storm  
NHS 9449305900

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

**Form summary**

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

**Score**

**60.00**  
Total scoring

## Carers Login Progress Menu

See the separate Carers Login Progress Menu.

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

Report Export

Carers login progress

Search: Search for carer by full name, email or NHS  Role: All  Logged in: All  Contact Details Confirmed: All  Active: All

Child Date of birth: dd/mm/yyyy - dd/mm/yyyy Team: All  [Clear all filters](#)

Full name	NHS number	Email	Role	Team	Last Login	Contact Details Confirmed	Active	Actions
Billy Parkins	9449306052		CarerPS	Training		No	No	<a href="#">Resend Invitation</a>
Carer and parent Lewis test	9990228434	testLewis@objectivity.co.uk	CarerPS	Training		No	No	<a href="#">Resend Invitation</a>

## Notifications Menu

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

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

Early Years How to use the Notifications menu: <https://youtu.be/swY2OJVdWlw?si=wG-ZEPhnnqN5cWZJ>

Notifications

Search: Search for child or carer, NI  Record type:  Action type:

Record type	Full name	NHS number	Date of birth	Locality	Source	Action type	Updated date	Created date	
Child	BABY SCHILLER	903904222	28/08/2024	Training	NEMSpdr-birth-notification-1	NEW	24/09/2024, 16:53		<a href="#">Details</a>
Person	ISABELLA MARTIN	936954292	02/02/2000	Training	NEMSpdr-change-of-address-1	UPDATE	24/09/2024, 15:40		<a href="#">Details</a>
Carer	RON COOKIE	9268112477	01/01/2000	Training	NEMSpdr-change-of-address-1	UPDATE	24/09/2024, 15:28		<a href="#">Details</a>

## Assigning children to your caseload

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

### Assigning a child to your caseload

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

**List of children** Create child profile

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

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

Search Query EMPI Clear all filters

Name	NHS number	Date of birth	Preterm	Team	Carer	Health Visitor
child well comm test	9605587378	01/01/2023	No	Training	<span>Assign</span>	Amber Morgan TM Training

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

**Assign Health Visitor**

Search: Search for Health Visitor by name or surname... Q Assign to me

Given names	Surname	Team	Email
CHABAH	ABRAVANEL	Epsom	Testingmca17@outlook.com
CLEM	COTERRILL	Epsom	clem@greatermanchestercombined.com

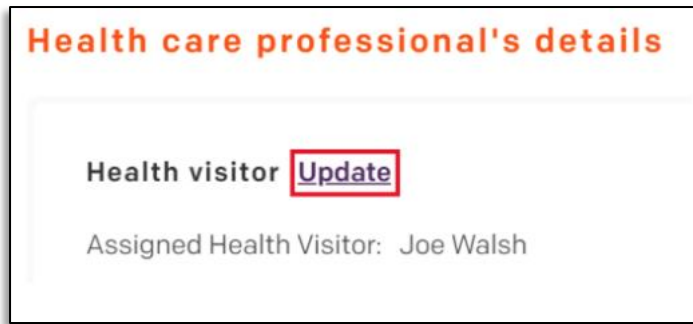
Cancel Confirm

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

**Child details** Back to children

TARAH BORIANIFISHER (3 week(s) old) Date of birth  
01/12/2020  
NHS 9449305250  
Go to details Preterm:  
No

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



**Note:** Within the pop-up window select Assign to me.

### Viewing details of children in your caseload

On your Dashboard select the My Cases tab.



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

