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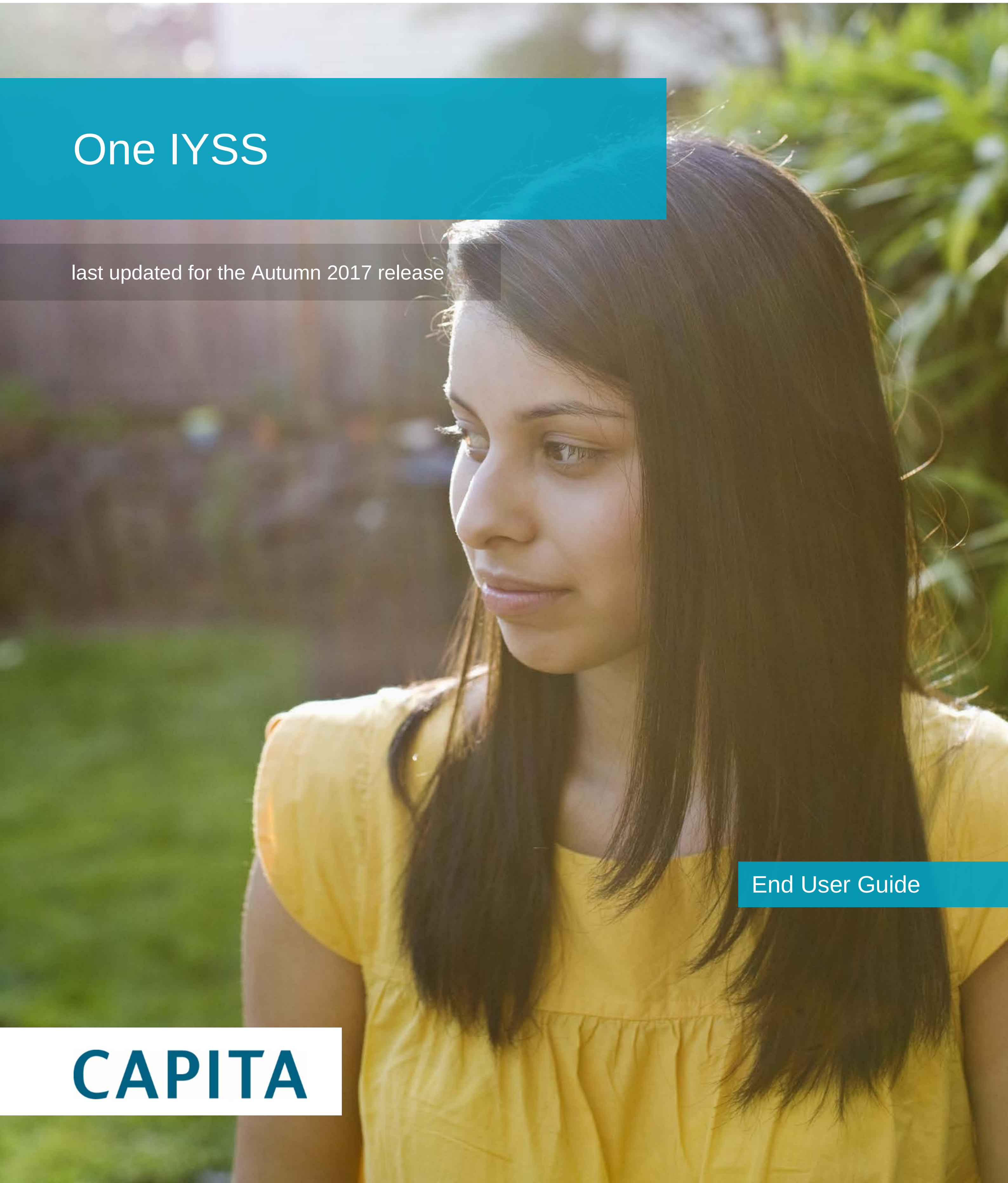
One IYSS

last updated for the Autumn 2017 release



End User Guide

CAPITA

Revision History

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www.capita-one.co.uk

Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on My Account.

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

onepublications@capita.co.uk

Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

Contents

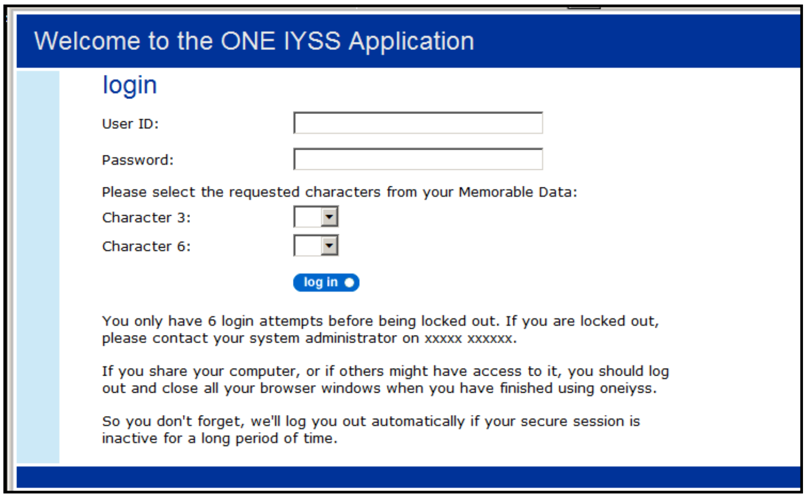
01 | Before you start basics

This chapter covers the basics of using OneIYSS.

Logging In

1. To display the OneIYSS welcome screen, either:
   - Open an **Internet Explorer** window and enter the IYSS URL in the address bar

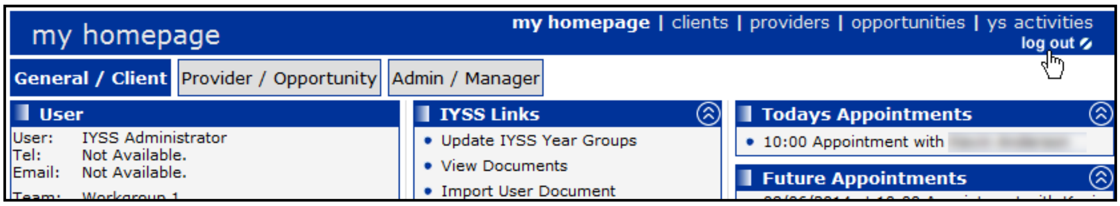
     or
   - Double-click the **OneIYSS** shortcut on your Windows Desktop.
2. In the OneIYSS **login** screen, enter your **User ID**, **Password** and the two requested characters from your memorable data.



3. Click the **log in** button to display the **my homepage** dialog.

Logging Out

If you are logged into OneIYSS and you do not intend to use IYSS for a while, you should log out. Click the **logout** button in the top right-hand corner of every page.



System time out

If you have <u>not</u> been active in OneIYSS for a while you will be logged out. The length of time before automatic log out is set by your system administrator.

A warning message is displayed at the top of your screen alerting you that “Due to a period of inactivity, you will be logged out in …..” and a countdown from three minutes starts. During this three minutes count down, if you click on a button or enter data, the countdown disappears and the period of inactivity is reset.

If you were in a client record when you are logged out, the login page is displayed. When you have logged in again, OneIYSS returns to the page on which you were working.

Navigating in OneIYSS

This section includes tips for navigating around OneIYSS.

Clicking links and buttons

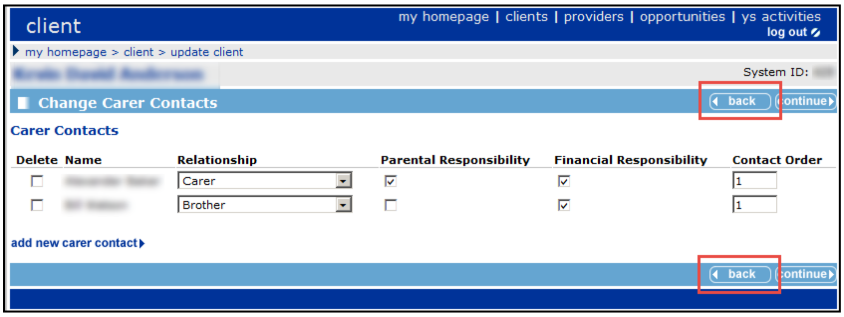
When you click a button or link in OneIYSS, you only need to click <u>once</u>. Do not double-click as this can:

- slow the rate that pages are displayed on the screen.
- stop searches, if you click more than once on a **search** button.

Saving data

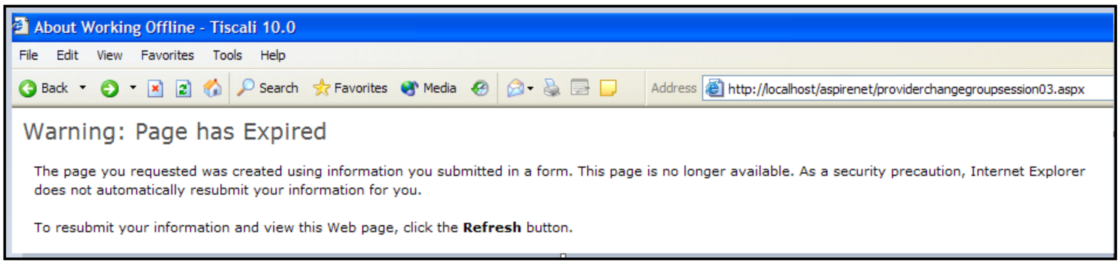
In OneIYSS, to save your changes, click the **continue** button. Occasionally however, there may be more than one dialog for adding information (e.g. Step 1 of 4) so in this case, clicking the **continue** button leads you through the steps.

If you change data in OneIYSS, but then decide that you do <u>not</u> want to save those changes, use the back buttons on the right-hand side (at the top and bottom of the dialog) rather than the back button on your browser.



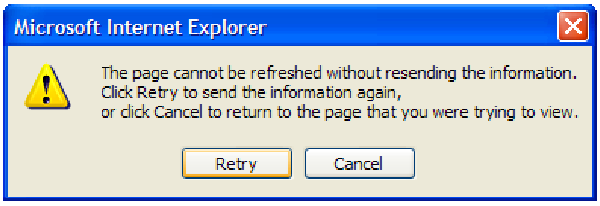
Browser Back Button and Page Expired message:

You should not use your browser's back button while working in OneIYSS. However, if you do click your browser's back button to try to return to the previous screen, the following message is sometimes displayed, **Warning: Page has Expired**.



To try to recover the expired data:

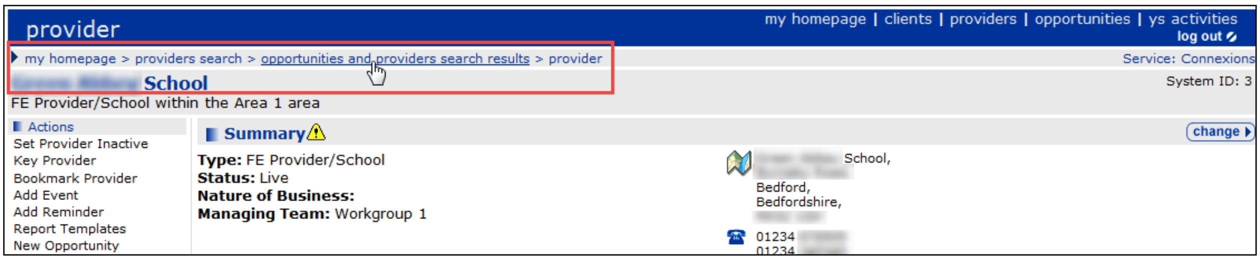
1. Click the **Refresh** button on the browser toolbar, or click the **F5** key, to display the following message:



2. Click the **Retry** button to display the previous dialog.

Breadcrumb trail

The breadcrumb trail shows the navigational path from the homepage to the displayed screen. Breadcrumb trails are displayed below the dialog title bar and are clickable, to provide a link back to previous pages. You should use the breadcrumb trail whenever possible instead of trying to use your browser's back button.

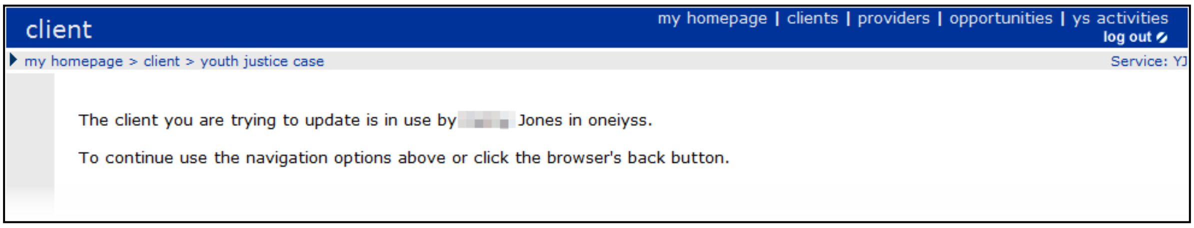


Unlocking Records

Client, opportunity and provider records are automatically locked out to other users durimg editing. This prevents other people from entering information until the editing user has saved the changes. These records might remain locked if the session is terminated before the user has successfully logged out. Records locked in this manner are unlocked when the Cleanup job runs overnight. However, they can also be unlocked by users with the 'Change User Security Details' permission, using the IYSS web application.

> ***NOTE:*** *If you are experiencing a large number of locked records, contact your system administrator or refer to the One IYSS System Administration Handbook Part 1 for more information and troubleshooting recommendations.*

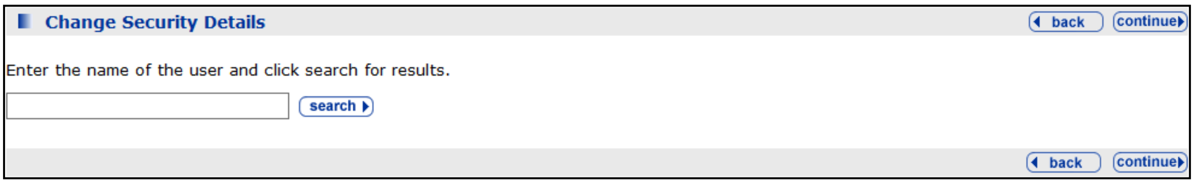
If a record is locked out, the following message is displayed to any users who attempt to edit it:



Before unlocking records, ensure that the user to whom they are locked out has logged out of the system as this process tidies up and unlocks <u>all</u> of that user's active sessions and locked records.

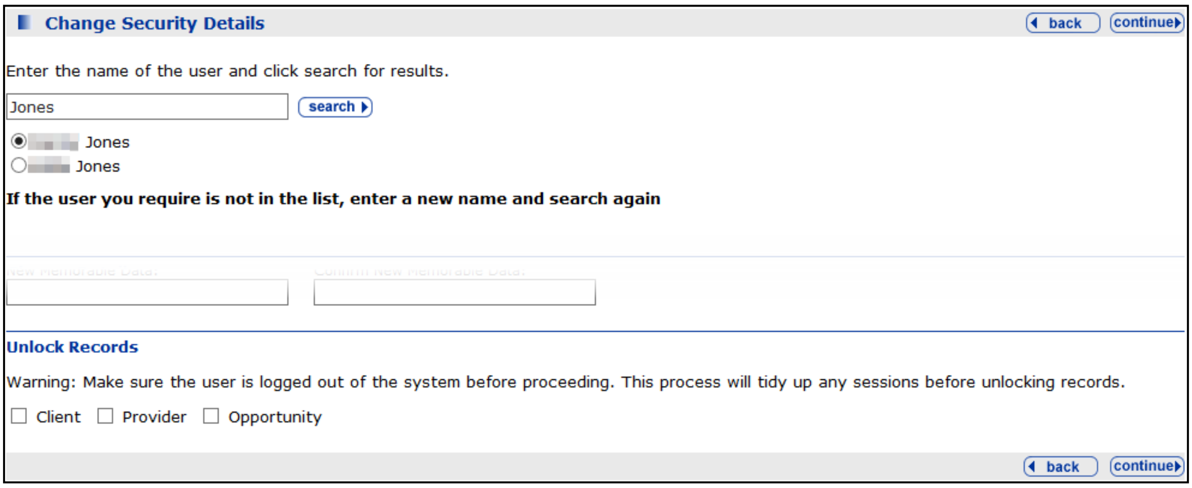
To unlock the records:

1. In the **IYSS Links** panel of **my homepage**, click the **User Security Details** hyperlink to display the **Change Security Details** page.



2. Enter the name of the user in the search field.
3. Click the **search** button to display the results.

4. Select the required user.
5. Click the **continue** button to display the security details below the results list.



6. In the **Unlock Records** panel, select the required check box.
7. Click the **continue** button. The records are unlocked and you are taken back to **my homepage**.

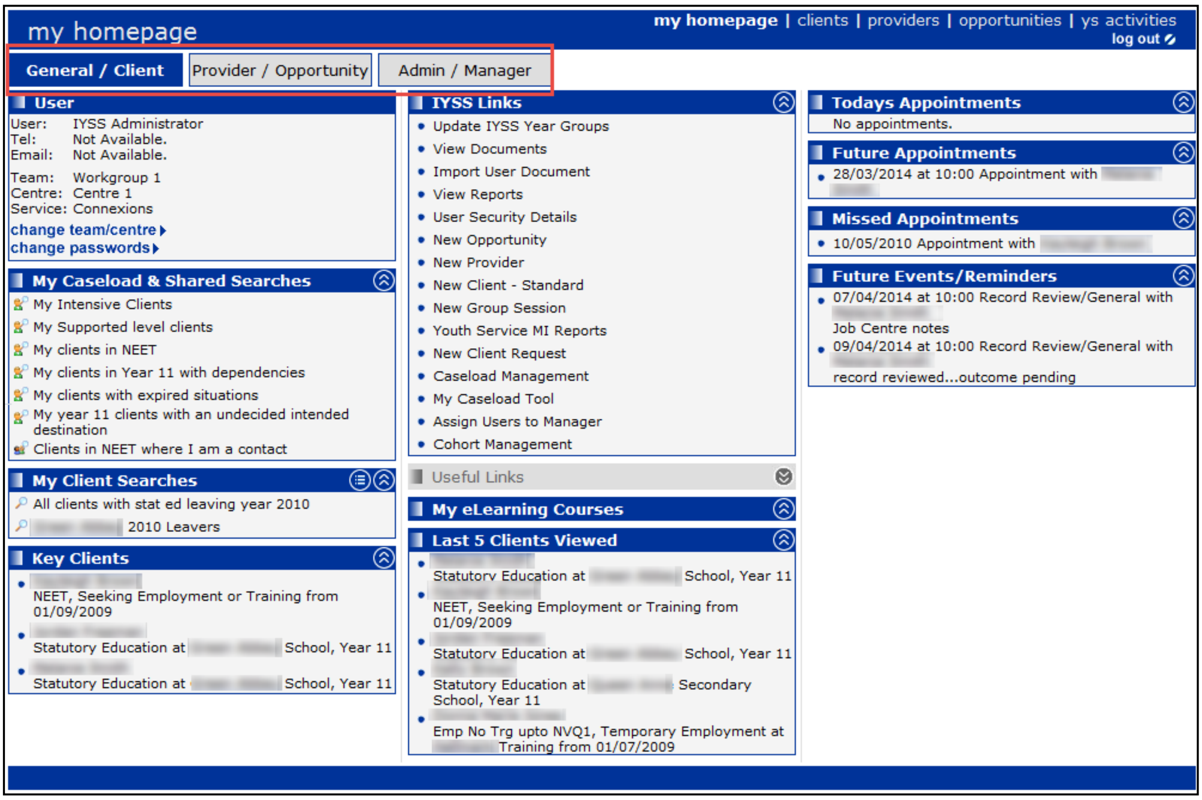
02 | About My Homepage

This chapter describes some common functions displayed on **My Homepage**.

My Homepage

The OneIYSS homepage contains modules to help you manage your caseloads by displaying links to services you can set up and configure locally. To achieve this, **My Homepage** has three different views of IYSS data:

- **Client / General**
- **Provider / Opportunity**
- **Admin / Manager**.



> ***NOTE:*** *Not all users see the same layout in **My Homepage**. OneIYSS modules and options depend on your security permissions.*

Client/General View

User

This module displays your user name, team, centre and service. If you work for multiple centres or teams, you can click the **change team/centre** link to select a different team or centre. You can also change your password and your memorable login word by clicking the **change passwords** link.

Search My Caseload

This module enables you to search for clients in your caseload. Enter the search criteria in the search box, e.g. **client ID** or **surname**, then click the **go** button.

My Caseload & Shared Searches

This module contains pre-set searches. Click on a search link, e.g. **My clients in NEET**, to display clients that match the preselected search criteria.

To display notes about a pre-set search, hover your mouse over the search name icons.

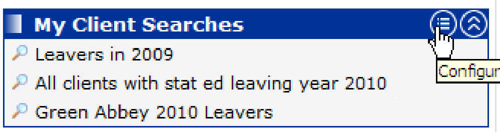
My Client Searches

This module displays your saved searches. To save time, you can save all your frequently-used searches and access them in the future with one click.

NOTE: *You can collapse each module using the* ***hide*** *button , or expand using the* ***show*** *button .*

To delete a saved search:

1. Click the **configure** button in the panel header, to display the **Delete My Searches** dialog.



2. Select the search you want to delete, then click the **continue** button to return to **My Homepage**.

Key Clients

To save time you can assign ‘key’ status to your most frequently used client records. Key clients are displayed in this module and you can access the full client record by clicking the client name. The number of key clients that can be displayed in this module is set by your organisation.

For more details on assigning key status, see Creating a Key Client on page *60*.

IYSS Links

IYSS Links give you quick access to commonly-used data entry screens, for example to add new records, group sessions, run reports etc. The links displayed in this module depend on your OneIYSS permissions.

Useful Links

This module contains useful ‘one click’ links to frequently-used online documents or files.

My eLearning Courses

E-learning courses on which you are enrolled are displayed here. Click a course name to display the course details.

Last Clients Viewed

This module displays a list of the last clients you have viewed. The number of clients that are displayed is set by your organisation. To open the full client record, click the client name.

Appointments

Todays Appointments show any client appointments with today’s date.

Future Appointments show any client appointments with a date after today.

Missed Appointments show any client appointments with a past date where no outcome has been recorded.

Future Events/Reminders

This module displays:

- follow-up interactions which you have added
- consent review clients that you are the lead for

- clients that have been added to your caseload.

Referrals Awaiting an Outcome

This module displays a list of client referrals for which there is no outcome yet.

Plan Reviews

This module displays a list of plans that need reviewing.

Provider/Opportunity View

Key Opportunities

To save time you can assign ‘key’ status to your most frequently-used opportunity records. Key opportunities are displayed in this module and you can access the full record by clicking the opportunity name. The maximum number of key opportunities that can be displayed in this module is set by your organisation.

Key Providers

To save time you can assign ‘key’ status to your most frequently-used provider records. Key providers are displayed in this module and you can access the full record by clicking the provider name. The maximum number of key providers that can be displayed in this module is set by your organisation.

Last Providers Viewed

This module displays a list of the last providers you viewed – the maximum number displayed is set by your organisation. Click the provider name to display the provider record.

My Saved Lists

To save time you can save lists of clients that match a specific opportunity. Click a list name to display the opportunity record.

More Information:

Creating a Saved Client List on page *11*

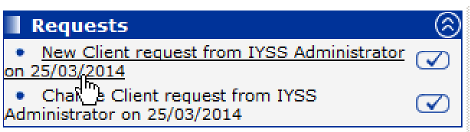
Admin/Manager View

Baselines

This module displays a list of pre-set baseline searches. You can display the search results by clicking the search name. This module is normally restricted to administrators.

Requests

This module is only displayed if you have system permission to manage requests. To display a request, click the request name:



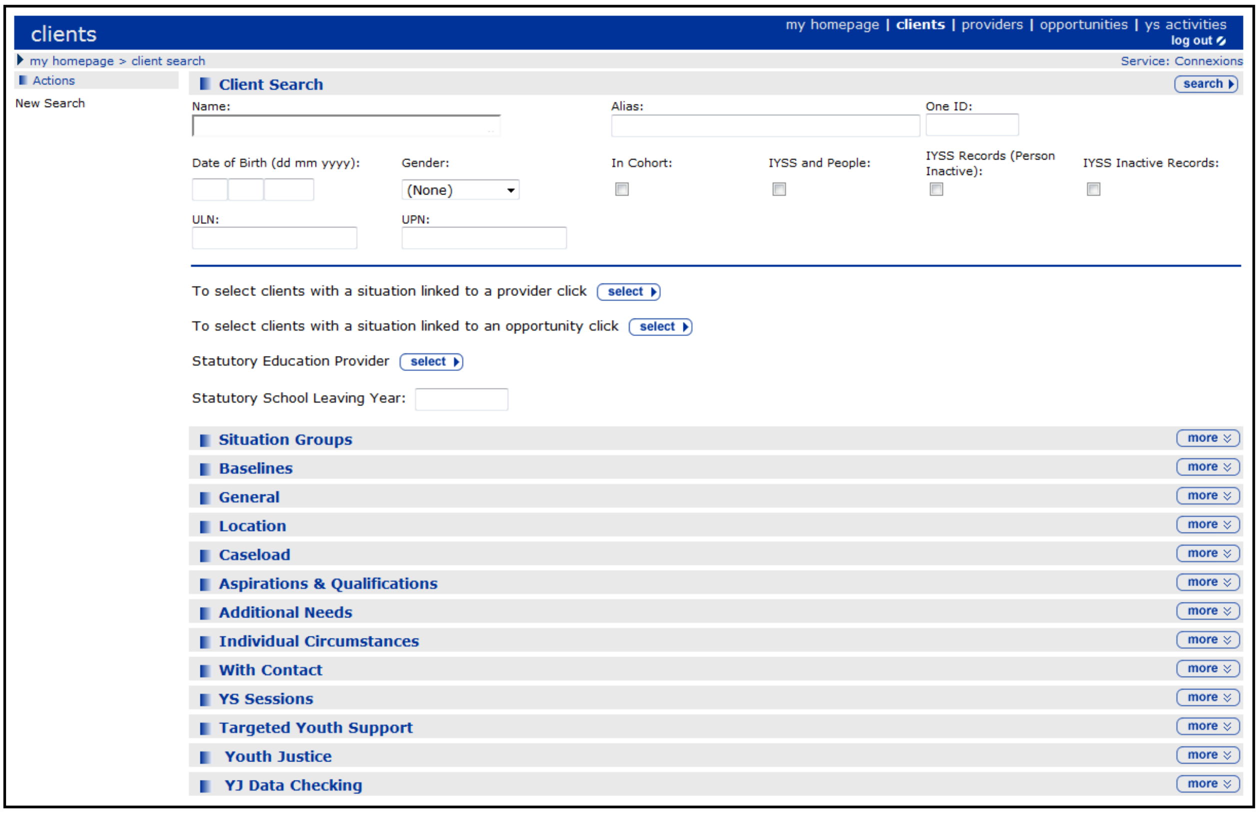
When you have completed the request, click the **tick** icon to remove it from the list.

03 | Client Searches

Searching for and viewing a single client record

This procedure shows how to search for a single client, view the search results and access the relevant client record.

1. Click the **clients** link at the top of the screen to display the **Client Search** dialog.



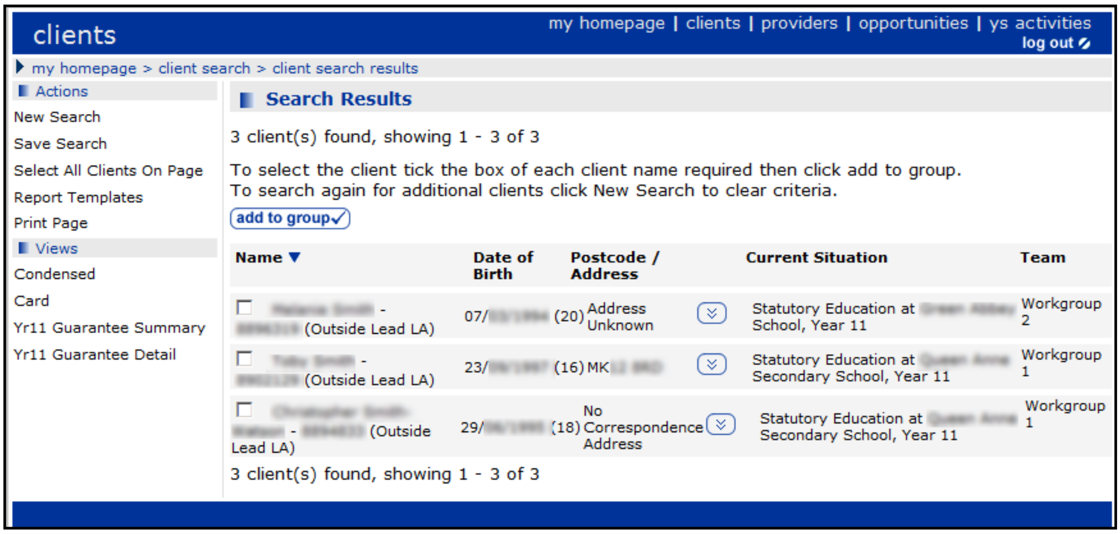
2. **Enter** a full name, e.g. Jordan Smith, or a partial name, e.g. J Smith in the **Name** field.

   By default, only clients who exist as IYSS clients are returned. To widen the search:

   - Select the **In Cohort** check box to return clients in the One Youth suite cohort
   - Select the **IYSS and People** check box to return clients in IYSS and the One People database
   - Select the **IYSS Records (Person Inactive**) check box to return clients where the person is **Inactive**
   - Select the **IYSS Inactive Records** check box to return inactive records in IYSS, e.g. if clients are not in the cohort age range.

> ***NOTE:*** *For more information on inactive clients and records, see* *Making a Client Inactive on page 26.*

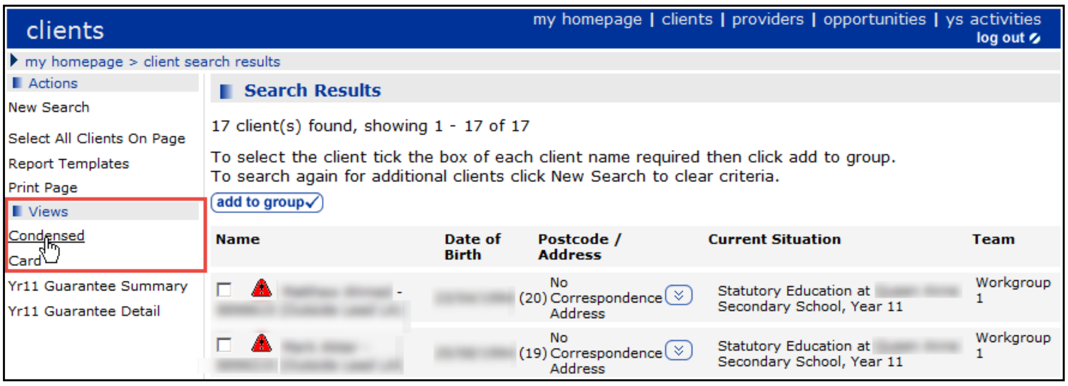
3. Click the **search** button to display the **Search Results** dialog.



4. If required, scroll down the results to view more clients. If you have returned a large number of results, the **next** and **previous** buttons are displayed.
5. Click the client's name to open their OneIYSS client record.

Search tips:

- You can sort the search results in the column marked with a **sort** button ▼. Clicking the **sort** button reverses the sort order. You can sort any column by clicking the column heading.
- In the **Postcode/Address** column, to toggle between displaying the postcode only and showing the full address, click the **show** and **hide** buttons.
- You can display different **Views** of the search results. The **Condensed** view displays summary information for all returned clients in columns. The **Card** view displays the summary information in a card format. The default view is **Condensed**.

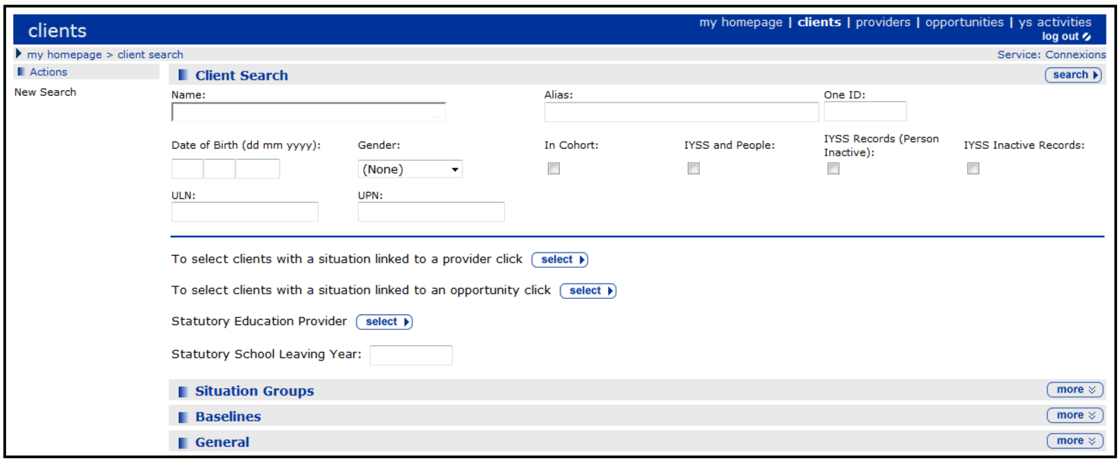


- To make another search, click **New Search** in the **Actions** panel to clear any search criteria, allowing you to make a new search.
- Clients who exist in the One database as a student but are <u>not</u> yet marked as IYSS clients, are displayed with **Non IYSS Client** in the search results. You cannot display these records until additional data has been added. For more information, see [Updating a Non IYSS Client](#) on page *15*.

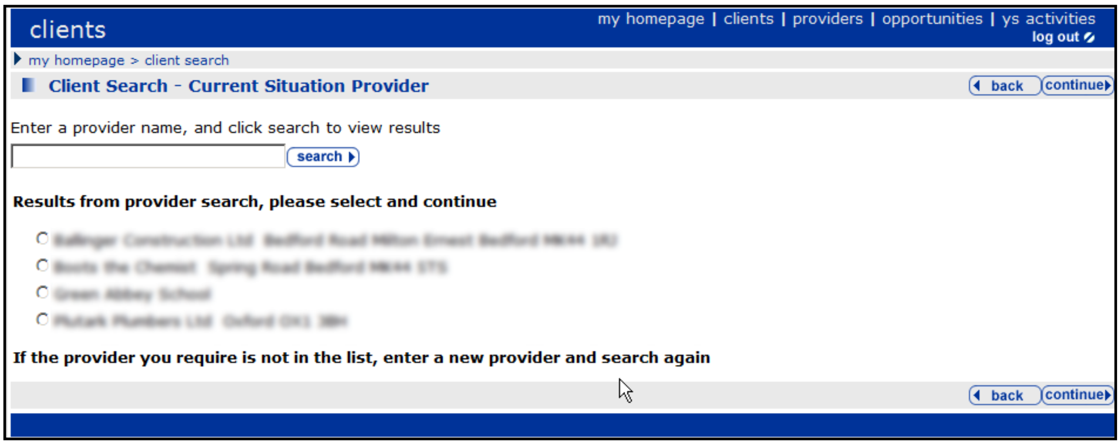
Searching for Multiple Clients

This procedure shows how to carry out a search using multiple criteria. For example, the steps below show how to search for clients in a specific year group at particular a school:

1. Click the **clients** link at the top of the screen to display the **clients** dialog.



2. Click the **select** button adjacent to **To select clients with a situation linked to a provider** to display the **Client Search – Current Situation Provider** dialog.



3. Enter a provider name (or the word 'school' if you don't know the exact name), then click the **search** button to display a list of matching education providers.
4. Select a provider from the search results, and click the **continue** button to display the name of the provider you selected.
5. To narrow the search to a specific type of client, e.g. Year 11 students, enter a year in **Statutory School Leaving Year**.

NOTE: *You can refine the search further using the other search fields, e.g. Gender, Situation Groups, Location etc.*

6. Click the **search** button to display a list of clients that match the search criteria.

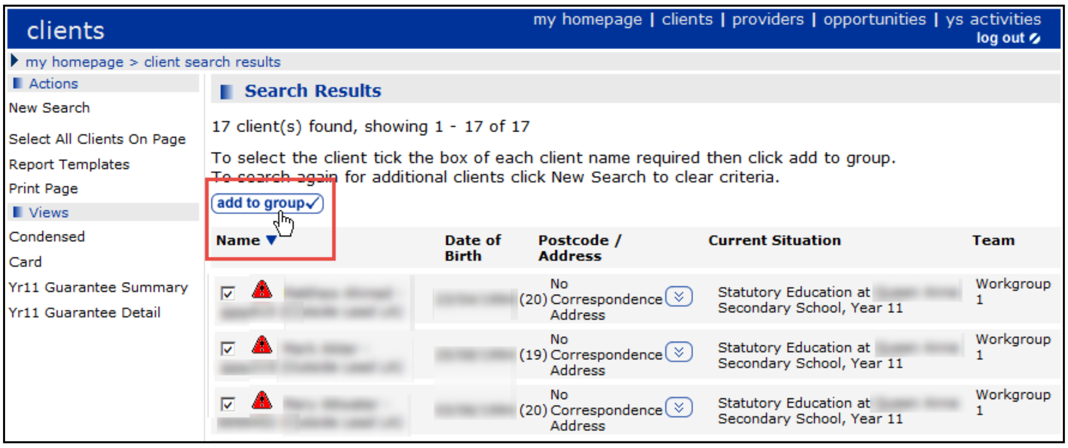
Adding a Client Group

You can add clients to a client group on which you can run reports or perform bulk updates. Client groups are temporary and only last for as long as your current session. If you wish to make a permanent group of clients, complete the following task then see Creating a Saved Client List on page *11.*

1. Search for students based on your required criteria. For more information, see *Searching for Multiple Clients* on page *10*.
2. To add clients to the group, from the clients returned by your search:
   - Select the clients you want to add to a client group by selecting the check box adjacent to the student's name.

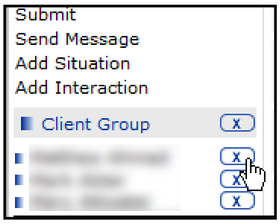
     or

   - To add all displayed clients, click **Select All Clients On Page** on the **Actions** panel.
3. Click the **add to group** button to add the selected clients to the **Client Group** panel on the left-side of the dialog.



> ***NOTE:*** *Client group tasks are shown in the* ***Actions*** *and* ***Group Actions*** *panels on the left-side of the dialog. The options displayed depend on your permissions.*

To remove a client from the **Client Group,** click the **remove** button next to their name in the left-hand panel.



4. To add more clients, perform a **New Search** and select the required check boxes and click the **add to group** button.
5. Once you have created a group, you can use it to run a report or perform a bulk update via the **Actions** side panel.

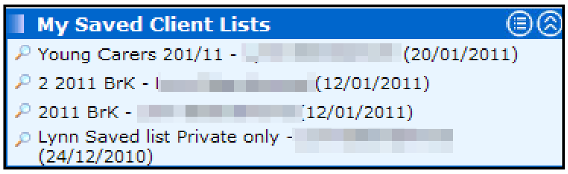
Creating a Saved Client List

You can create a permanent client list that is saved even after you log out.

1. Create a client group. For more information, see Adding a Client Group on page *10*.

2. After you create a client group, click the **Create Saved List** link from the **Actions** panel in the **Client Search Results** page.

   Saved lists are displayed in the **My Saved Client Lists** panel on **My Homepage**.



Deleting a Saved Client List

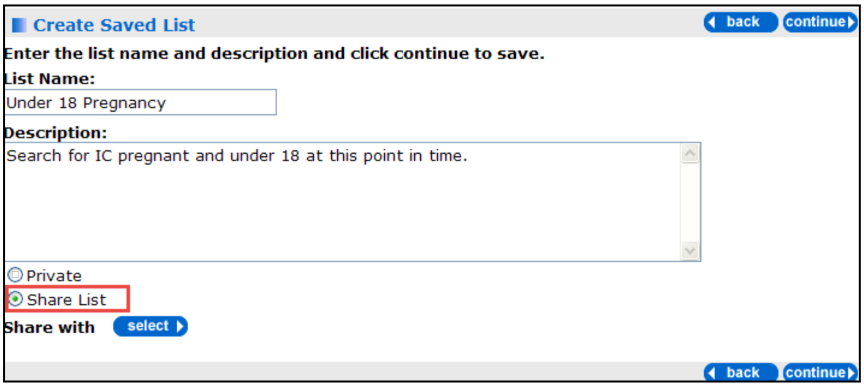
To delete a saved client list:

1. Click the **Configure** button to display the **Delete My Saved Client Lists** page.
2. Select the check box for the client list you wish to delete.
3. Click the **continue** button.

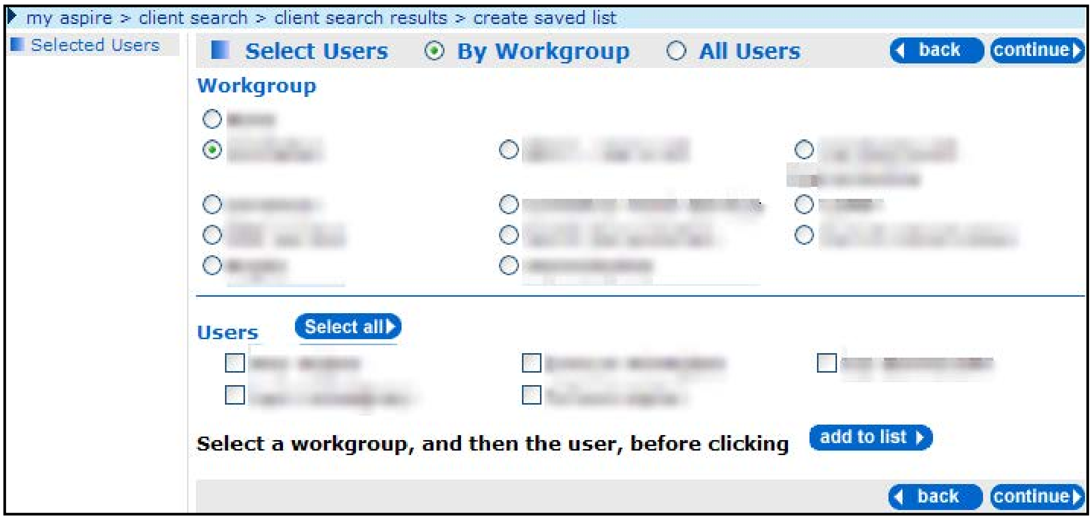
Share Saved Lists

If you have the appropriate OneIYSS permission, you can create a list of search results and share it with other users.

Select the **Share List** radio button, then click the **select** button to display a list of available users with whom you can share the list.



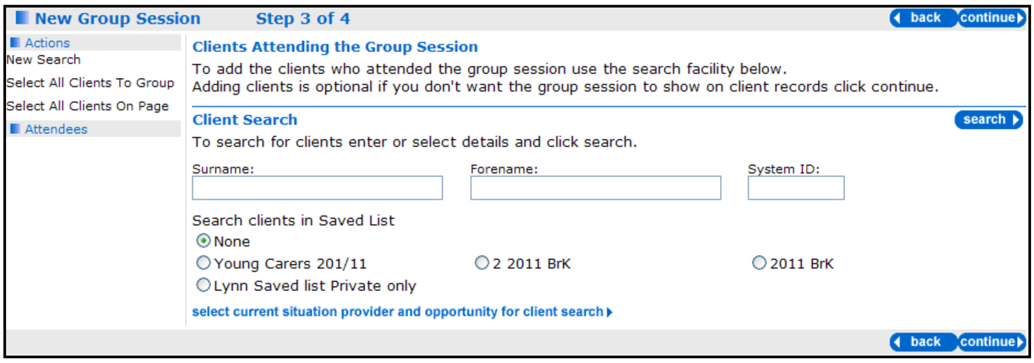
You can select users either individually using workgroup filters, or **Select All** users in a workgroup. The saved list is then copied to these users (who can delete it if they have no need for it).



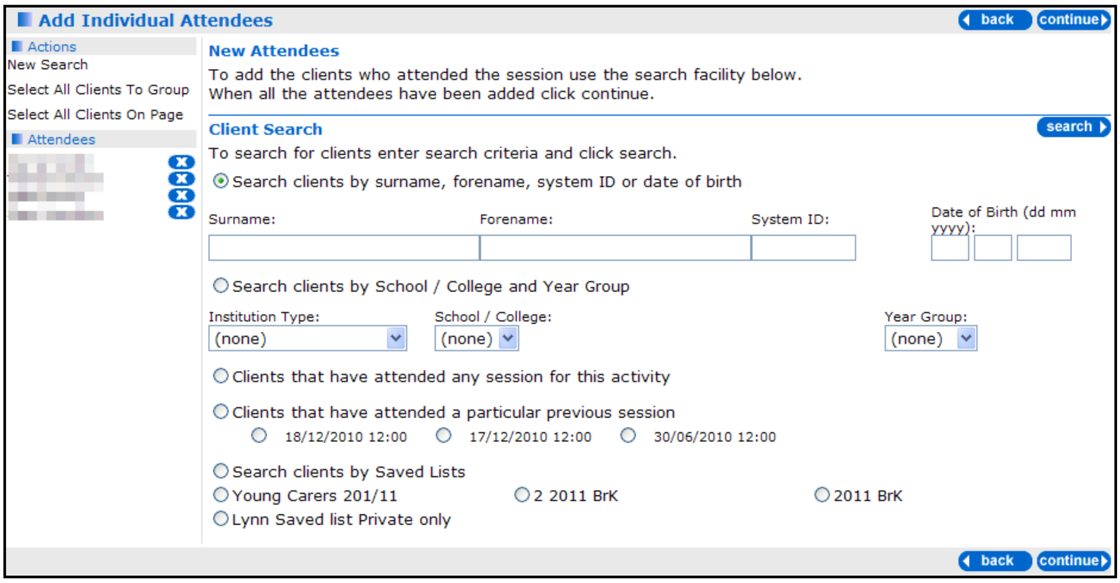
Using Saved Lists

You can retrieve saved lists from the **My Saved Lists** portal in **My Homepage**. Saved lists can also be retrieved and used in the **New Group Session** dialog and **YS Sessions** dialog, for example:

1. Select the **Saved List** then click the **search** button to return the list of clients.



2. If required, add clients to the group as you would normally (for more details, see Adding a Client Group on page *10*).

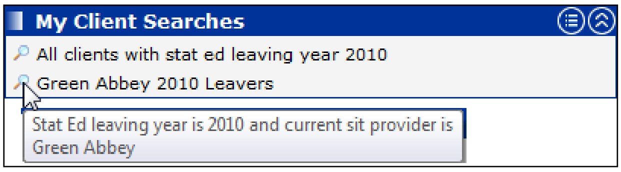


Saving your Searches

Once you have performed a search, you can save its search criteria for future use.

1. Click **clients** at the top of the screen to display the **clients** dialog.
2. Enter your search criteria – for details, see Searching for Multiple Clients on page *10*.
3. Click the **search** button to display the results.
4. Click the **Save Search** link in the **Actions** panel to display the **Save Search** dialog.
5. Enter a **Search Name**.
6. If required, you can add descriptive **Notes**.
7. Click the **continue** button. Your search details are saved to **My Client Searches** panel on **My Homepage** page.

   Your search notes are displayed by hovering over the icon next to the search name:



To run a saved search, which displays a list of clients currently matching the criteria, click on the saved search name in the **My Client Searches** panel.

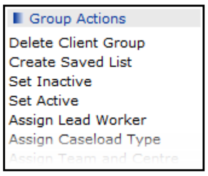
Bulk Updating Clients

If you have the necessary permissions, you can update certain elements of client records in bulk. For a description of the available bulk updates and their governing permissions, please see the *Client Bulk Updates* table in the *Security Group* chapter of the *One IYSS System Administration Handbook Part 1.*

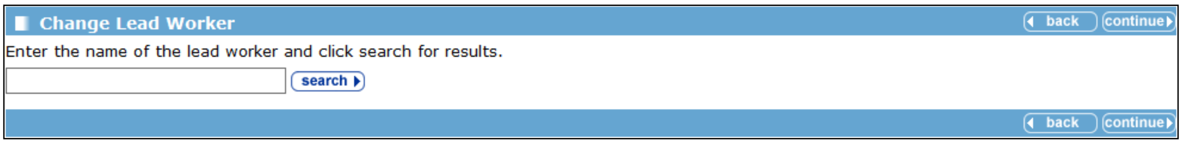
WARNING: *Bulk updates are irreversible. There is no undo function. Ensure that only the appropriate clients are included in the update and that the correct update is applied.*

To apply a bulk update:

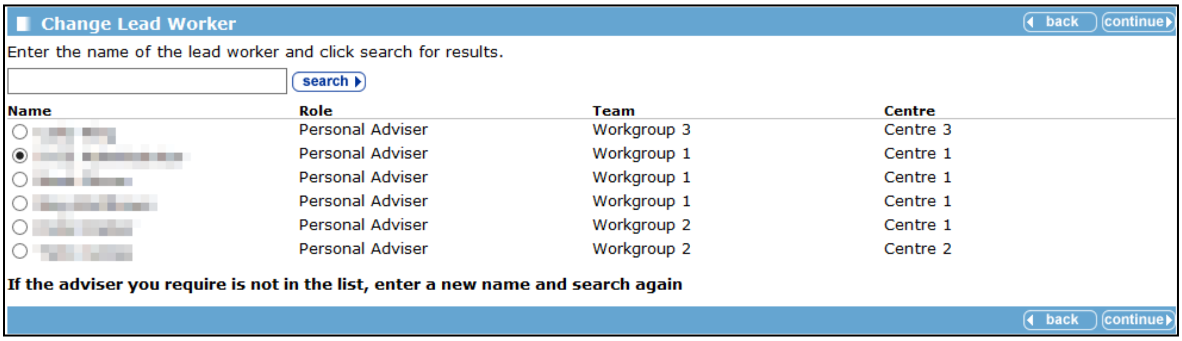
1. Create a **Client Group**, either by searching for the required clients (see Searching for Multiple Clients on page *10*) or by opening an existing list from the **My Saved Client Lists** panel of my homepage (see Creating a Saved Client List on page *11*) and adding them to a group (see Adding a Client Group on page *10*).
2. Click the required hyperlink in the **Group Actions** panel. The actions displayed depend on your permissions. For these instructions, the **Assign Lead Worker** action will be used as an example.



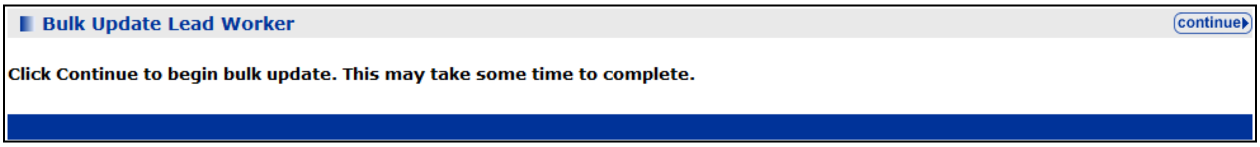
3. The **Change Lead Worker** screen is displayed.



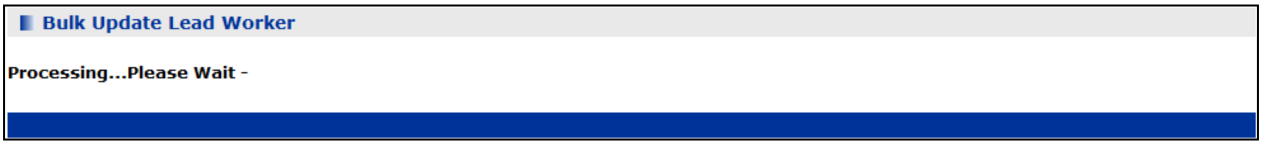
4. Follow the on-screen instructions, in this case by entering the new lead worker's name and clicking the **search** button.



5. Select the appropriate option from the list.
6. Click the **continue** button. The **Bulk Update Lead Worker** screen is displayed.



7. Click the **continue** button. The **Bulk Update Lead Worker** screen changes to indicate that the update is being applied.

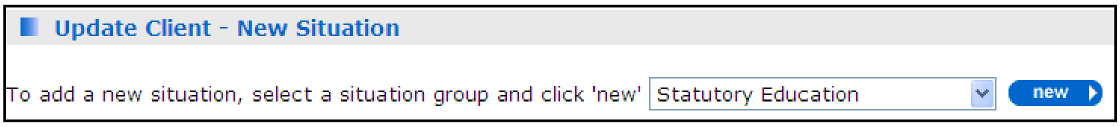


8. After it has finished, the **Bulk Update Lead Worker Confirmation** screen is displayed with a summary of the update. Click the **continue** button to return to the **Client Search** screen and **Client Group** you just updated.

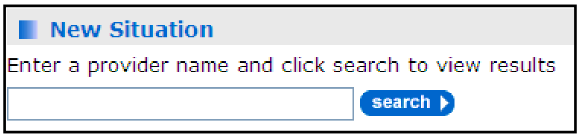
Updating a Non IYSS Client

To open a client record in OneIYSS, the record must be marked as 'IYSS'. If you search for a client who exists in the One database as a student but is not yet marked as an IYSS client, the message **Non IYSS Client** is displayed in the search results. You cannot open the record until additional CCIS data has been added, as described in the following procedure.

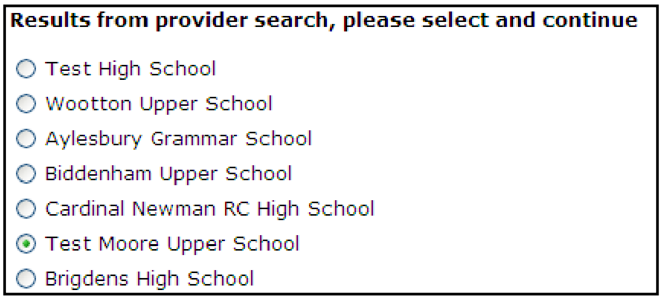
1. From the results of a client search, click on the client's **Name** you want to update to display the **Update Client – New Situation** dialog.
2. Add a statutory education situation for the client:
   a. Select **Statutory Education** from the dropdown list.



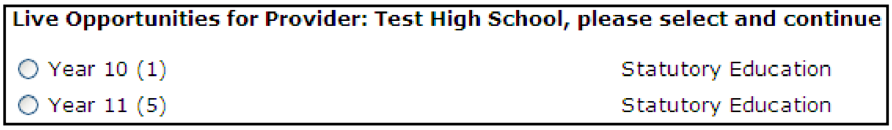
   b. Click the **new** button to display the **New Situation** dialog.



   c. Enter the name of the client's statutory education provider in the **Enter a provider….**search box, then click the **search** button to display the search results.

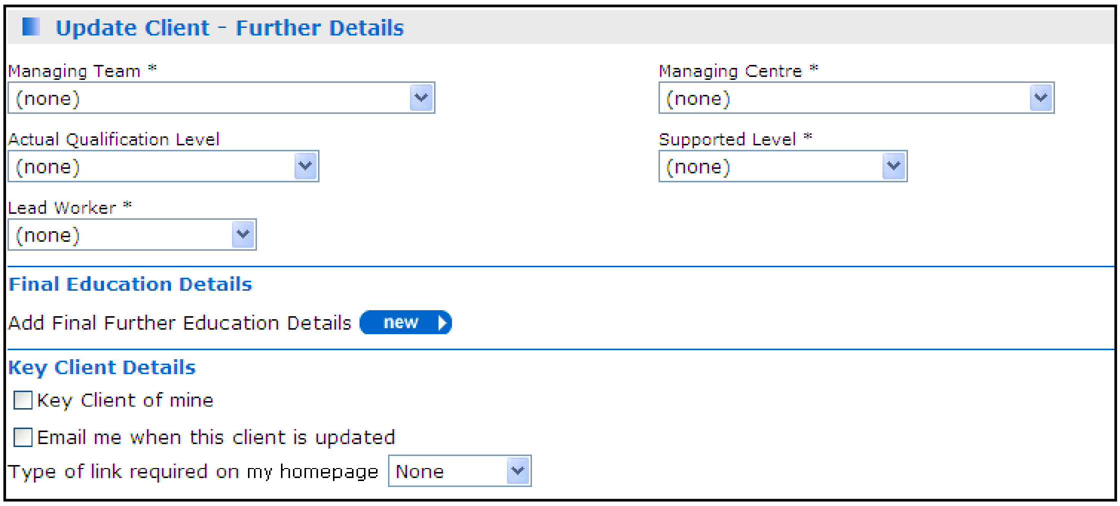


   d. Select the required provider from the search results, then click the **continue** button to display the **Live Opportunities for Provider:** dialog.



   e. Select the required year group for the client, then click the **continue** button.
3. In the **New Statutory Education** section:
   a. Enter the date the client started.
   b. Select a course level, e.g. **GCSEs**.

4. Click the **continue** button to display the **Update Client - Further Details** dialog.



5. Complete the following fields:

Field	Description
Managing Team	Mandatory: Select the **Team** who takes responsibility for the client.
Managing Centre	Mandatory: Select the **Centre** who takes responsibility for the client.
Actual Qualification Level	Non Mandatory: If the client has sat qualifications, select their overall academic level.
Supported Level	Mandatory: Select the client's level of need.
Lead Worker	Mandatory: Select the member of staff whose caseload the client will be assigned to.
Final Education Details	If the client has left education: 1. Click the **New** button to display the **Add Final Education Provider** dialog. 2. Enter the date the client left education. 3. Search for, then select the client's education provider. 4. Click the **Continue** button.
Key Client of mine	Mandatory: Select the check box to make the client a key client on your caseload.
Email me when this client is updated	Non Mandatory: Select to be notified via email if a colleague updates this record.
Type of link required on my homepage	Non Mandatory: If you selected **Key Client of Mine** (above), select one of the following: **None**: The client does <u>not</u> appear in the **Key Client** portal on **My Homepage**. **Permanent**: The client appears in the **Key Client** portal on **my homepage** until you deselect it, using the **Key Client** options. **Temporary**: Client only appears in the **Key Client** portal when the record has been updated by a colleague.

6. Click the **continue** button to display the **Update Confirmation** dialog.
7. Click the **continue** button again to return to the client record.

Adding a Client to IYSS

There are two ways that you can add new clients to IYSS. Both methods are accessible from the **IYSS Links** panel on **My Homepage**:

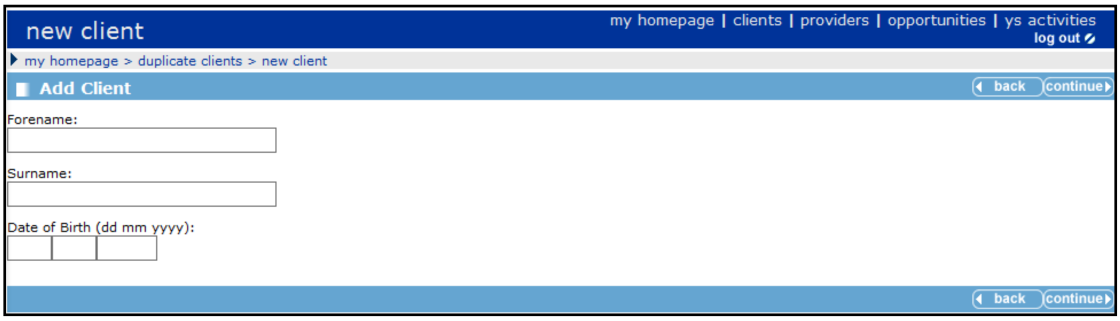
- **New Client – Standard**. This is the usual process for manually adding a new client to IYSS.
- **New Client – Simple**. This process enables you to add a new client without needing to add as much data as the standard method.

> ***NOTE:*** *The IYSS permissions are called* **Client Add Standard** *and* **Client Add Simple** *respectively.*

Adding a New Client - Standard

This procedure shows how to add a new client to IYSS using the standard method.

1. From **My Homepage**, click the **New Client - Standard** link in the **IYSS Links** panel to display the **Add Client** dialog.



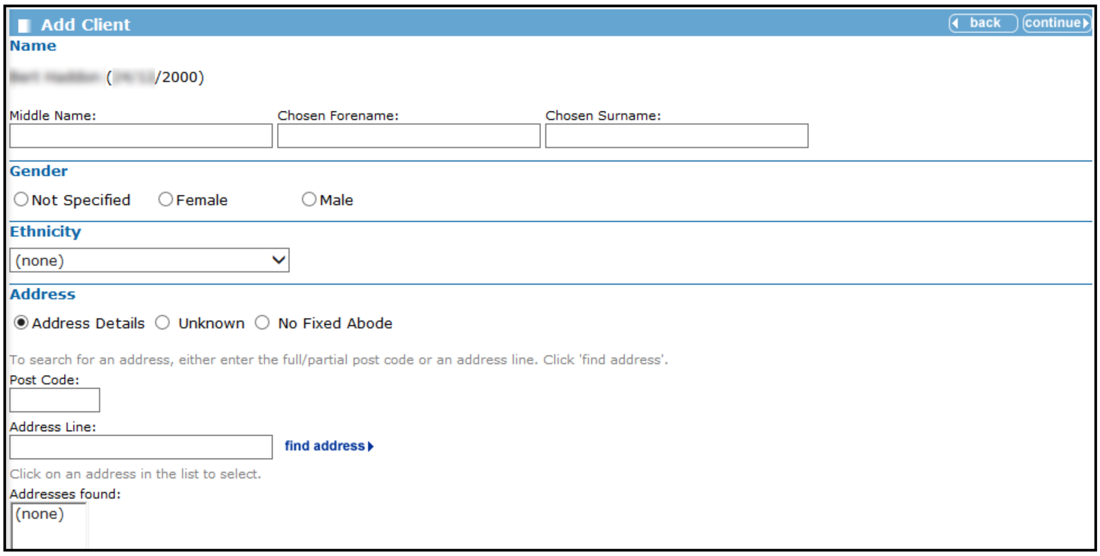
2. Enter the client's **Forename**, **Surname** and **Date of Birth**.
3. Click the **continue** button to display the **Duplicate Client(s)** dialog. Note that inactive records are included in the search results.

   If no matching clients exist, a message to that effect is displayed. Click the **continue** button to display the **Add Client** dialog.

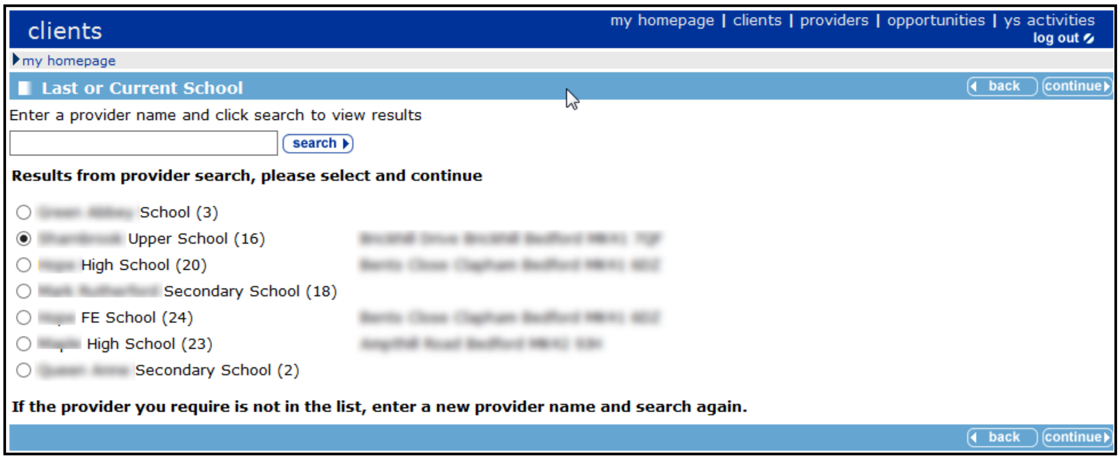
   If matching clients exist, the search results are displayed.

   - If the client already exists in IYSS, click the client's name to display their record.
   - If the client exists on One but is <u>not</u> marked as IYSS, you need to add data specific to IYSS. Click the client's name to continue.

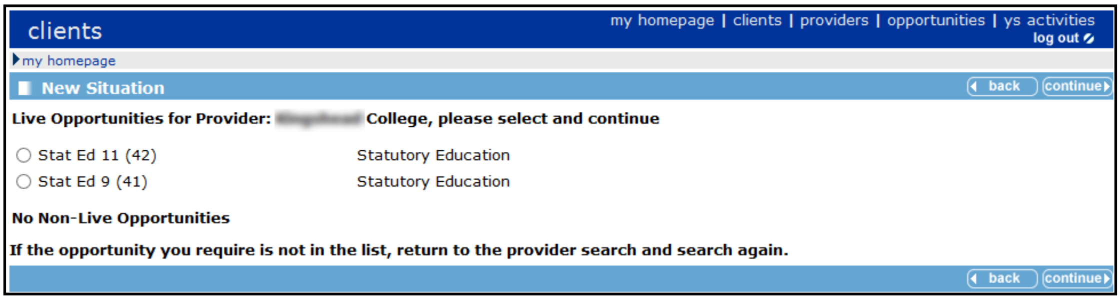
4. In the **Add Client** dialog, enter the client's personal details.



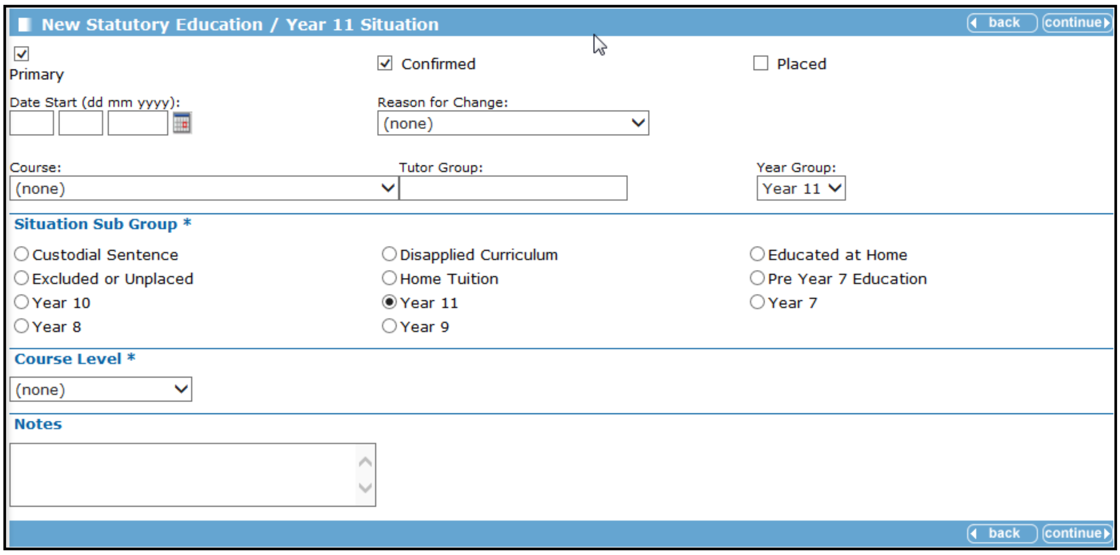
5. Click the **continue** button to display the **Last or Current School** dialog.
6. Enter the client's **Last or Current School**, then click the **search** button to display the search results.



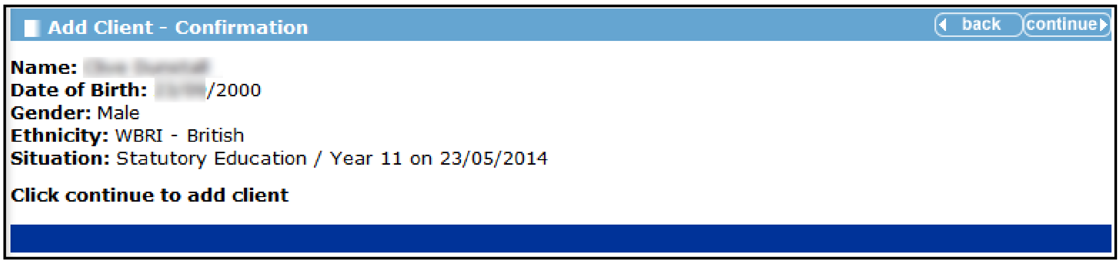
7. Select the required education provider from the search list, then click the **continue** button to display the **New Situation** dialog.



8. Select the client's current or previous statutory education year group from the list of **Opportunities**, then click the **continue** button to display the **New… Situation** dialog.



9. Enter the details of the **Situation,** then click the **continue** button to display the **Add Client – Further Details** dialog.
10. Complete the mandatory fields, then click the **continue** button.
11. If the client has left education, complete the **Final Education Provider** details.
12. On the **Add Client - Confirmation** dialog, confirm the details you have entered for the client.



13. Click the **continue** button to add the client record to IYSS. The client record is displayed.

> **More Information:**
>
> The Client Record chapter on page *31*

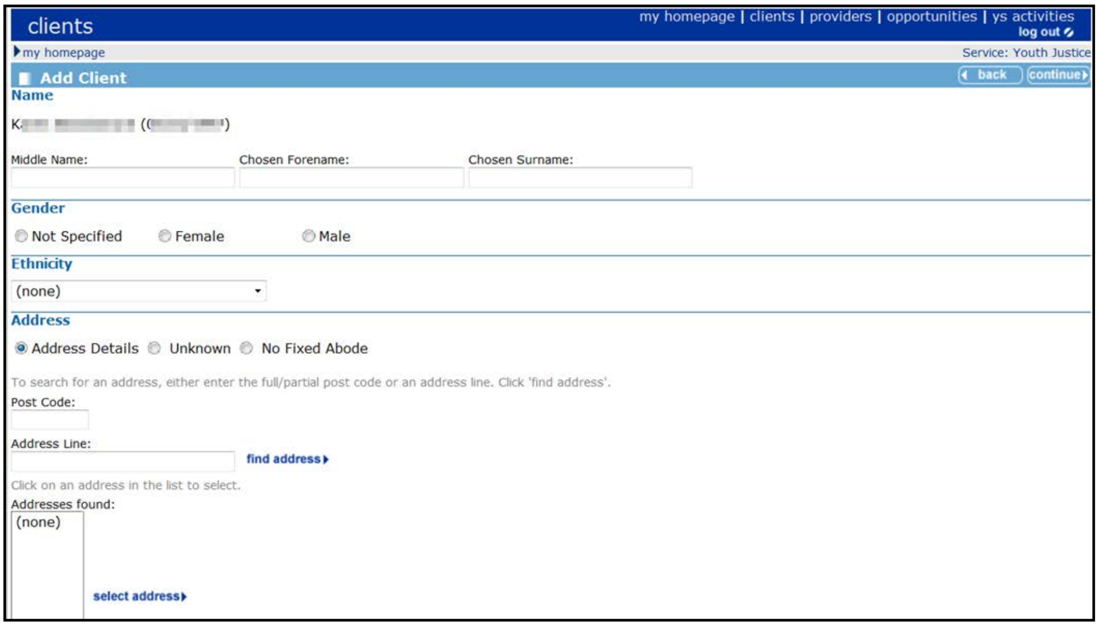
Adding a New Client - Simple

This procedure shows how to add a new client to IYSS using the simple method.

1. From **My Homepage** page, click the **New Client - Simple** link in the **IYSS Links** panel to display the **Add Client** dialog.
2. Enter the client's **Forename**, **Surname** and **Date of Birth**.
3. Click the **continue** button to display the **Duplicate Client(s)** dialog.

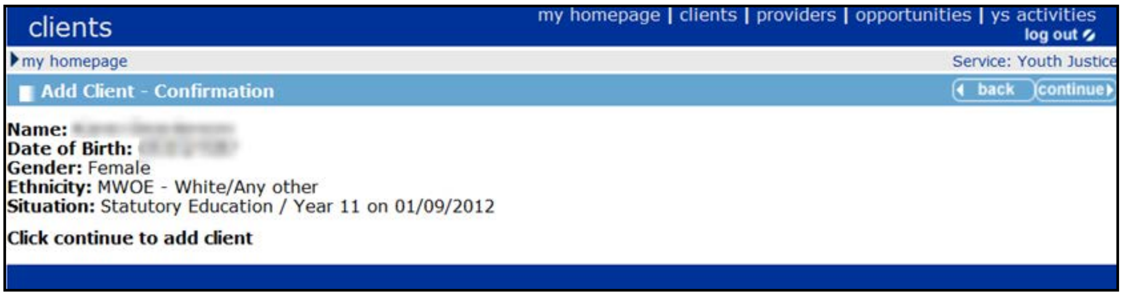
> ***NOTE:*** *As with the Standard method (described in the previous section) if any duplicates are displayed you can either a) select an existing record or b) continue to add a new record.*

4. To add a new client record, click the **continue** button to display the **Add Client** dialog.



5. Enter the details of the new client (the fields are similar to [Adding a New Client - Standard](#) on page *18*).
6. Click the **continue** button to display the **Last of Current School** dialog.
7. Enter a **provider** in the search box, then click the **search** button to display the search results.

8. From the search results, select the required provider, then click the **continue** button to display the **Add Client - Confirmation** dialog.



9. Click the **continue** button to add the client record to IYSS. The client record is displayed.

> ***NOTE:*** *OneIYSS calculates the statutory year group for the client using their DOB and creates a 'Statutory Education up to Year 11' situation with the appropriate dates.*

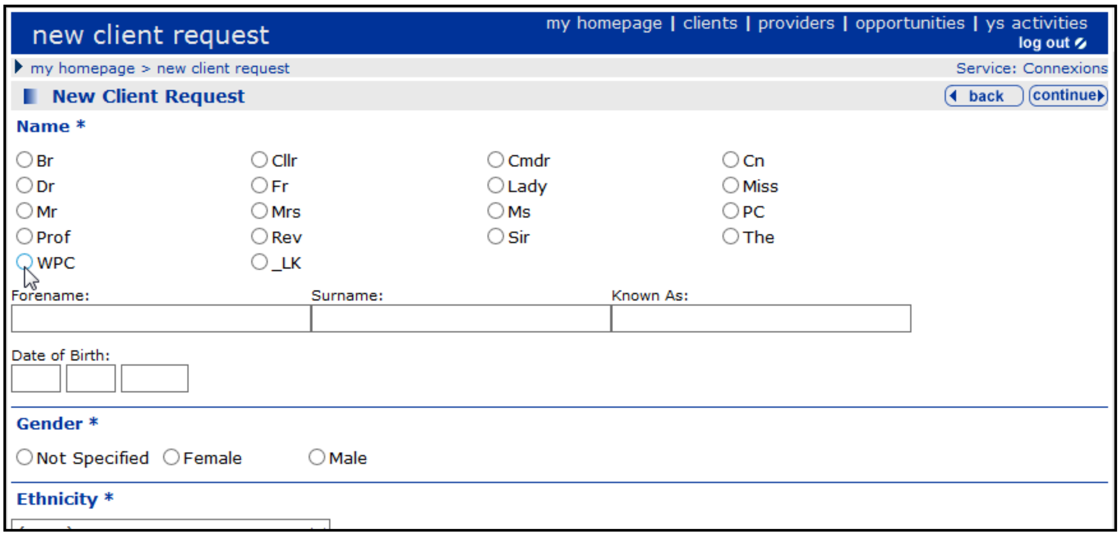
Submitting Client Change Requests

If you do <u>not</u> have the OneIYSS permissions to add a new client or change a client record, you can send a request to your system administrator to make the change.

> ***NOTE:*** *When you submit a request, you receive an automated email confirmation. When your request has been actioned and the update has been made in OneIYSS, you receive another email confirmation.*

Sending a request to add a client record

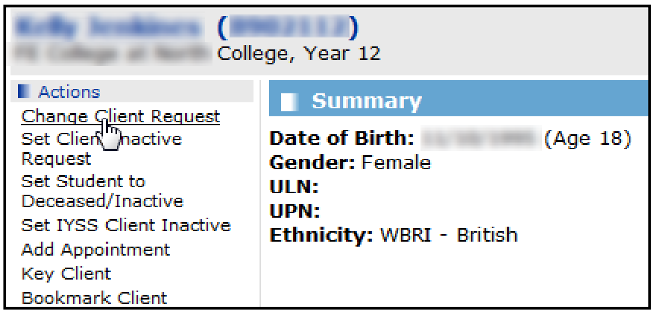
1. From **My Homepage**, click the **New Client Request** link in the **IYSS Links** panel to display the **New Client Request** dialog. If **New Client Request** is <u>not</u> available, contact your local administrator.



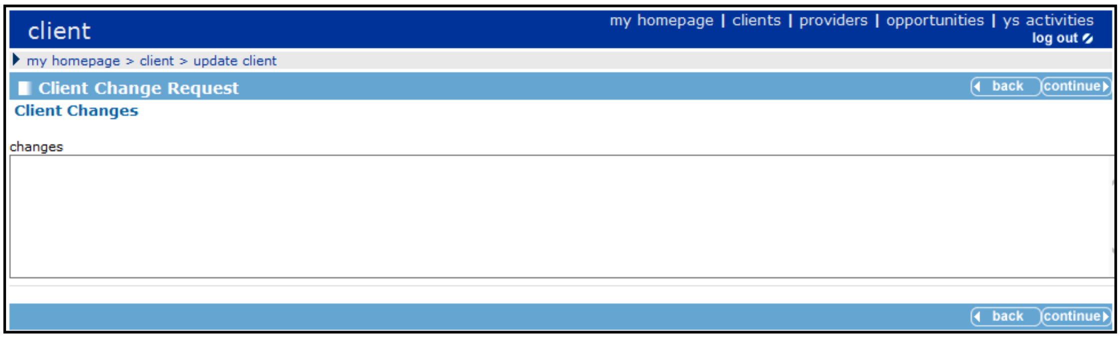
2. Complete the client details as required.
3. To save, click the **continue** button. The request for the client to be added to OneIYSS is forwarded to your system administrator.

Sending a request to change a client record

1. In the client's record, click **Change Client Request** in the **Action** panel on the left-hand side of the dialog to display the **Change Client Request** dialog.



2. Enter the details of the required change in the **changes** text box.



3. To forward the request to your system administrator, click the **continue** button.

Sending a request to delete a client record

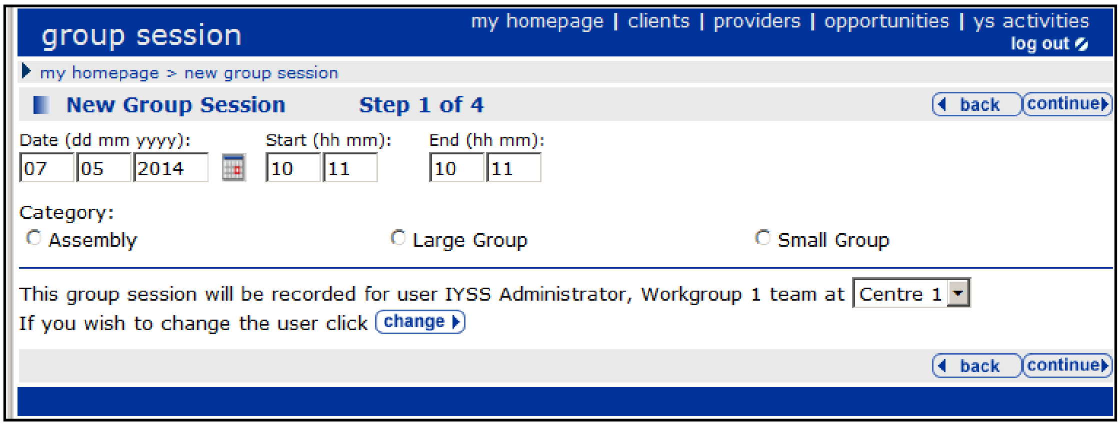
1. In the client's record, click **Delete Client Request** in the **Action** panel on the left-hand side of the screen to display the **Delete Client Request** dialog.
2. Enter the details of the change that you want in the **reason** text box.
3. Click the **continue** button. The request for the client to be deleted is forwarded to your system administrator.

Adding a Group Session

This procedure shows how to add a group session to OneIYSS. There are four dialogs which are shown as **Steps x of y** on the top of each dialog.

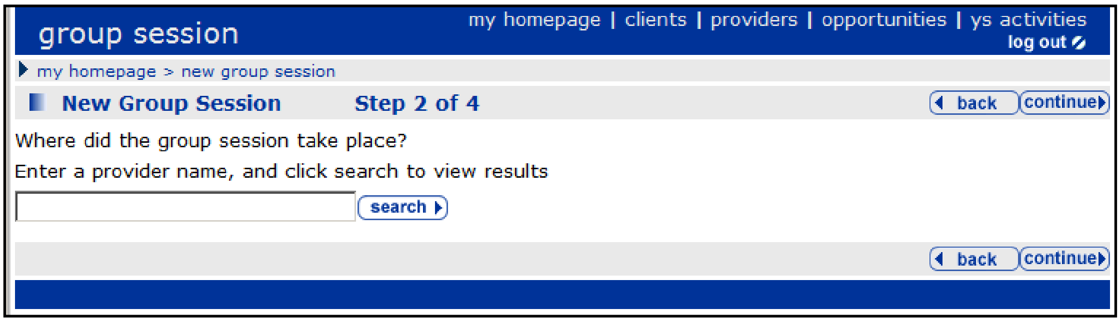
1. From **My Homepage**, click the **New Group Session** link in **IYSS Links** to display the **New Group Session Step 1 of 4** dialog.
2. Enter the **Date**, **Category** and the **Centre** responsible for the session.

> ***NOTE:*** *OneIYSS defaults to your user name for recording the session. To change the user, click the* **change** *button and add the required user.*



3. Click the **continue** button to display the **New Group Session Step 2 of 4** dialog.
4. Enter search criteria for the provider where the group session took place, by entering a **provider name** e.g. a school or college.

5. Click the **search** button to display the search results.

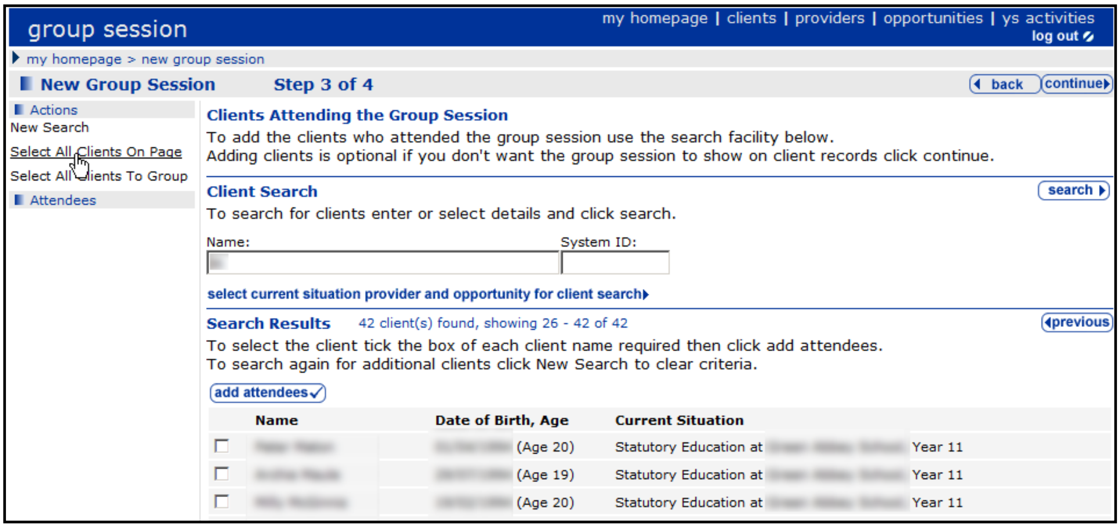


6. Select the **provider name** from the results of the provider search, then click the **continue** button to display the **New Group Session Step 3 of 4** dialog.

7. Add the clients who attend the group session, either by searching on **Name/System ID** or current situation provider/opportunity.

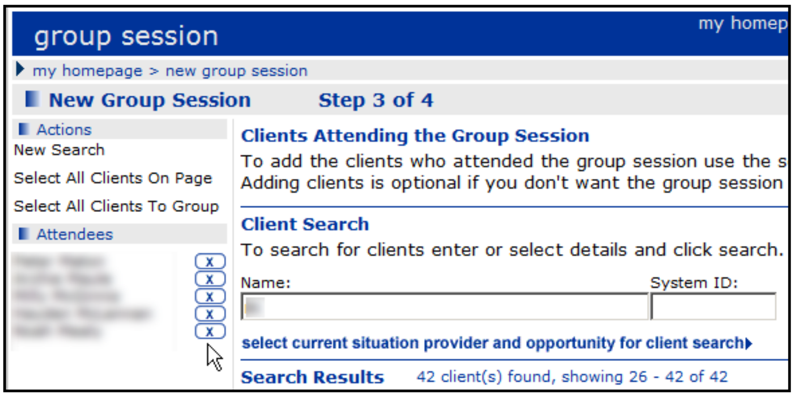
   a. Enter a **Name** or **System** ID then click the **Search** button to display the search results.

   b. Select the clients you want to add to the group sessions. To select all clients, click **Select All Clients On Page** on the **Actions** panel on the left-side of the dialog.



> ***NOTE:** To select and add all clients in 'one click', use the **Select All Clients To Group** link in the **Actions** panel.*

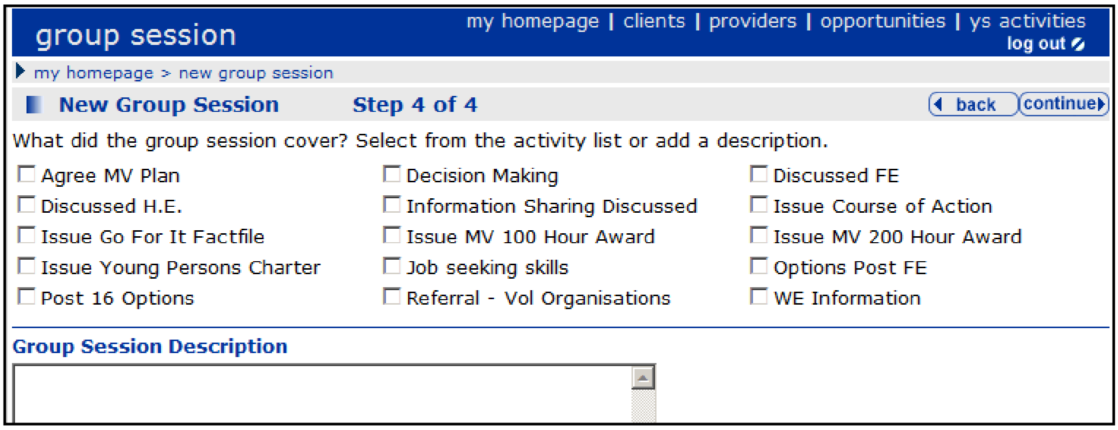
c. Click the **add attendees** link to display the selected attendees in the **Attendees** panel on the left-side of the dialog.



d. If required, search for additional clients. Click the **New Search** link in the **Action** panel and then repeat the above steps to add more clients.

> ***NOTE:*** *You can also search for clients linked to a particular provider and opportunity using the* ***Opportunity*** *search link.*

8. When you have added the clients who attended the group session, click the **continue** button to display the **New Group Session Step 4 of 4** dialog.
9. Select activities that describe the group session.
10. If required, add **Group Session Description** notes.

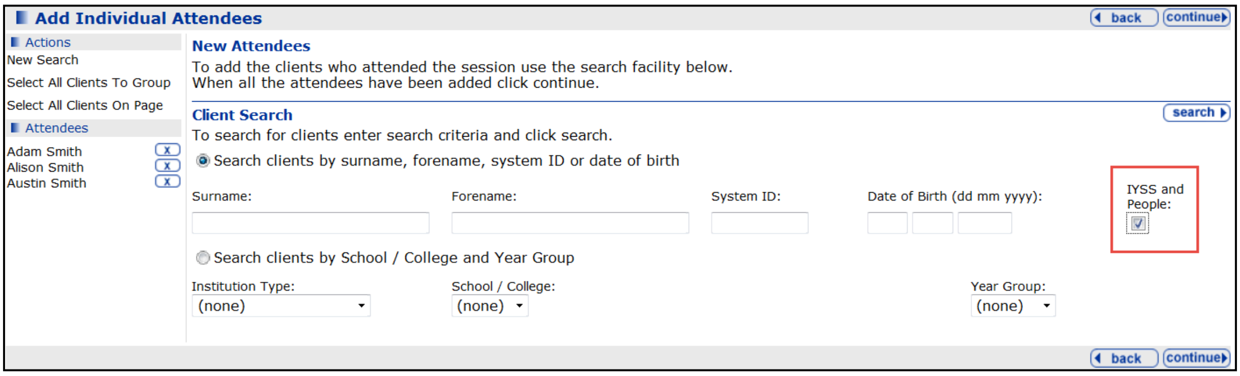


11. When you have completed adding the group session, click the **continue** button to return to **My Homepage**.

Converting Attendees to IYSS records

Only IYSS records can be added as attendees. However, you can convert existing One person records into IYSS records during the search for attendees to add to a session.

1. When you add attendees, select the **IYSS and People** check box in the **Client Search** panel of the **Add Individual Attendees** page.



2. Click the **continue** button to display the search results.
3. For non-IYSS client records, click the **convert** button to convert a One client record to an IYSS record:

> ***NOTE:*** *Conversion to an IYSS record cannot take place unless a date of birth has been entered in the person record.*

After the conversion has taken place, OneIYSS returns to the search results where the converted clients are available for you to add to the group.

Converting One Clients to IYSS

There are two ways to convert a One client to IYSS, which you can access from the **IYSS Links** panel on **My Homepage**:

- **IYSS Client Convert – Standard**. This is the usual process for manually converting a One client to IYSS.

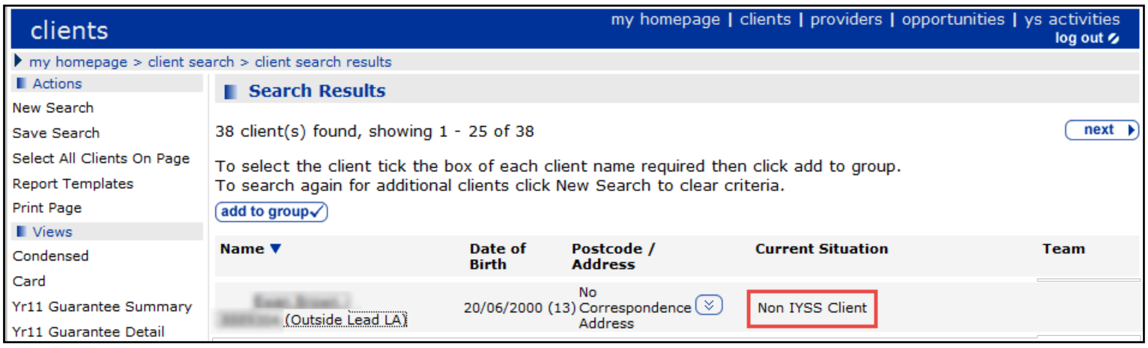
- **IYSS Client Convert – Simple**. This process enables you to convert a One client but requires less data than the standard method.

> ***NOTE:*** *The IYSS permissions are* ***IYSS Client Convert Standard*** *and* ***IYSS Client Convert Simple*** *respectively.*

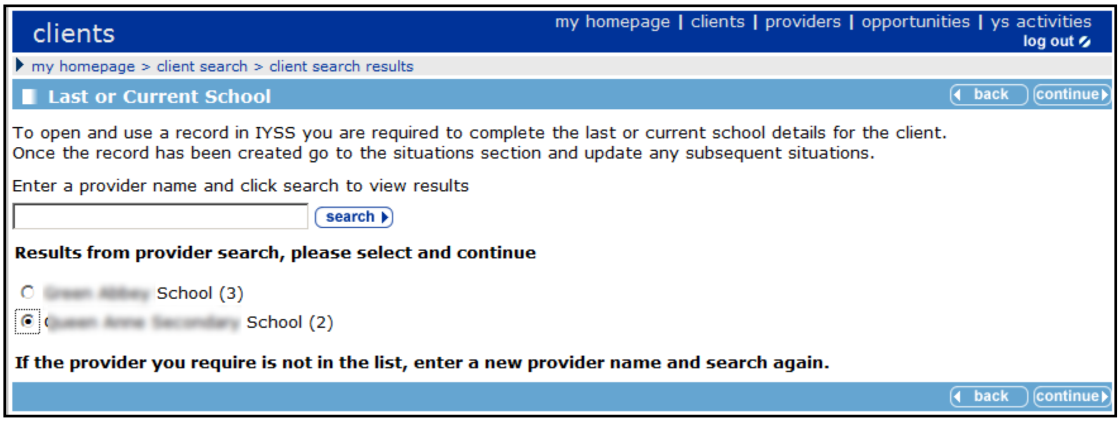
Converting to IYSS - Simple

To convert a One client to an IYSS client:

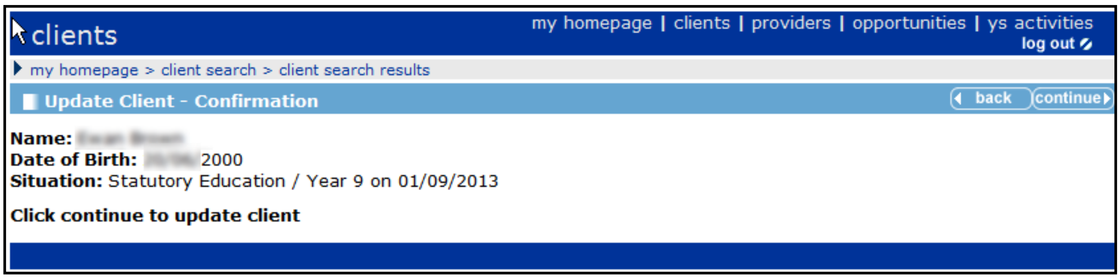
1. Search for clients you want to convert using **client search** from **my homepage** to display the **Search Results** dialog.



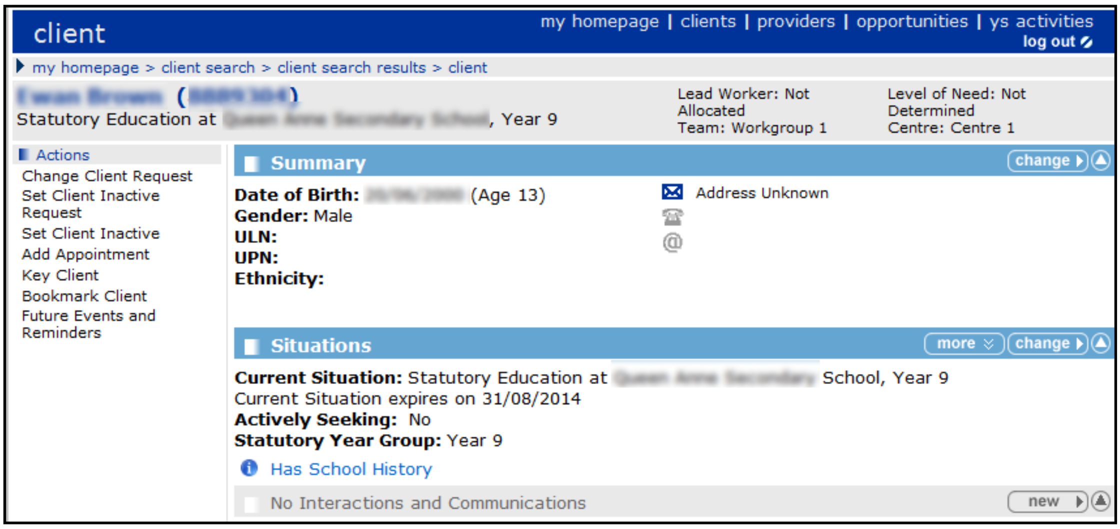
2. In the client **Search Results** dialog, click a client's **Name** which is marked as **Non IYSS Client** (in the **Current Situation** column) to display the **Last or Current School** dialog.



3. Search for the last or current school for the client by entering a name, then click the **search** button to display the search results.
4. Select a school from the list, then click the **continue** button to display the **Update Client – Confirmation** dialog.



OneIYSS calculates the statutory year group for the client using their DOB and creates a current situation of **Statutory Education up to Year 11** with the appropriate dates.

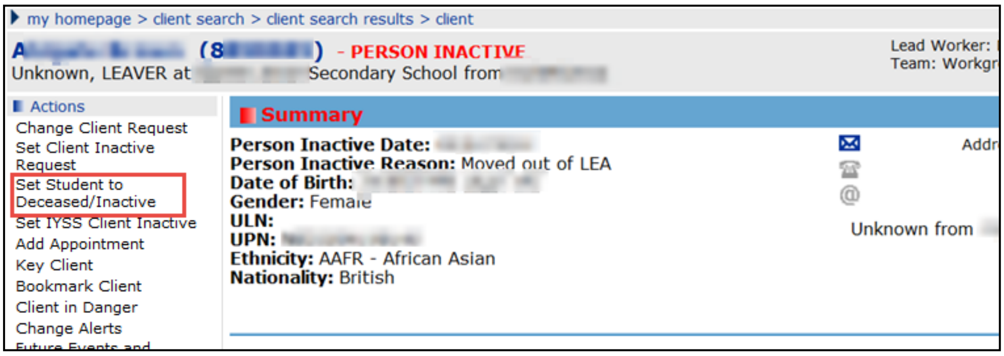


***NOTE:** The **Team** and **Centre** fields are populated automatically with your team and centre.*

Making a Client Inactive

If you have the appropriate permissions, you can make a client inactive. You can make multiple clients active or inactive at the same time using the **Group Actions** function explained in Adding a Client Group on page *10*.

1. Search for and open the required student's record.
2. Click the **Set Student to Deceased/Inactive** hyperlink in the **Actions** panel.



This makes the IYSS client record inactive automatically and you can enter the reason. If the reason you enter is **Deceased**, then the IYSS person record is also made inactive. You can only make a person record inactive if the reason is **Deceased**.

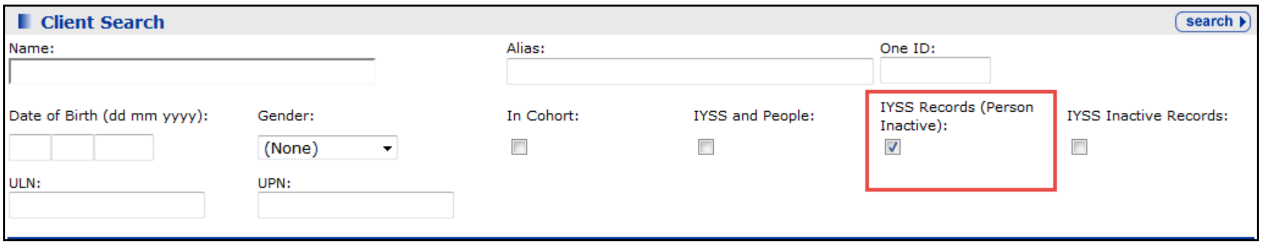
***NOTE:** Inactive people records with an active IYSS client record are displayed in searches automatically (no permission is required) and are highlighted on search results and on the individual record*

Searching IYSS records where the person is inactive

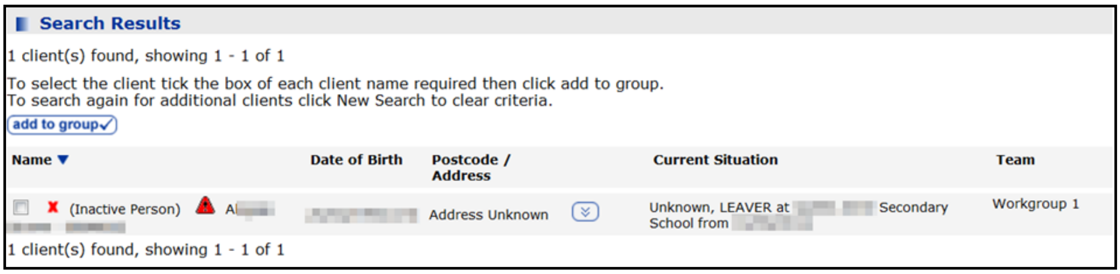
To search for inactive records and update the inactive information on the student/person, the following permissions in IYSS system administration are required:

- **Update Inactive/Deceased Person Details** (Client Add /Change/Delete)
- **Search Inactive People** (Client Search Criteria)

To search IYSS records where the person is inactive, select the **IYSS Records (Person Inactive)** check box in the **Client Search** screen:

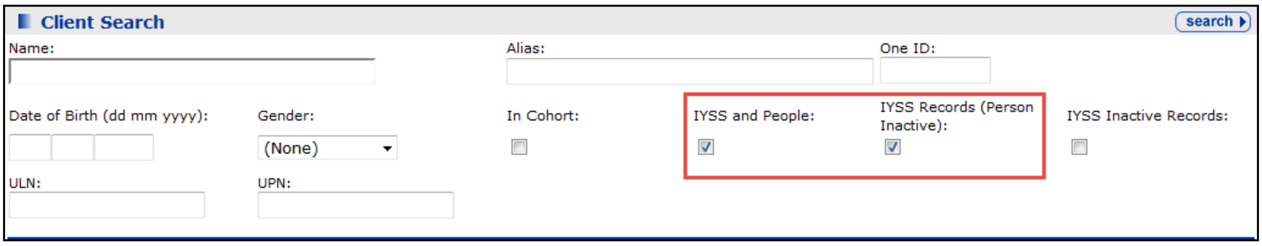


The following results are displayed:

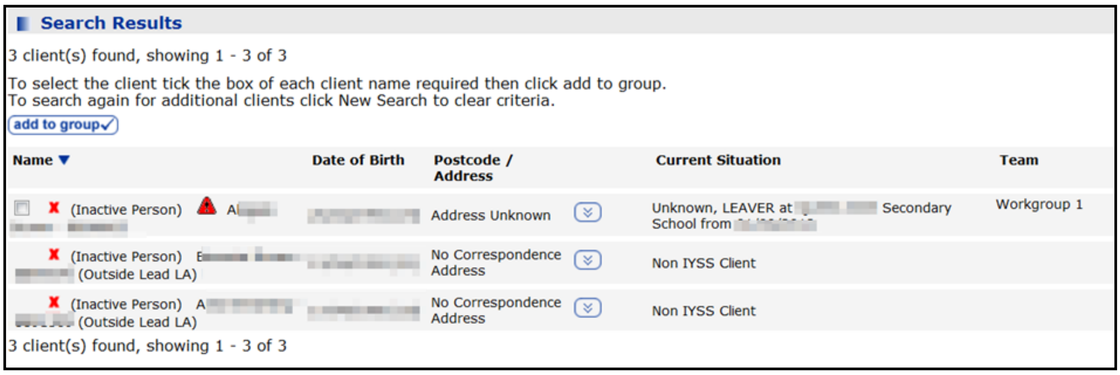


Searching for IYSS and One people records where the person is inactive

To search for IYSS and where the person is inactive, select the **IYSS and People** and **IYSS Records (Person Inactive)** check boxes:



This returns the following result:



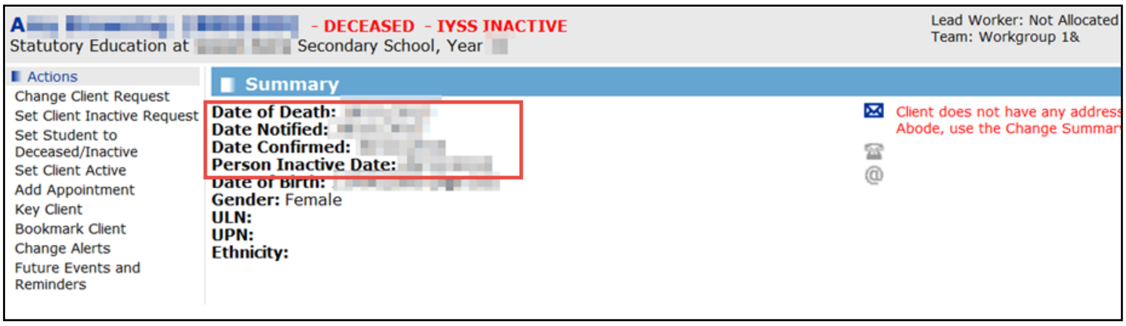
Changing Inactive details

You can update the inactive details by selecting the student and clicking the **Set Student to Deceased/Inactive** link to display the **Change Inactive Details** dialog.

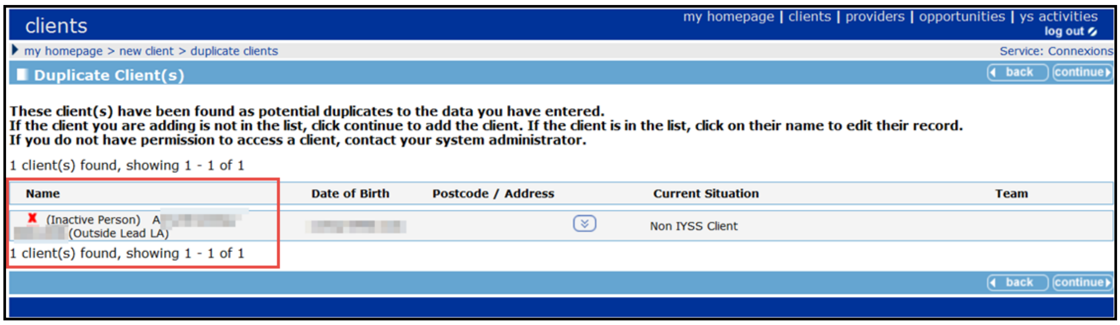
You can edit the following fields, if required:

- The **Active Student Details** check box.
- Enter an **Inactive Date**.
- Enter an **Inactive Reason**.
- Enter a **Notified Date** in the **Deceased Details** panel. This is mandatory if the inactive reason is **Deceased**. It cannot be in the future or earlier that the **Deceased Date**, and the person record must be inactive. Also, you must enter an **Inactive Date** and **Inactive Reason**.
- Enter a **Deceased Date**. This is mandatory if the **Inactive Reason** is **Deceased**, and it cannot be in the future.
- Enter a **Confirmed Date** in the **Deceased Details** panel. This is not mandatory but cannot be a future date, or earlier than the **Deceased Date** or **Notified Date**.

These details are displayed on the client's record as follows:



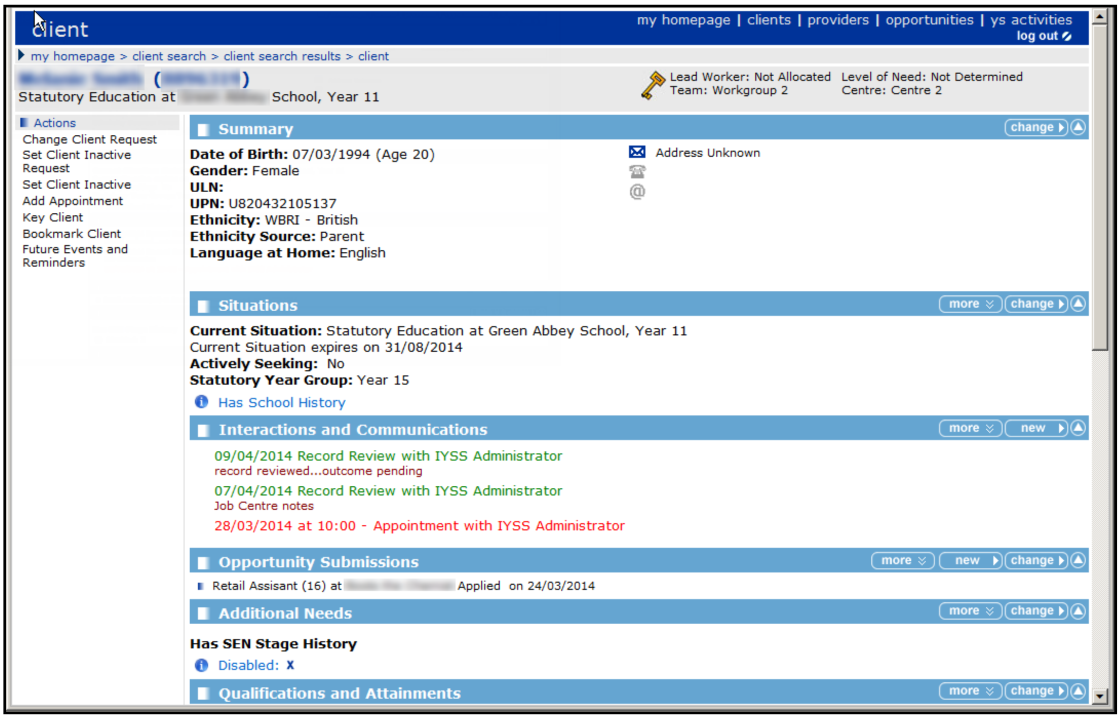
Additionally, the **Add New Client** function displays inactive records in search results. For more information see Adding a Client to IYSS on page *18*.



04 | The Client Record

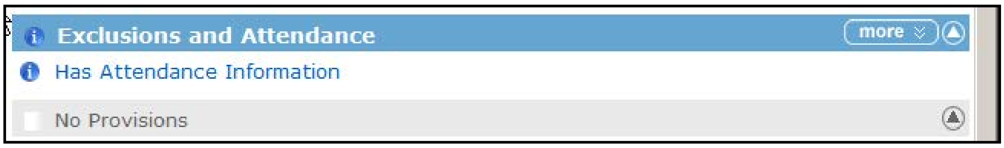
When you open a client record, it displays automatically in ‘less’ mode, i.e. only summary information is displayed for the different client sections.

The IYSS client record includes data from the core One young person record, e.g. school history, attendance and attainment data. Data that has been accessed from the young person’s core Capita One record, is shown with an information icon



Navigating around the client record

- Click the **more** button on a header bar to display the detailed information contained in the section.
- If there is no information entered in a section for a client, the section title bar and button are shown in grey, e.g. the **No Provisions** section in the record below:

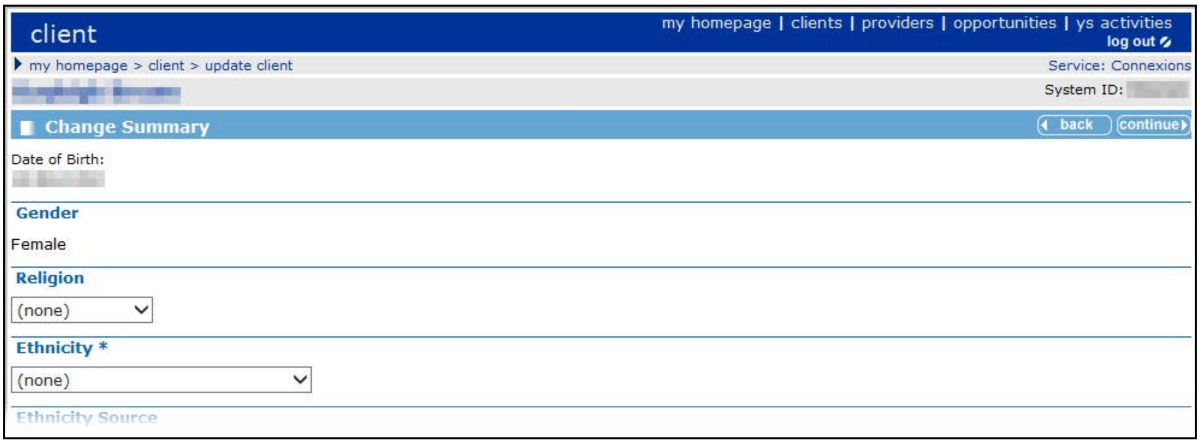


- Click the **top** button to return to the top of the client record.

Summary section

The **Summary** section displays the basic information held for the client, such as address, date of birth, etc.

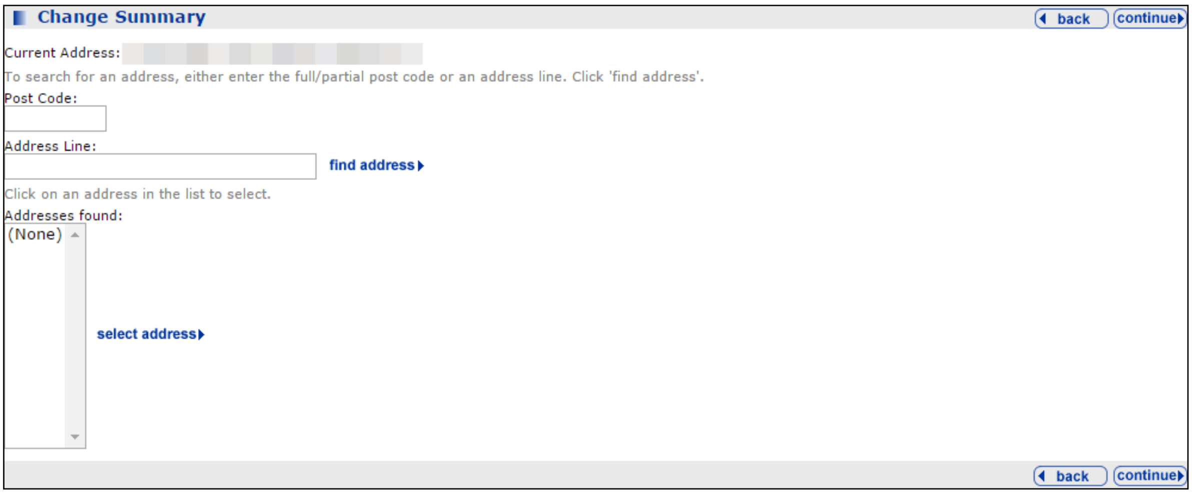
To amend or add information in this section, click the **change** button on the **Summary** section header bar to display the **Change Summary** screen.



Updating client summary information

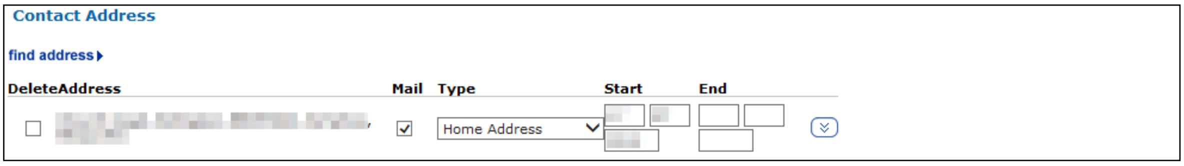
To amend or add information in the Client Summary section:

1. Click the change button on the Summary section header bar to display the Change Summary screen.
2. Enter a **Date of Birth** in the dd/mm/yyy format.
3. Select the appropriate **Gender**, **Religion**, **Ethnicity**, **Ethnicity Source**, and **LGBT** radio buttons (the **Gender** field is mandatory).
4. Enter the client's **Name**.
5. To add an alias, click the **new** button in the **Aliases** section to display the **Client Alias** page. Enter the required **Alias** and click the **continue** button.
6. To add a new **Contact Address**:
   a. Click the **new address** button to display a new Change Summary screen.



   b. Enter the Post Code or part of the Address Line (number and road name) in the new Change Summary screen.

c. Click the **continue** button to list the address under the **Contact Address** section.



d. Enter the **Start** date and select the address **Type** from the menu. If the address is to be used for written correspondence, select the **Mail** check box.

If this is the client's only address, **Home Address** must be selected from the **Type** menu and the **Mail** check box selected.

> ***NOTE:*** *If you are recording a change of address, ensure you deselect the* ***Mail*** *check box and enter an* ***End*** *date in the previous address entry.*

7. To mark a client as having no fixed or known address, click the **new** button in the **Address Unknown / No Fixed Abode**. Enter the relevant information in the **Address Unknown / No Fixed Abode** screen.

> ***NOTE:*** *When you change the address, details of previous address information is displayed by clicking the* ***more*** *button. If required, you can enter an alternative address (and an explanation for the alternative).*

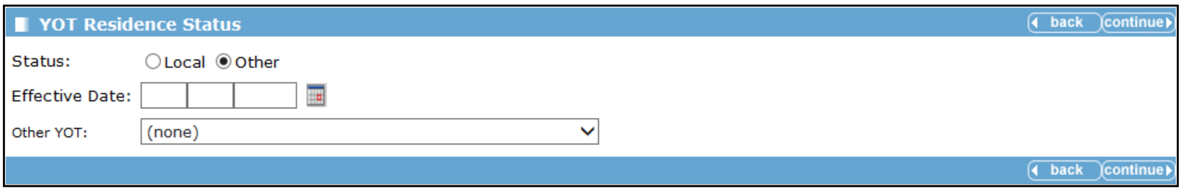
8. Enter the **Contact Details** for the young person.Select the **Preferred Contact** check box next to the number through which the client prefers to be reached. The email address and mobile number must be unique to the client. For more information about sending electronic messages to clients, see SMS and Email Messages on page *62*.
9. Select the relevant **Immigration Status** radio button.
10. If required, enter any **LAC Status Notes** in the text field.
11. If the appropriate YOT is not displayed in the **YOT Residence Status** panel:

a. Click the **new** button to display the **YOT Residence Status** panel.

b. Select the required **Status**.

c. If the **Status** is **Other**, select the required YOT from the **Other YOT** drop-down list.

d. Enter an **Effective Date**.



12. When you have completed the changes, click the **continue** button to save the changes and return to the client page.

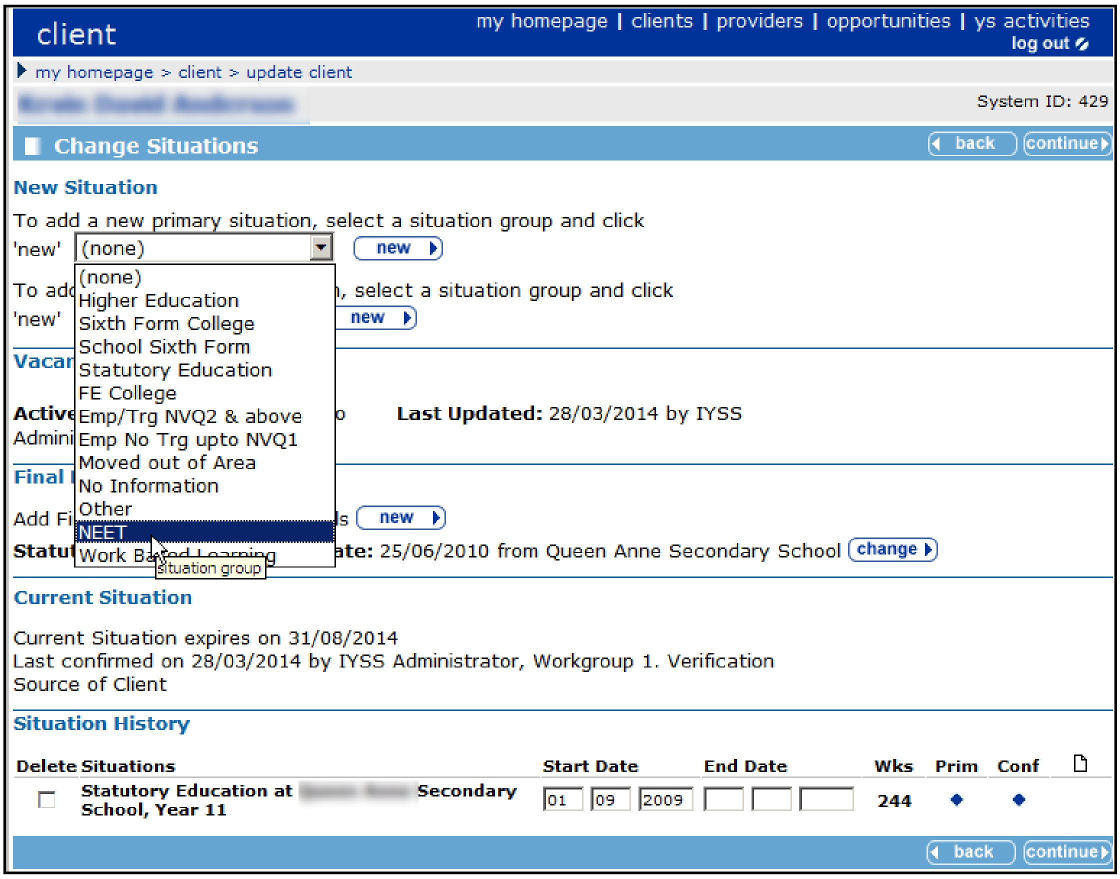
Situations section

Use the **Situations** section to amend and view information on the client's current education, employment or training status.

Adding an Unlinked Situation

This procedure shows how to add an unlinked situation to a client record, for instance if the client is in NEET in the example below:

1. In the client's record, go to the **Situations** section and click the **change** button to display the **Change Situations** dialog.

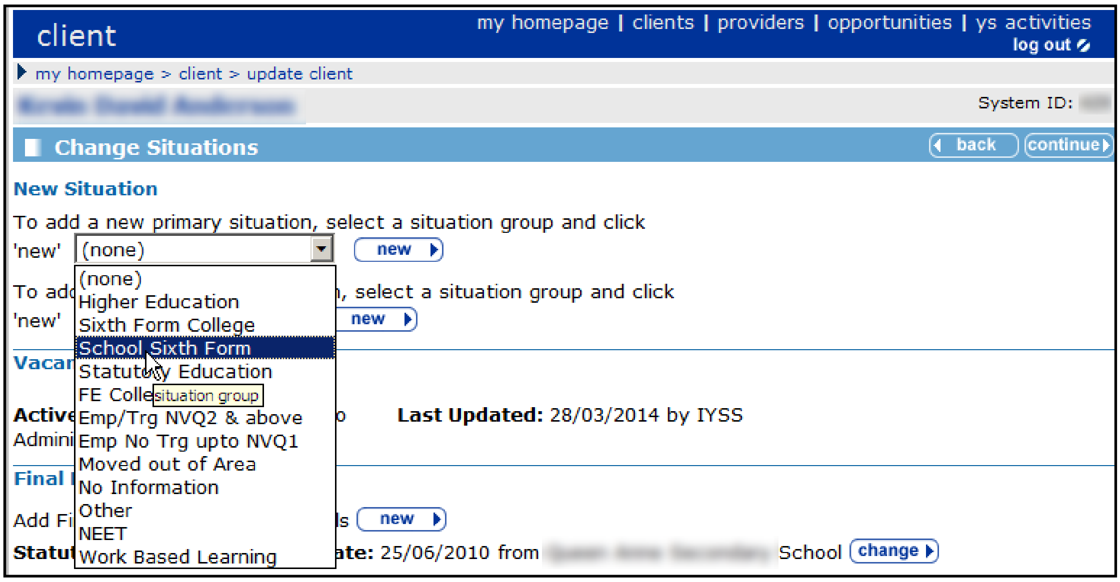


2. In the **new primary situation** drop-down list, select **NEET**. Then click the **new** button to display the **New Situation** dialog.
3. Select a **situation group/sub group** from the returned list. Enter a date and complete any other required fields.
4. Select the **continue** button to return to the **Change Situations** page.
5. Select the **continue** button to return to the **client** page.

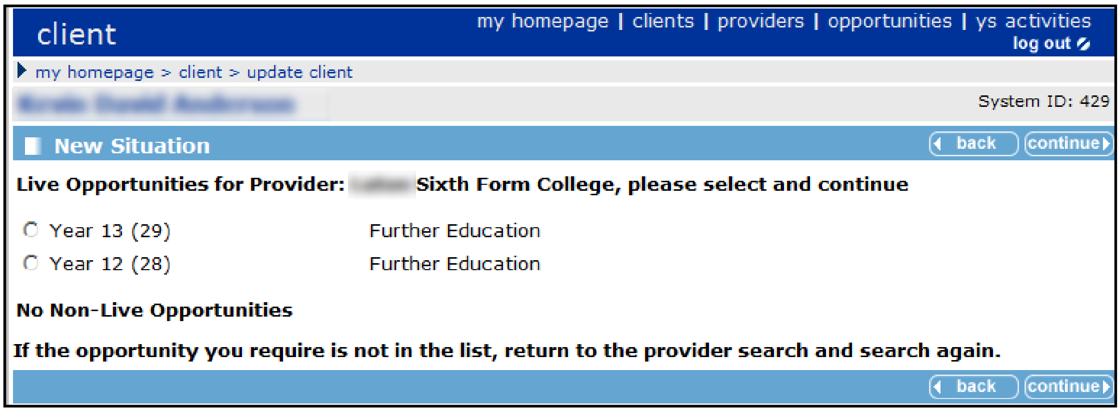
Adding a Linked Situation

This procedure shows how to add a situation linked to a provider and opportunity to a client's record, for example a school.

1. In the client's record, go to the **Situations** section and click the **change** button to display the **Change Situations** dialog.



2. In the **new primary situation** drop-down list, select **Sixth Form College** and click the **new** button to display the **New Situation** dialog.
3. Enter the client's sixth form education provider in the box provided and click the **search** button to display the search results.
4. From the search results, select the client's sixth form education provider and click the **continue** button to display the **New Situation** dialog.



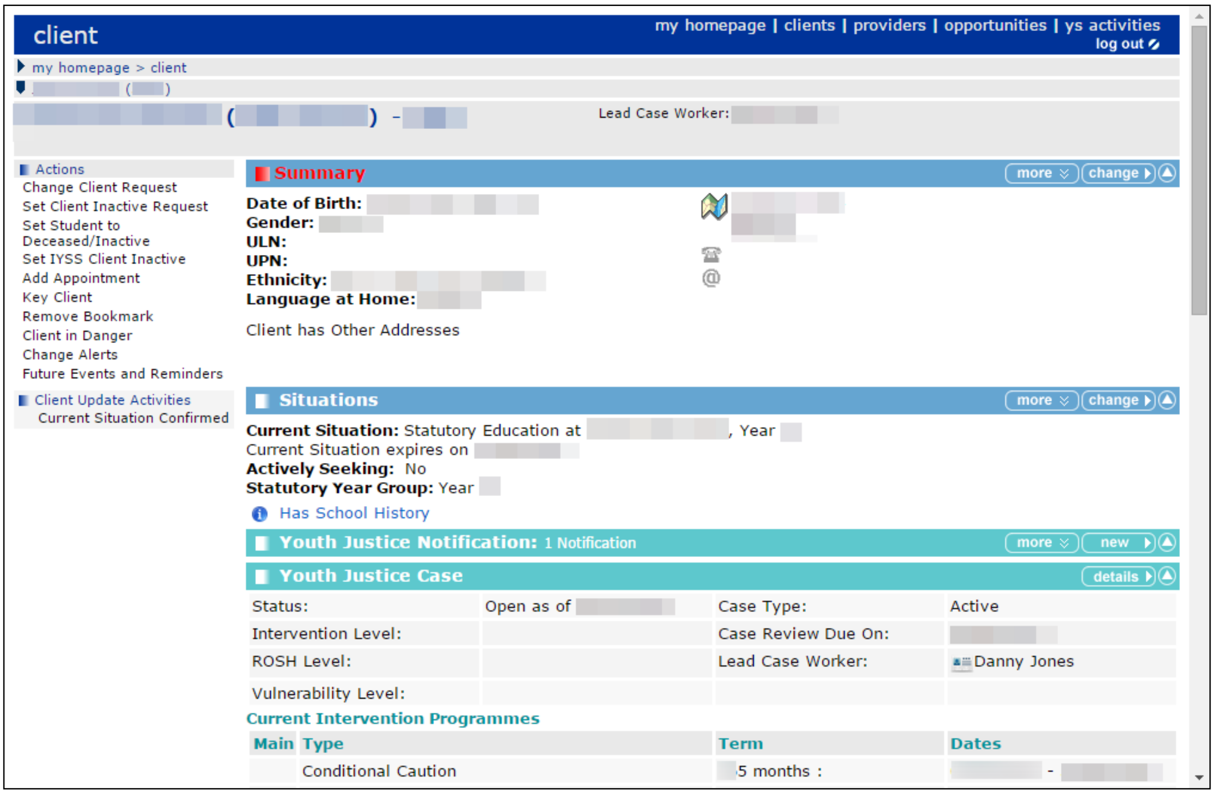
5. Select the client's current education year group and click the **continue** button.
6. Enter the start date of the **Situation** and **Course Level,** then click the **continue** button to display the **Change Situation** dialog.
7. In the **Change Situation** page, click the **continue** button to return to the client's record.

Editing ETE Status

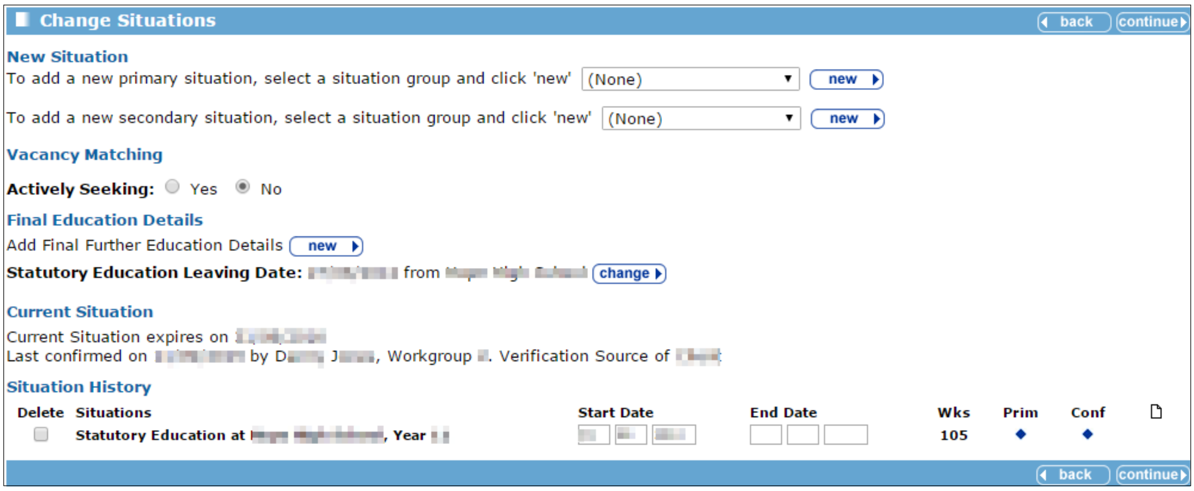
A client's current status in regard to education, training or employment (ETE) is displayed in the **Situations** panel in the **Summary** screen. The **Current Situation** has an expiry date, to encourage the monitoring of end of school year activity and changes. The ETE hours (the time a client spends in ETE activity) must be recorded.

To record the ETE hours:

1. Access the required client record.



2. In the **Situations** panel, click the **Change** button to display the **Situations** screen.



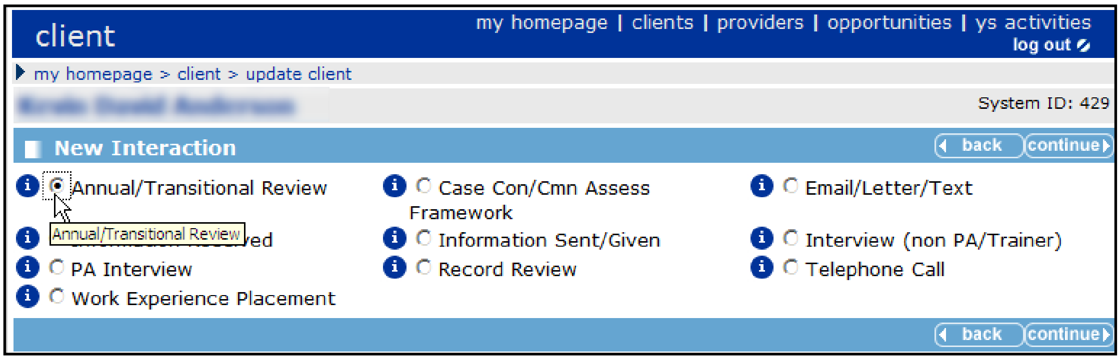
3. Click the relevant link in the **Situation History** section.
4. Enter the required information.
5. Click the **continue** button to save the information and return to the **Situations** screen.
6. Click the **continue** button to return to the **Summary** screen.
7. To return to the client record, click the **details** button in the **Youth Justice Case** panel.

Interactions and Simple Activities section

Adding Interactions and Simple Activities

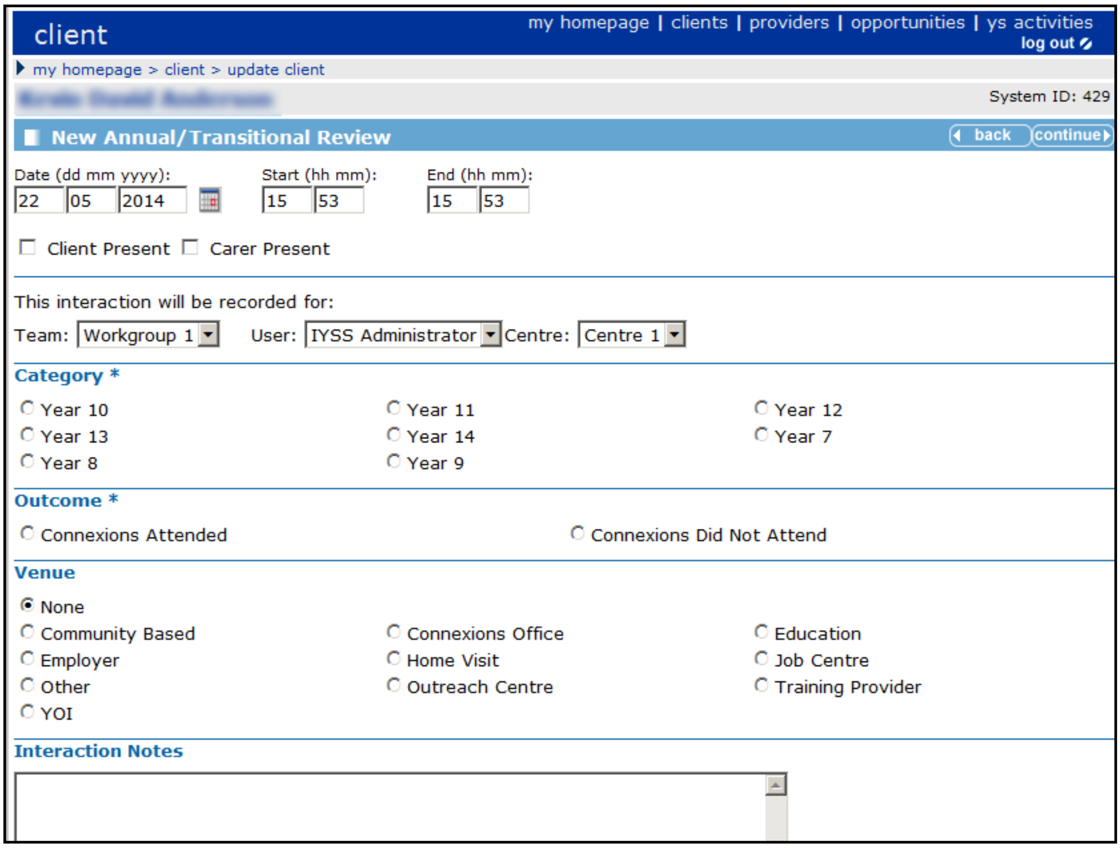
This procedure shows how to add an interaction and simple activities to the client record.

1. In the client's record, select the **new** button on the **Interactions and Communication** section to display the **New Interaction** dialog.



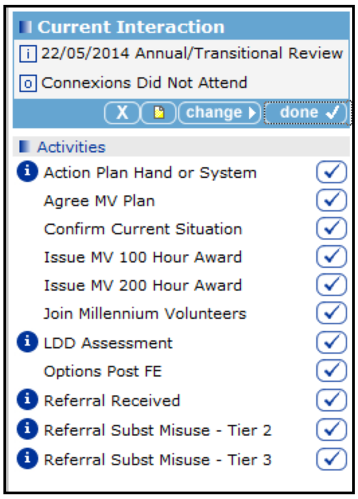
NOTE: *To display help text, hover over the information icon next to the interaction types.*

2. Select an **Interaction Type** and click the **continue** button to display the relevant interaction dialog, e.g. **New Annual/Transactional Review** dialog.



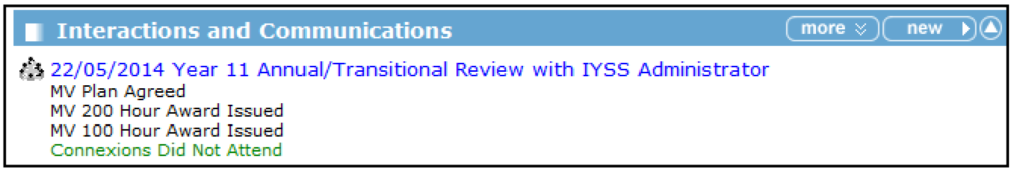
3. Enter a **Date** and time or leave as ‘today’.
4. Select a **Category**, an **Outcome** and a **Venue.** You can enter **Interaction Notes** now or later if you want.

5. Click the **continue** button to display the **client** page. In the panel on the left side of the dialog, the interaction you have just added is displayed in the **Current Interaction** panel.



This screenshot also shows examples of activities that you can associate with this interaction in the **Activities** panel.

6. Select activities from the list of **Activities** to add them to the interaction by clicking the **tick** button.
7. Click the **notes** button on the **Current Interaction** panel to enter free text notes, (if you have not already added some notes earlier).
8. Click the **continue** button to return to the **Current Interaction** panel.
9. Once you have completed this interaction, save it by clicking the **done** button. The interaction is displayed in the **Interactions and Communications** section of the client record.

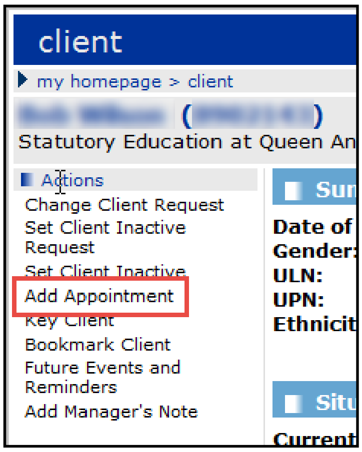


Appointments section

Adding an appointment to a client record

To add an appointment to a client record:

1. In the client's record, select the **Add Appointment** in the side **Actions** panel.



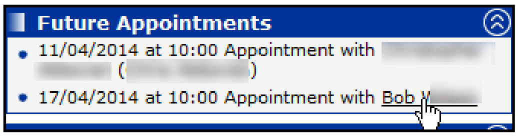
2. Enter the **Date** and **Time** and any other details required. Click the **continue** button to return to the **client** page.
3. The appointment is displayed in green in the **Interactions and Communications** section of the client's record:

The appointment is also displayed in **My Homepage** on the **Future Appointments** panel.

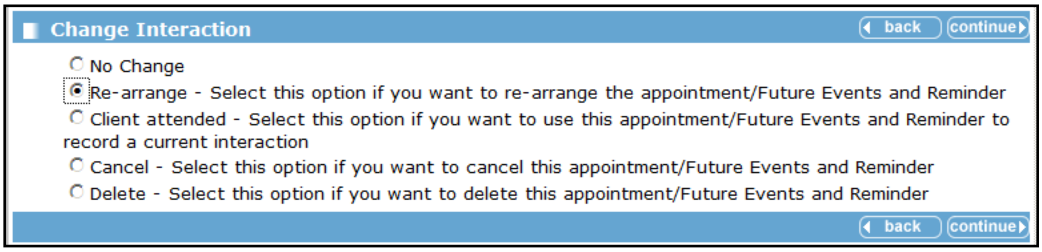
Updating an Appointment

This procedure shows how to update an appointment, for example to re-arrange an appointment or to create a new interaction.

1. In your **Missed Appointments** or **Future Appointments** panel on **My Homepage,** click on the client name to display the client's record.



2. Look for the appointment in the **Interactions and Communications** section in the client's record.
3. Open the interaction and select the required option.



Select **Client attended** if you want to record a new interaction, e.g. telephone call, for this appointment.

4. Click the **continue** button to return to the **client** page.

NOTE: *You can generate an automatic SMS when you book an appointment for a young person. The message goes out the day before the appointment date. You only get this option if a mobile number is recorded in the young person's record.*

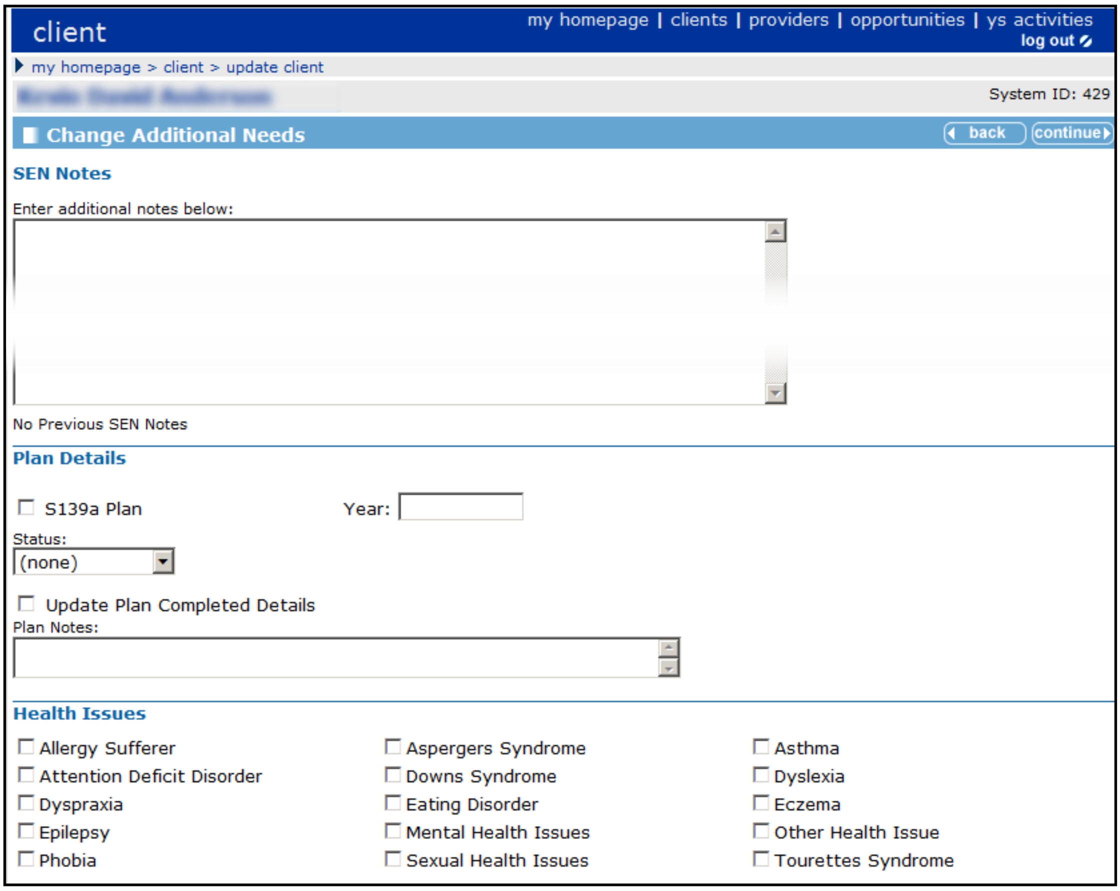
Additional Needs section

Updating a client's additional needs

> ***NOTES:*** *Recording and regularly updating a client's additional needs is important to make sure the client receives the support they require.*
>
> *SEN stage history and disability information is pulled through from One v4 and is read-only in IYSS.*

This procedure shows how to add or update a client's additional needs.

1. In the client's record, click the **change** button on the **Additional Needs** section to display the **Change Additional Needs** dialog.



2. Additional information can be added to the record in the **SEN Notes** section. These notes will also be available through the **Documents, Notes and Assessments** section.
3. Enter all the details relating to the client's additional needs.
4. Click the **continue** button to return to the client's record.

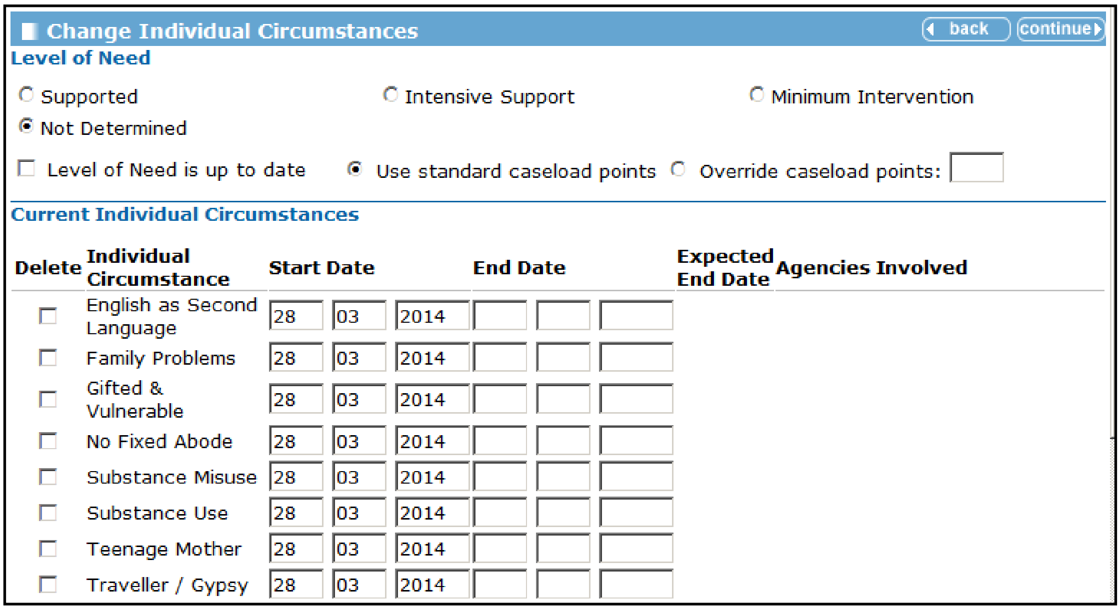
Individual Circumstances section

Recording individual circumstances logs important issues for the young person. They also form an important part of reporting to government and can affect funding.

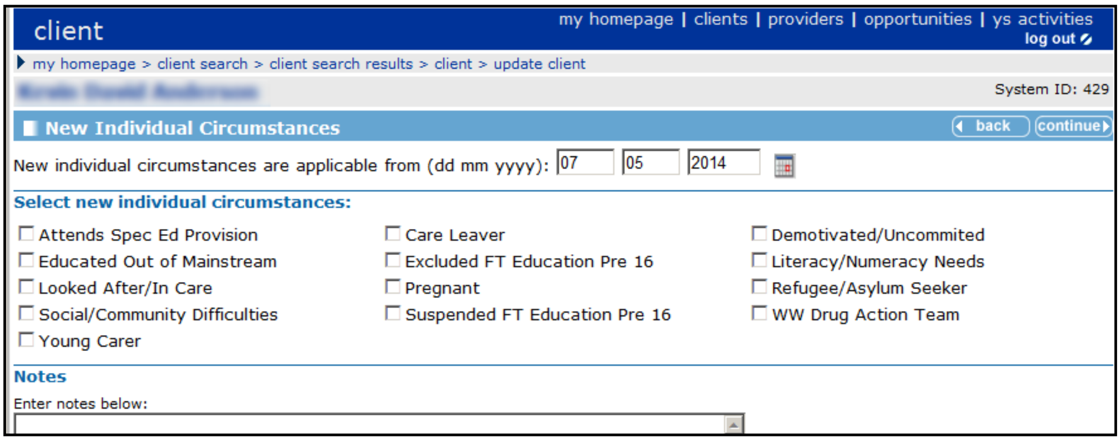
Updating a client's individual circumstances

To update individual circumstances:

1. In the client's record, click the **change** button on the **Individual Circumstances** section to display the **Change Individual Circumstances** dialog.



4. Complete the **Level of Needs** panel.
5. To add new circumstances, click the **add new individual circumstances** link to display the **New Individual Circumstances** dialog.



NOTE: *The above dialog is where issues that may affect a young person's progress are recorded.*

6. Select one or more individual circumstances.
7. Add personal **Notes** to support the new individual circumstances (these notes can also be viewed and updated from the **Document, Notes or Assessment** section of the client's record – for more information see Document, Notes and Assessments section on page *49*).
8. Click the **continue** button to return to the **Individual Circumstances** dialog.

9. Change the **Level of Need** if appropriate.

> ***NOTE:*** *If you do not change the level of need but add individual circumstances you need to check that the* ***level of need*** *is up-to-date.*

10. Click the **continue** button to return to the client record page.

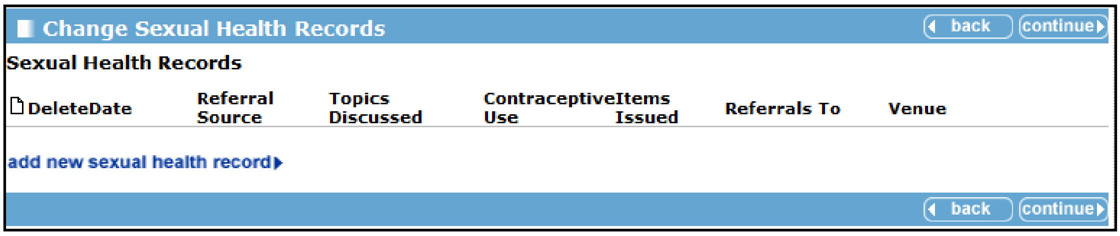
Sexual Health section

The **Sexual Health** section is used to identify sexual health advice, referrals and products given. Due to the sensitive nature of this information, the section is not visible to all staff. Permissions to use the Sexual Health section are granted in the OneIYSS System Administration module.

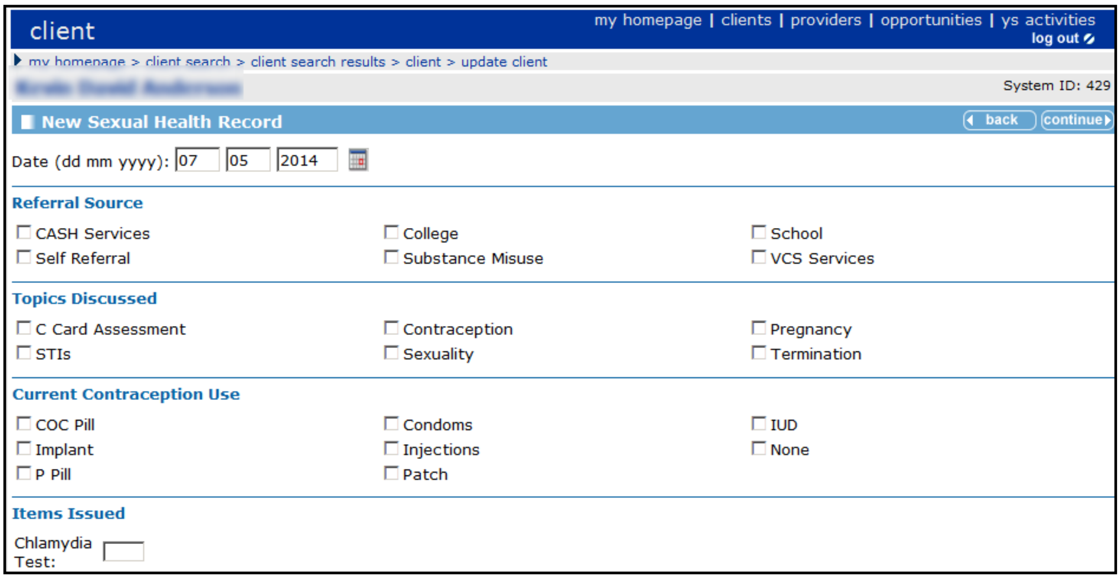
Adding a Sexual Health Session

To add a sexual health session:

1. In the client's record, click the **change** button on the **Sexual Health** section to display the **Change Sexual Health Records** dialog. This dialog lists any previous sexual health records.



2. Click the **add new sexual health record** link to display the **New Sexual Health Record** dialog.



3. Enter all details relating to the sexual health session.

> ***NOTE:*** *The* ***Items Issued*** *section allows you to specify the number of items issued.*

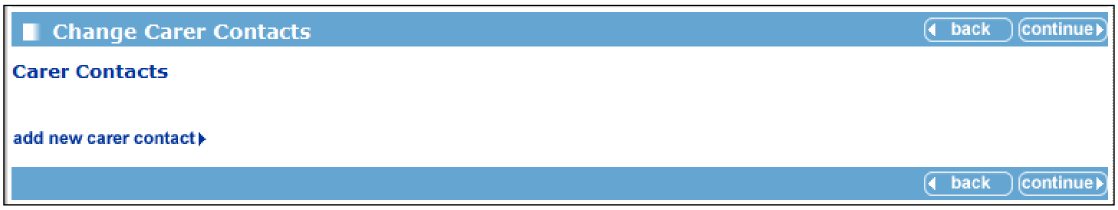
4. Click the **continue** button to display the **Change Sexual Health Records** dialog.
5. Click the **continue** button to return to the client record page.

Carer Contacts section

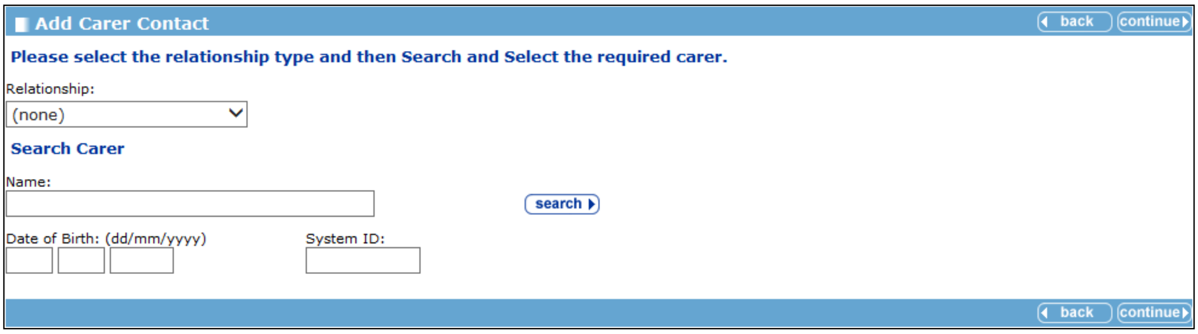
Use the **Carer Contacts** section to record parent/guardian contact details and make notes about family relationships. This may be particularly important if the young person is part of more than one family.

To add a personal/family contact:

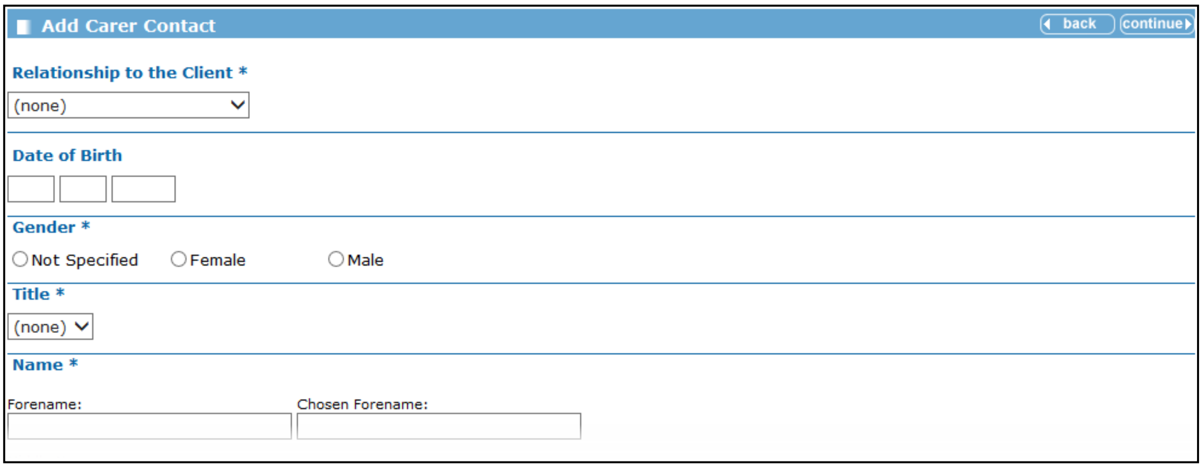
1. In the client's record, click the **change** button on the **Carer Contacts** section to display the **Change Carer Contacts** dialog.



2. Click the **add new carer contact** link to display the **Add Carer Contact** screen.

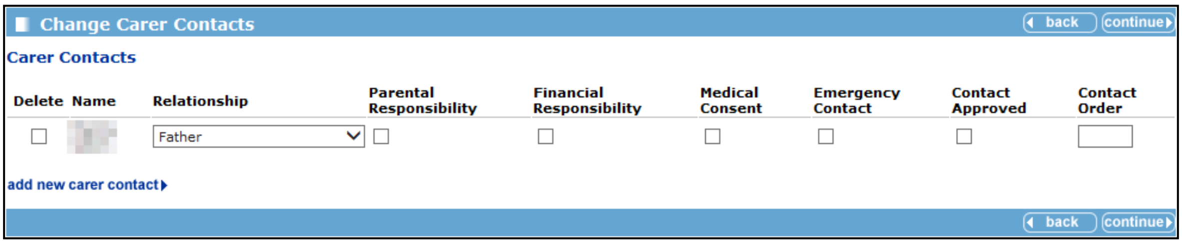


3. Search for an existing carer contact record:
   a. Select a **Relationship** type, e.g. Father, from the drop down.
   b. Enter the carer's name and click the **search** button to display a list of matching records.
   c. If the required carer is displayed in the results, select the record and click the **continue** button to save the carer record and display the **Change Carer Contacts** screen.
   d. If the required carer is not displayed in the results:
      i. Click the **add new carer contact** link to display the Add Carer Contact screen.



      ii. Complete the required fields.
      iii. Click the **continue** button to save the carer record and display the **Change Carer Contacts** screen.

4. Select the checkboxes as appropriate.



5. If required, complete the **Contact Order** field. This indicates the order in which the carers should be contacted, where “1” is the first person to contact.
6. Click the **continue** button to return to the client record.

Notes section

Notes are recorded as part of an interaction and give a general description of what was discussed as part of the contact.

It is important to keep notes of a particular type together so that anyone coming into contact with the young person can immediately get to the appropriate information.

The three main areas for adding notes in this section are:

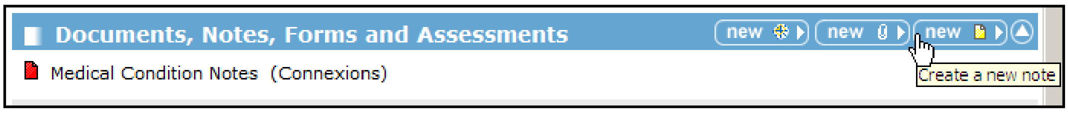
- **SEN Notes** and **Personal Notes** are displayed in red as they are classed as confidential and may be restricted as part of role-based security.
- **Benefit Notes** are not classed as confidential and are displayed in yellow.

More Information:

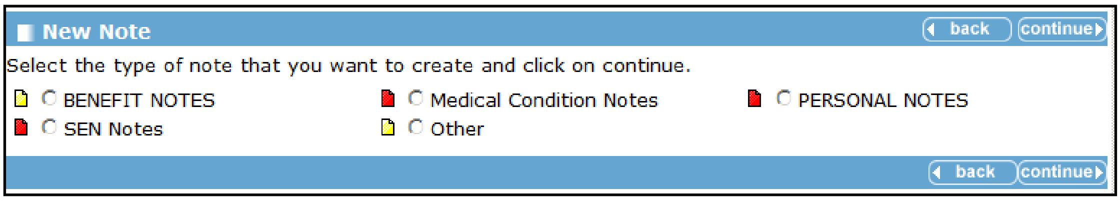
Document, Notes and Assessments section on page *49*

Adding a New Note:

To add a note to a client record:



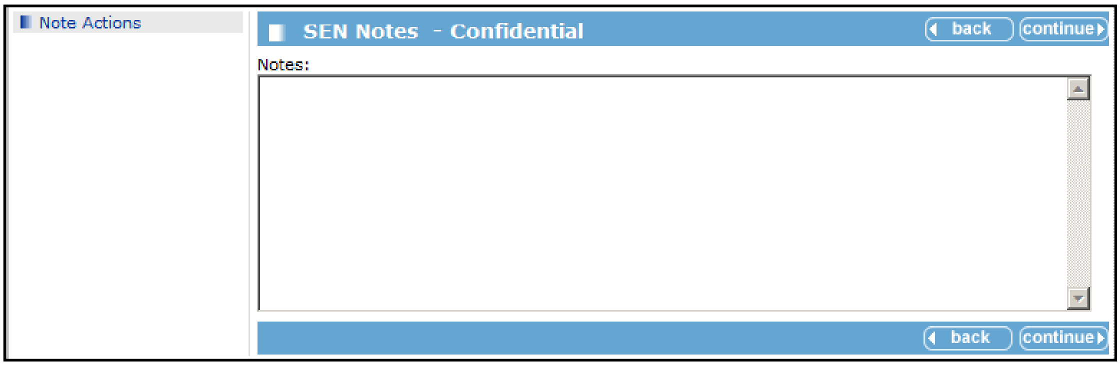
1. In the client's record, click the **new note** button on the **Documents, Notes, Forms and Assessments** section to display the **New Note** dialog.



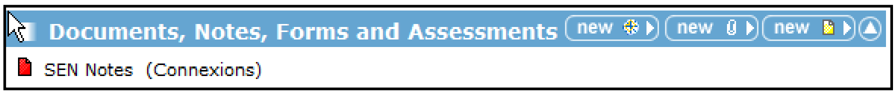
2. Select the required note (if a note of this type already exists it is opened automatically).

NOTE: *Note types with a red icon can only be read by users with appropriate permission. Notes with a yellow icon can be read by all users.*

3. Click the **continue** button to display the relevant **Notes** dialog.



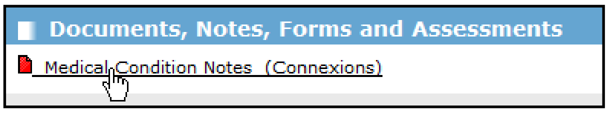
4. Enter your notes. Dates and names are added automatically).
5. Click the **continue** button to return to the client record. Your note is displayed in the **Documents, Notes, Forms and Assessments** section.



Viewing and Change a Note

To change a note on a client record:

1. In the client's record, click the note you wish to change in the **Documents, Notes, Forms and Assessments** section.



2. Click the note title you want to view/change.
3. You can now read the notes and make changes if required.
4. Click the **change** button in the left side panel under **Note Actions**.
5. Enter your notes.
6. Click the **continue** button to return to the client record.

You can access running notes from other locations in OneIYSS e.g. **Additional Needs (SEN Notes)** and **Individual Circumstances (Personal Notes)**. These form part of the same notes accessed in **Documents, Notes, Forms and Assessments**, but are accessed from a different area in the client record.

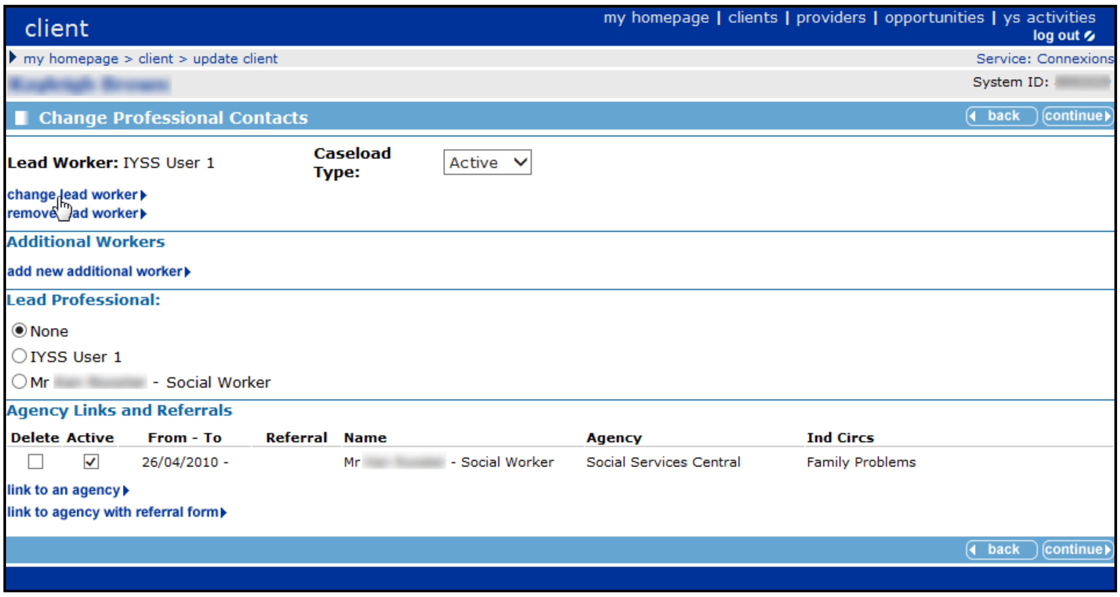
Professional Contacts and Involvements section

Adding a Lead Worker or Additional Worker

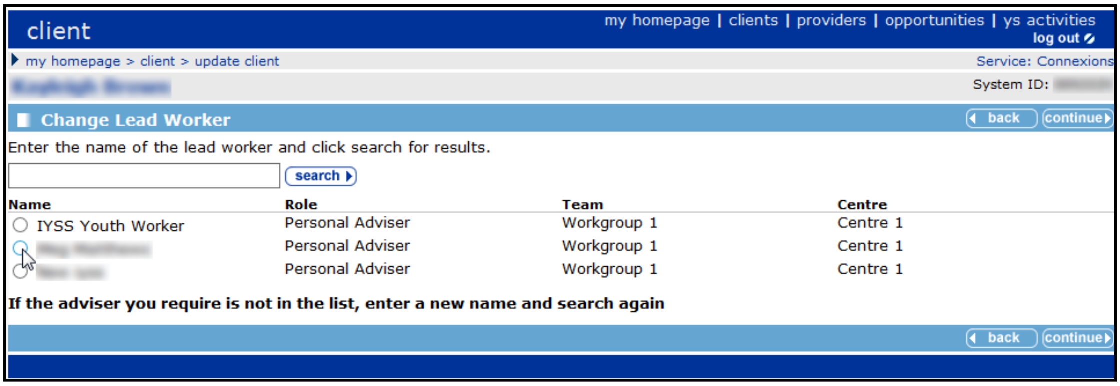
To add the lead worker or add a new additional worker:

> ***NOTE:*** *The example in the following process will add a lead worker. However, you can add an additional worker using the same process, but by clicking the* ***add new additional worker*** *link.*

1. In the client's record, click the **change** button in the **Professional Contacts and Involvements** section to display the **Change Professional Contacts** dialog.



2. Click the **change lead worker** link to display the **Change Lead Worker** dialog.
3. Enter a name, forename or surname, and click the **search** button to display the search results.



4. Select the name you want and click the **continue** button to display the **Change Professional Contacts** dialog (now updated to show one or more names in the **Lead Professional** section).
5. From the names in the **Lead Professional** section, select the new **Lead Worker's** name and click the **continue** button to display the client record.

   The new **Lead Worker** is displayed on the client record. The change is recorded in the history of changes.

Adding a Lead Professional

Only a few young people are allocated a **Lead Professional**. In OneIYSS, the **Lead Professional** can be selected from either **Lead Worker** or a recorded **Agency Contact**.

1. In the client's record, click the **change** button in the **Professional Contacts and Involvements** section to display the **Change Professional Contacts** dialog.
2. Select the **Lead Professional** from the list. If the person you require is <u>not</u> in the list, you need to add them as an **Agency Contact** first.

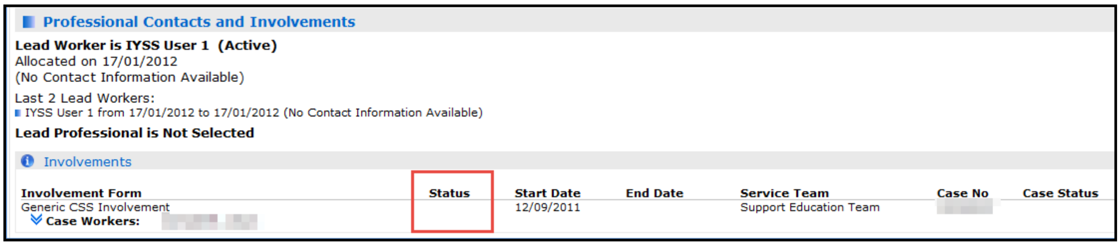
NOTE: *Adding agency contacts is a system administrator function. For more information about the permissions required, see* OneIYSS System Administration Handbook.

Viewing One Involvements

In One, an involvement is linked to a student who may also be a client in OneIYSS. If a client has involvements in One, the message 'Has Involvements' is displayed in the **Professional Contact and Involvements** panel.

To show the involvement details, click the **More** button. The details that are displayed depend on whether you (as an IYSS user) are a member of the One establishment for the service that the specific involvements are linked.

If you are not a member of the One Establishment, you will see the following details. You cannot to see the **Status** details:



If you are a member of the One establishment you will see the following details. You can see the **Status** details:

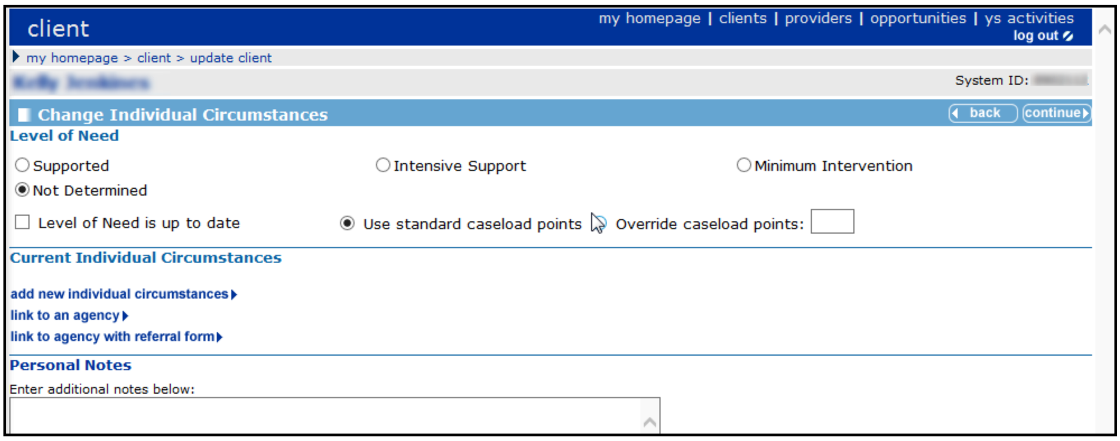
Agencies and Referrals

This procedure shows how to:

- link client to an agency, or
- record a referral to an agency.

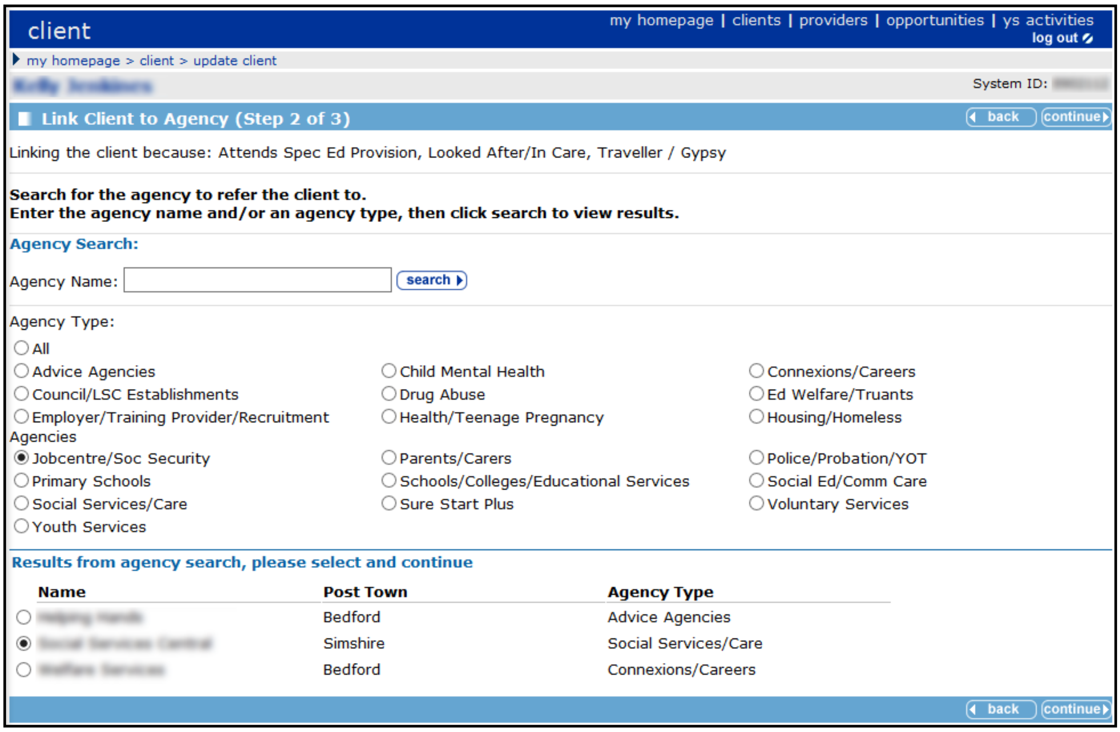
Both tasks follow the same procedure except **refer an agency** has a referral form to complete.

1. In the client's record, click the **change** button in the **Individual Circumstances** section to display the **Change Individual Circumstances** dialog.

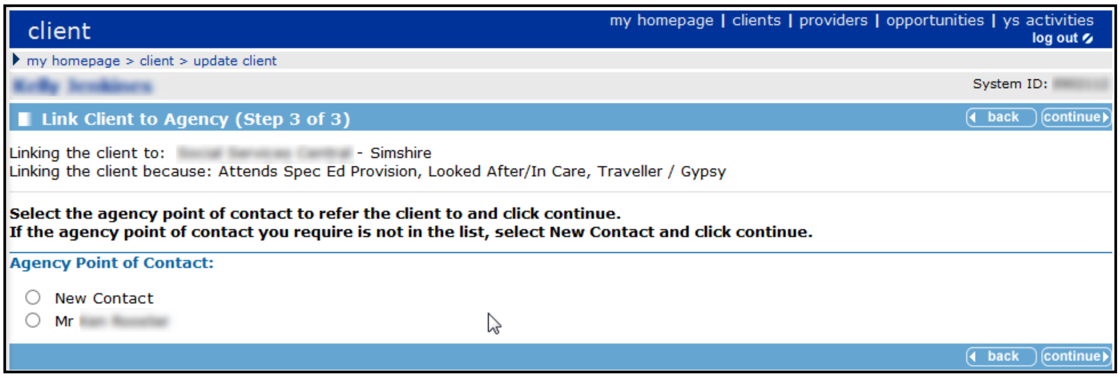


2. Click the **link to an agency** link to display the **Link Client to Agency (Step 1 of 3)** dialog.

3. Select either a current individual circumstance or new ones for which the referral is being made. Then enter any relevant **Notes**.
4. Click the **continue** button to display the **Link Client to Agency (Step 2 of 3)** dialog.
5. Enter an **Agency Name** in the search box and then click the **search** button to display the search results.



6. Select the **Agency Type** from the list.
7. Select the **Agency Name** from the agency search results.
8. Click the **continue** button to display **Link Client to Agency (Step 3 of 3)** dialog.



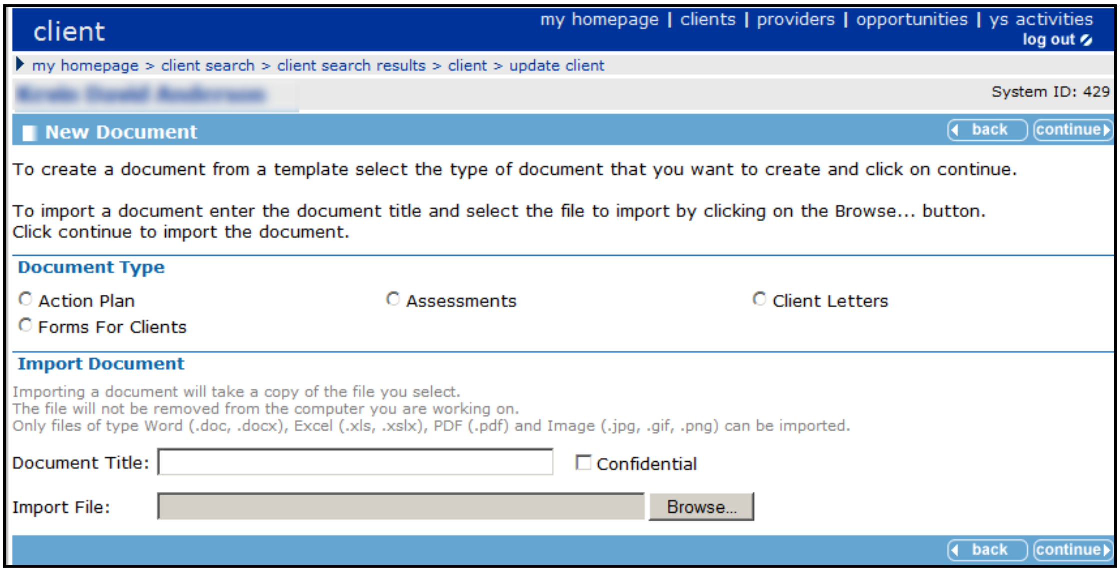
9. Select the **Agency Point of Contact** from the list. If the contact you require is <u>not</u> displayed, select **New Contact**.
10. Click the **continue** button to return to the **Change Individual Circumstances** dialog.
11. If you selected the referral option, complete the **Referral Details** by entering text in the text boxes and completing the date fields, then click the **continue** button.
12. Select the **continue** button to return to the **client** page.

Document, Notes and Assessments section

This procedure shows how to add a document to or change a document linked to a client record.

Adding a new Document

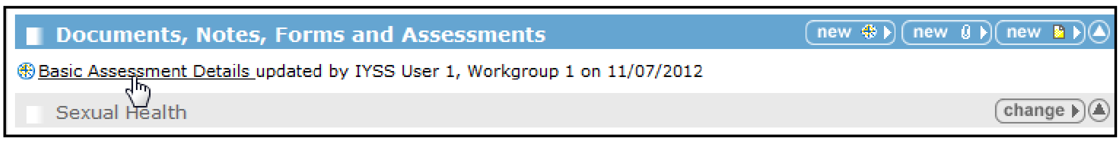
1. In the client's record, click the **new document** button in the **Document, Notes, Forms and Assessments** section to display the **New Document** dialog.



2. Select the **Document Type** that you want to create.
3. Click the **continue** button to display the **New [Document Type]** dialog.
4. Select the **Document Template** you want. Click the **continue** button to display the document template.
5. Enter a **Document Title** (this is displayed in the list in the **Document, Notes, Forms and Assessments** section of the client record page).
6. Click in the main document section to activate the tool bar.
7. Use the **Insert Client Information** links to add client information into your document.
8. Click in the document where you want the client information to appear.
9. Click on the client information link (e.g. full name) which is then displayed in the document.
10. Enter any other text required. Use the **spellchecker** button to check spelling.
    - If you are working on a long document and want to save it, click the **save** button.
    - To print the document, click the **print** button.
11. To return to the client page, click the **continue** button. Your document is displayed in the **Document, Notes, Forms and Assessments** section of the client's record.

Changing an existing Document:

1. In the client's record, in the **Document, Notes, Forms and Assessments** section, click the document name that you want to change to display the document



2. To change the document, click the **change** button on the left side panel under **Note Action**.
3. Make the required changes.
4. Click the **continue** button to return to the client page.

NOTE: *If you are working in a document for a while you can save it regularly by clicking* ***Save****.*

Importing a Document

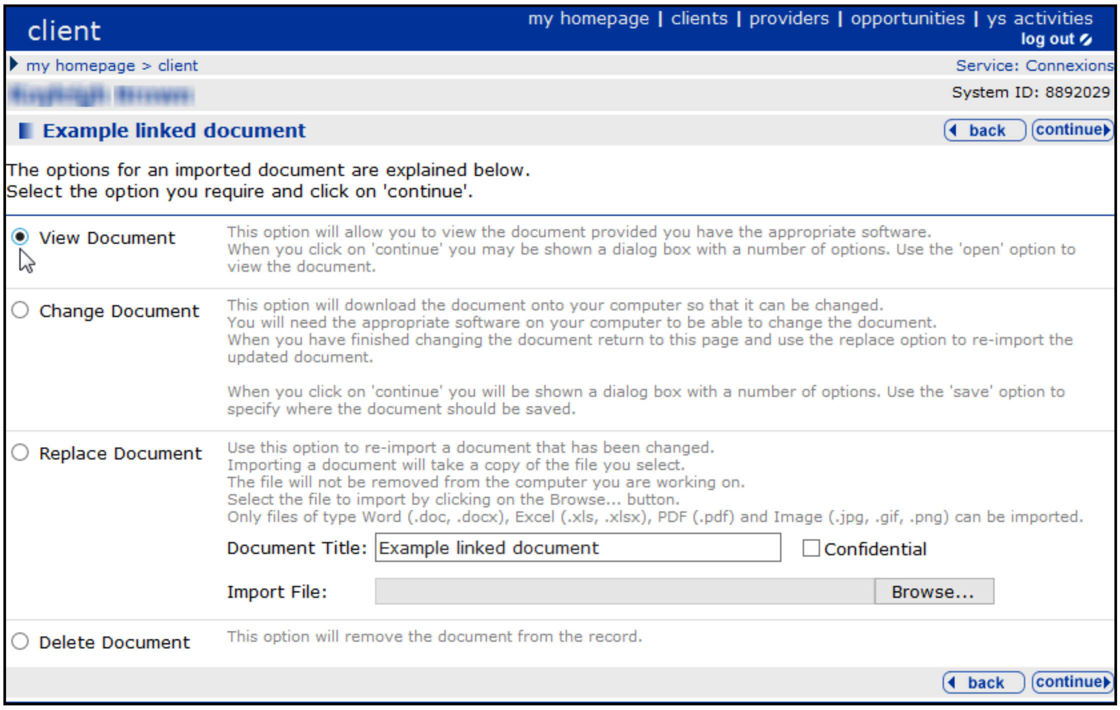
NOTE: *You can only import files of type Word (.doc, .docx), Excel (.xls, .xslx), PDF (.pdf) and Image (.jpg, .gif, .png).*

1. In the client's record, click the **new document** button in the **Document, Notes, Forms and Assessments** section to display the **New Document** dialog.
2. In the **Import Document** section of the dialog, enter a **Document Title** for the document you want to import.
3. Click the **Browse** button and select the document you want to import from the **Choose File to Upload** dialog.
4. Select the **Open** button to return to the **New Document** dialog.
5. Click the **continue** button to save the imported the file. The imported file is displayed in the **Document, Notes, Forms and Assessments** section.
6. Click the **continue** button to return to the client page.

Viewing an Imported Document

1. In the client's record, click the document name that you want to change in the **Document, Notes, Forms and Assessments** section.

   To view or change an imported document that is not a Word document, the dialog below is displayed.



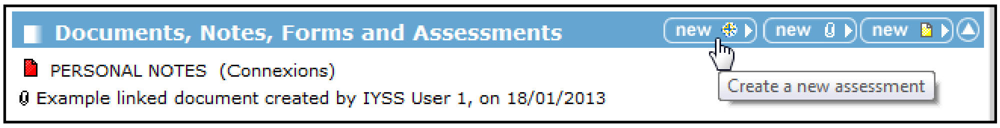
2. Select the option you want and follow the instructions on the dialog depending on whether you want to view, change, replace or delete the document.

3. Click the **continue** button to return to the client page.

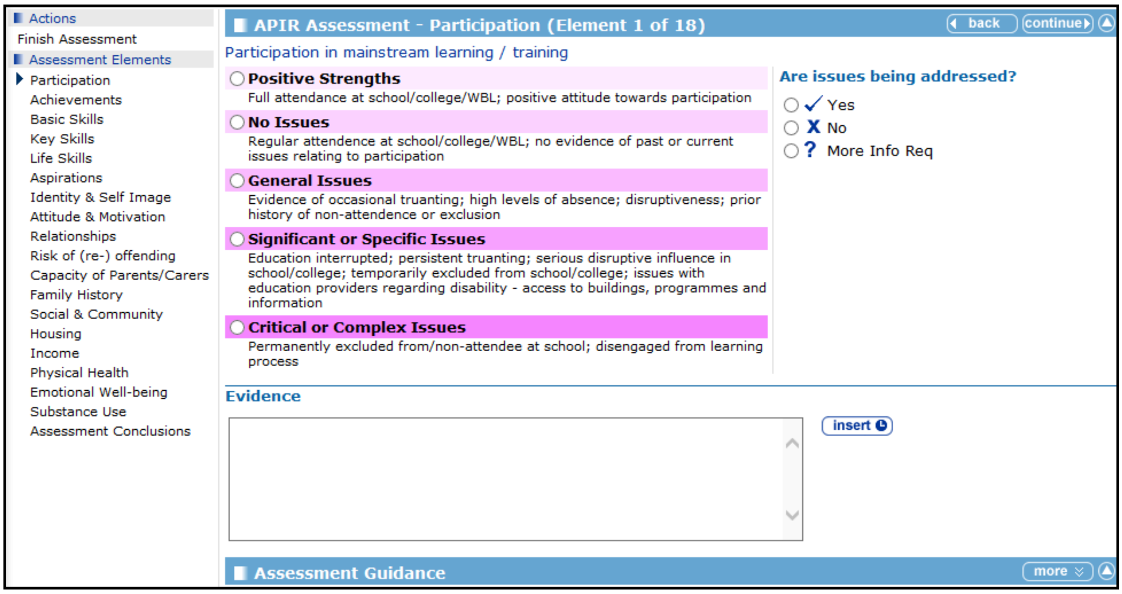
Adding an APIR to a Client Record

To add an APIR to a client record:

1. In the client's record, click the **new APIR** button in the **Document, Notes, Forms and Assessments** section to display the **Record New Assessment** dialog.



2. Select **APIR Assessment**. Click the **continue** button to display the **APIR Assessment - Participation (Element 1 of 18)** dialog.

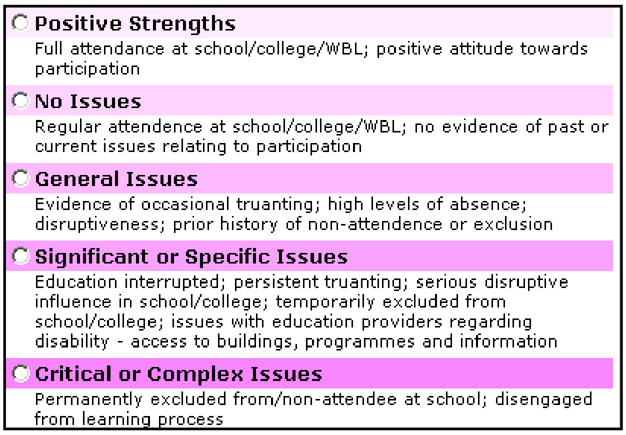


> ***NOTE:*** *You may find it beneficial to read through the rest of this section in the handbook before continuing.*

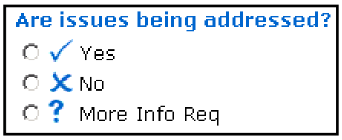
3. Either complete each element in turn by clicking the **continue** button to go to the next element, or select the element you want to record from the list in the side panel. As each element is recorded the value shows next to the element.

4. For each element you need to complete:

- **Level**

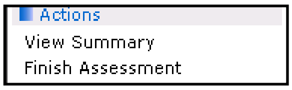


- **Are Issues Being Addressed**

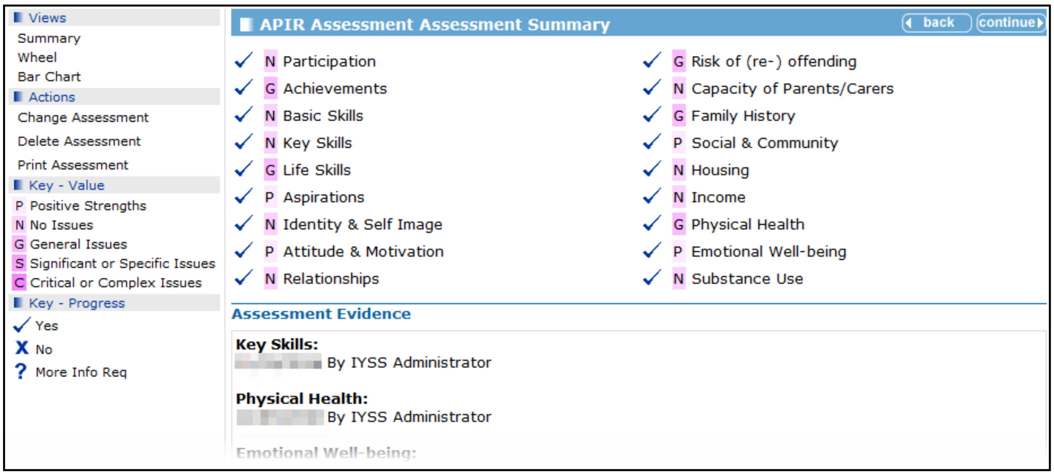


- Any relevant notes.
- To view the **Assessment Guidance** notes, click the **more** button.

5. When you have completed recording the assessment, click on **Finish Assessment** in the **Actions** side panel:

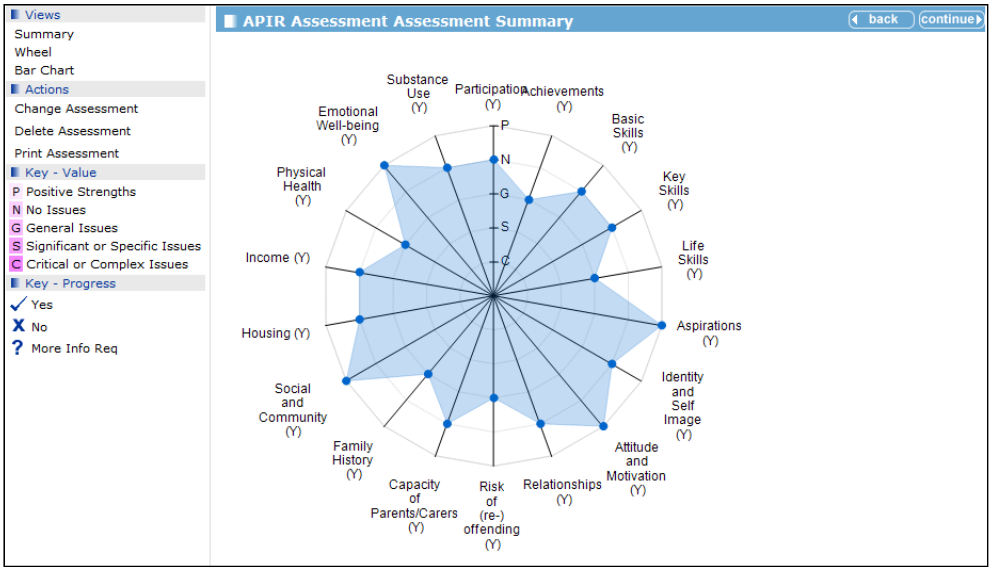


The **APIR Assessment Summary** is displayed which may look similar to this:

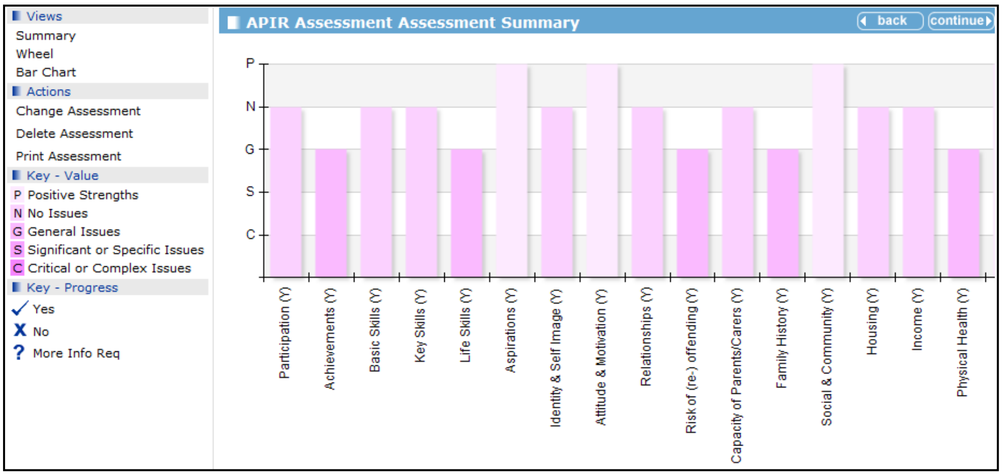


You can view the APIR assessment in **Wheel** or **Bar Chart** format by selecting the options under **Views** in the left hand panel:

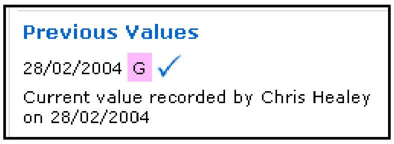
Example of the **Wheel** view:



Example of the **Bar Chart** view:



- Notes are displayed for all elements on each view.
- All elements have suggested issues to explore at the bottom of each page.
- When elements are changed the previous values are kept and displayed:



- From the **Summary**, **Wheel**, or **Bar Chart** view you then click the **continue** button to return to the client record.

Consent to Share Information section

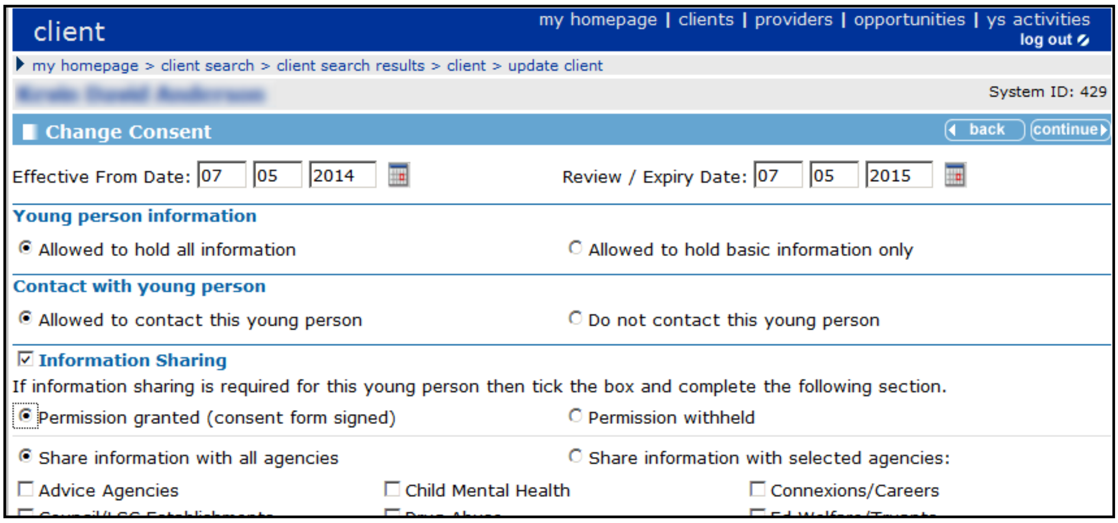
Consent to share information with other agencies only needs to be changed if:

- Permission has been denied by the young person or their parents, to hold anything but basic data.
- The young person has said they do <u>not</u> wish to be contacted for a given period.
- The record contains ‘sensitive’ information as prescribed by the Data Protection Act.

Changing Consent to Share Information

To change consent on a client record:

1. In the client's record, go to the **Consent…** section and click the **change** button to display the **Change Consent** dialog.
2. Select the **Information Sharing** check box.
3. Select either **Permission granted (consent form signed)** or **Permission withheld**.



4. If you select **Permission Granted,** you can choose which agencies and information you want to share with. Alternatively you can opt to select **Share Information with all agencies**.
5. If required, add **Consent Notes**.
6. Click the **continue** button to return to the client page. Your changes are displayed in the **Consent…** section.

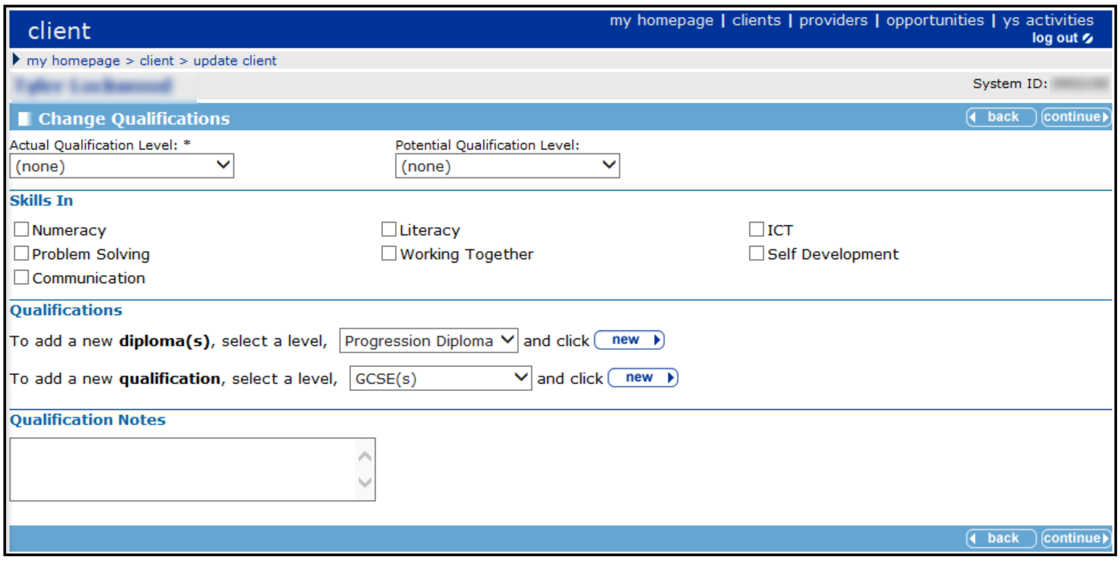
> ***NOTE:*** *If **permission withheld** had been recorded, then an alert is displayed on the header bar of the record, as follows*
>
> Information sharing is required but permission has not been granted.

Qualifications and Attainments section

You can record both actual and forecast qualifications in the **Qualification and Attainments** section.

Adding Qualifications

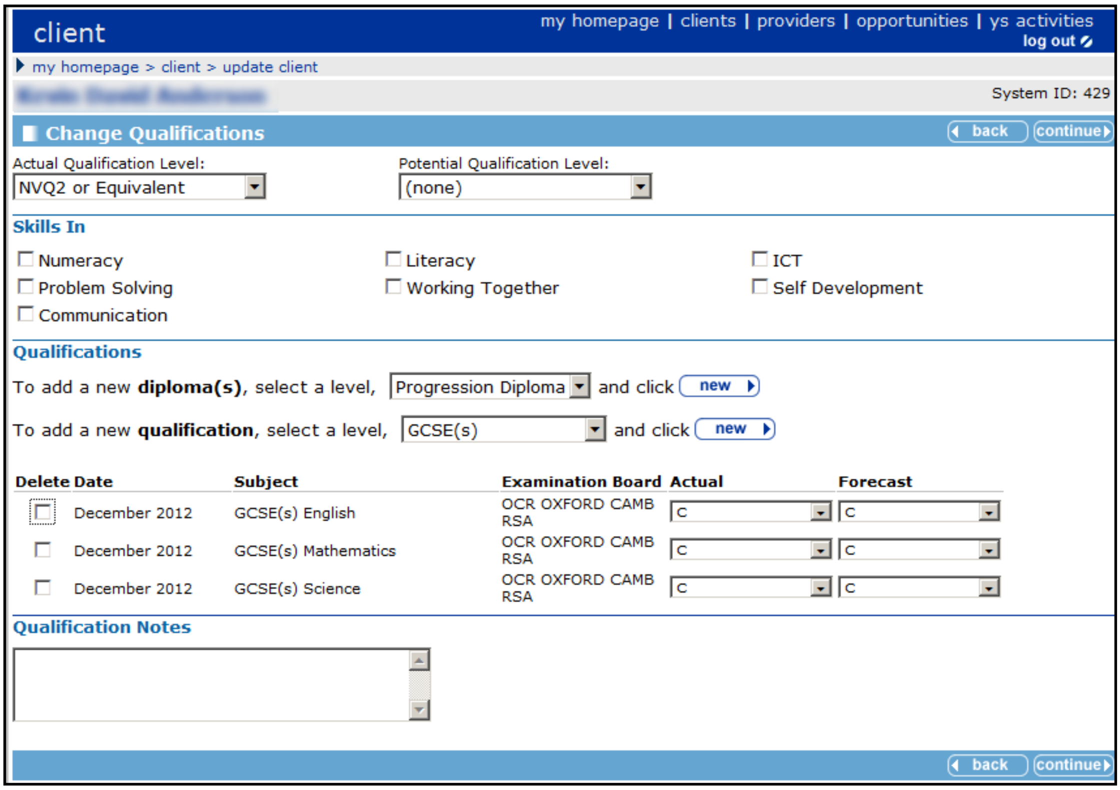
1. In the client's record, go to the **Qualifications and Attainments** section and click the **change** button to display the **Change Qualifications** dialog.



2. In the **Qualifications** section, select the level you want from the **To add a new qualification...** drop down list.
3. Click the **new** button to display the **New [level] Qualification(s)** dialog.
4. Enter date of the qualification. You can also enter the examining board, and a forecast or actual grade.

5. Select the **Subjects** and click the **continue** button to display the **Change Qualifications** dialog.

   The new qualifications are displayed in the **Qualifications** section where you can update the **Actual** or **Forecast** grades, if necessary.



6. Add any **Qualification Notes** required then click the **continue** button to return to the client record. The new qualifications are displayed in the client's record.

Aspirations section

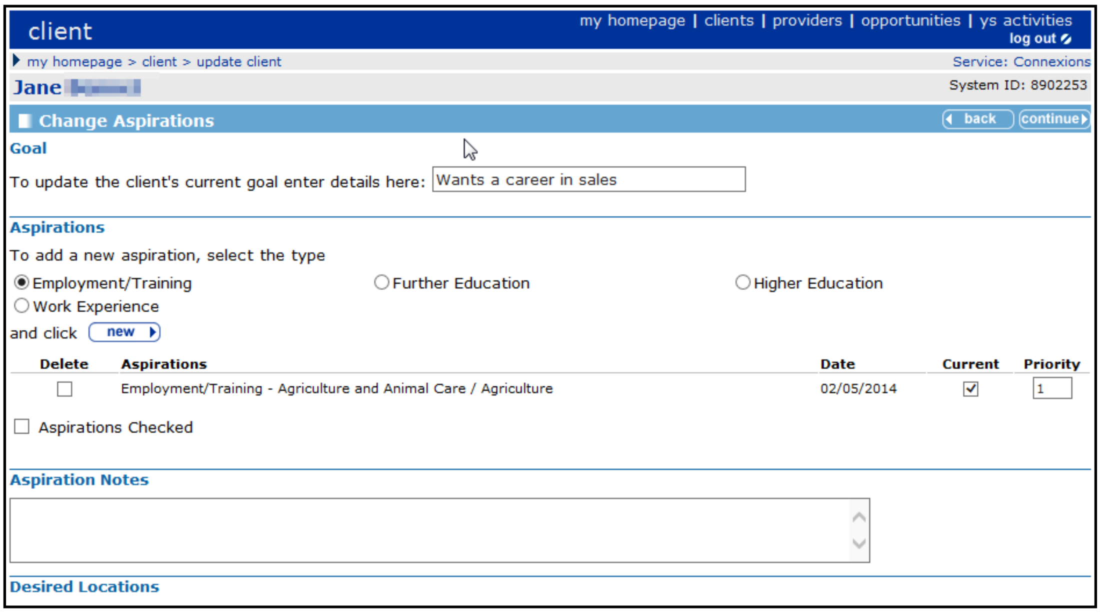
Aspirations are added to client records to identify the young person's future plans, e.g. further education or employment and training.

Use employment aspirations to match the young person to job vacancies.

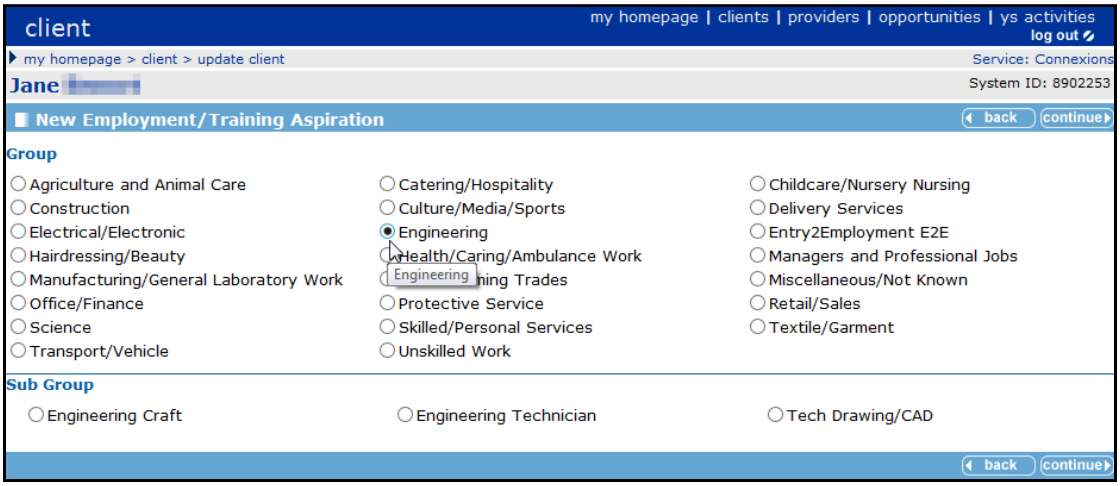
Updating Aspirations

To update aspirations and add an employment aspiration:

1. In the client's record, go to the **Aspirations** section of the client page, and click the **change** button to display the **Change Aspirations** dialog.



2. In the **Goal** section, you can add a free text statement about the young person's current goal, e.g. Client wants a career in sales.
3. Select **Employment/Training** as the **Aspiration** type and click the **new** button to display the **New Employment/Training Aspiration** dialog.
4. Select the occupation **Group** to which the aspiration belongs e.g. Engineering.
5. From the occupation **Sub Group** select the specific job, e.g. Tech Drawing/CAD.
6. Click the **continue** button to return to the **Change Aspirations** dialog.



7. Record **Aspiration Checked**, if applicable. This records when, and by whom, **Aspirations** were last checked so that other users can assess how up to date the information is.
8. If the young person is looking for work in a particular location, select **Desired Locations**.
9. Select an **Intended Destination**, if appropriate

In the **Aspirations** section, the aspiration has been added and marked as **Current** and **Priority 1**. You can change these now or in the future if the young person's plans change.

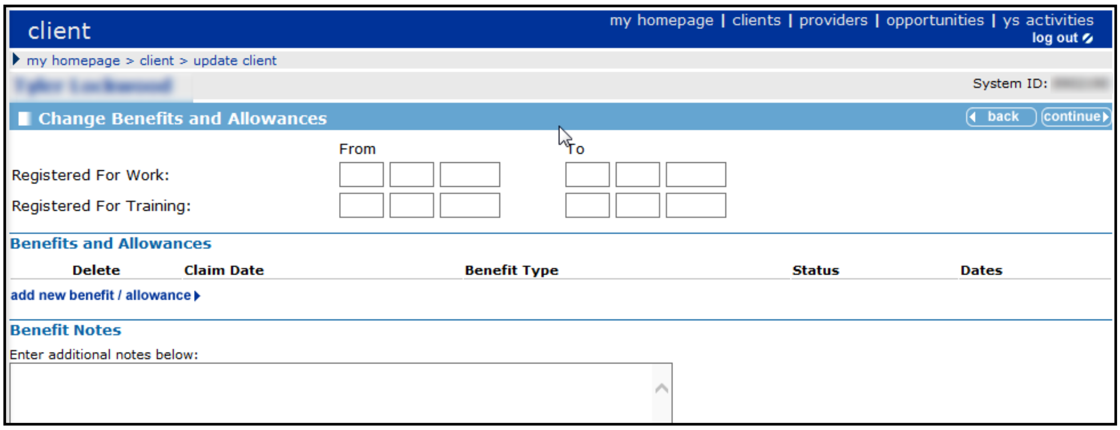
10. Add any relevant **Aspiration Notes**, if required.
11. Click the **continue** button to return to the client record.

Benefits and Allowances section

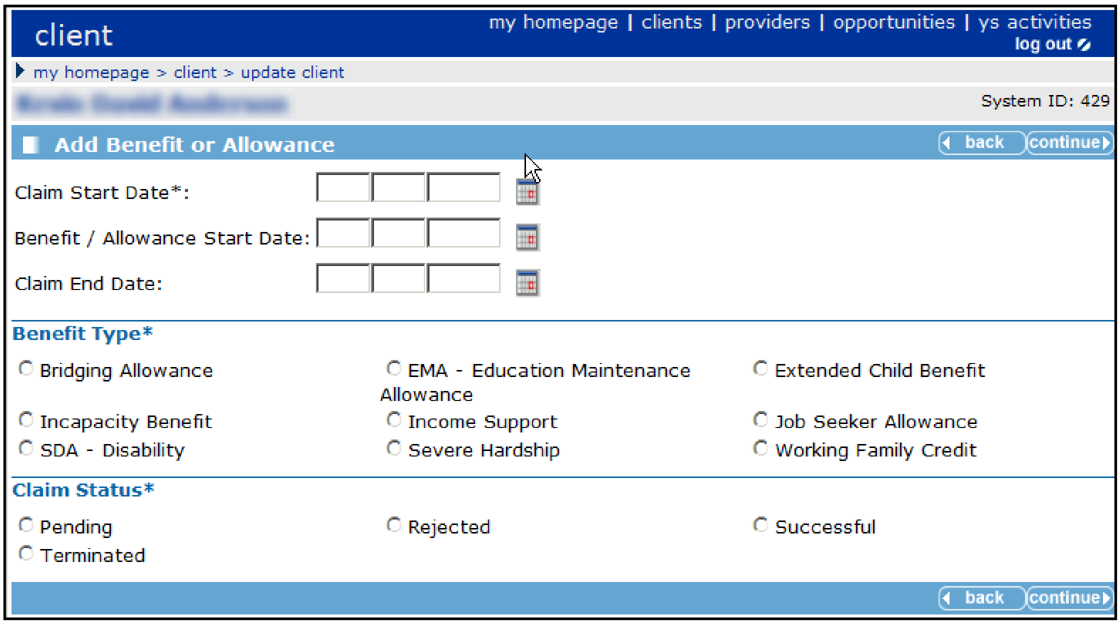
Adding a Client's Benefits and Allowances

To add or update a client's benefits and allowances:

1. In the client's record, go to the **Benefits and Allowances** section and click the **change** button to display the **Change Benefits and Allowances** dialog.



2. If relevant, enter the **From** and **To** dates on which the client registered for work/training.
3. Click the **add new benefit/allowances** link to display the **Add Benefit or Allowance** dialog.



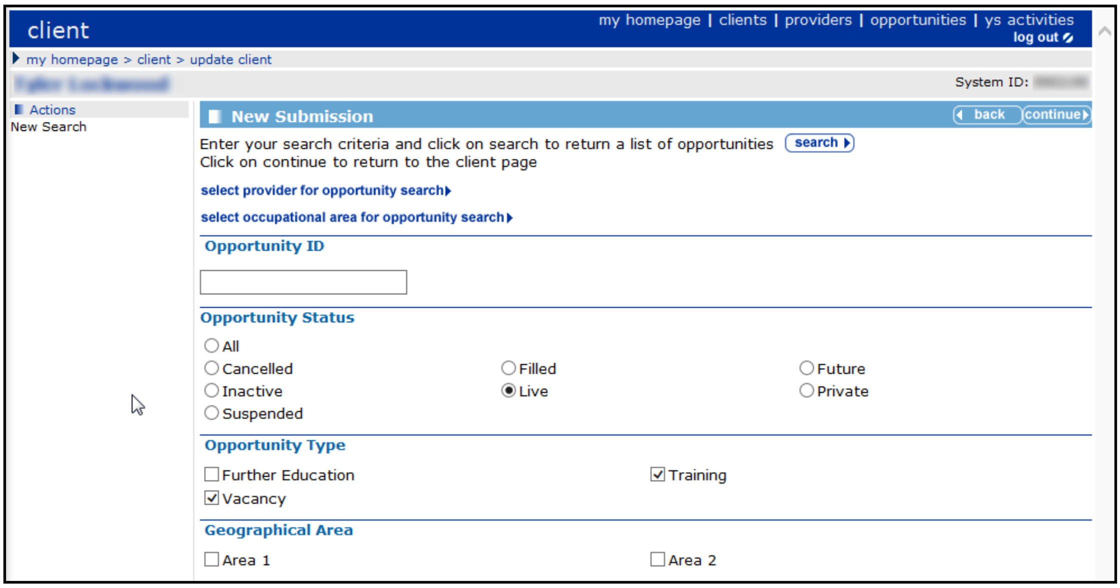
4. Enter the **Claim Start Date**.
5. Select the **Benefit Type**.
6. Select the **Claim Status**.
7. Click the **continue** button to return to the **Change Benefits and Allowances** dialog. Details of the benefit claim are displayed in the **Benefits and Allowances** area.

8. If required, you can add **Benefit Notes** relating to the claim.
9. Click the **continue** button to return to the client record which is updated with the new benefit/allowance claim.

Submitting an Opportunity

To add a submission to a client record using an opportunity ID:

1. In the client's record, go to the **Opportunity Submissions** section and click the **new** button to display the **New Submission** dialog.



2. Enter the **Opportunity ID** of the opportunity you require.
3. Click the **search** button to display the opportunity search results.
4. Select the **Submit** check box and select a submission status from the drop-down list.
5. If the **Submission Status** is related to an interview, enter the interview date and time.
6. Click the **continue** button.

   The submission is displayed in the side panel. You can search for more opportunities, if required, by clicking **new search** and entering different criteria.

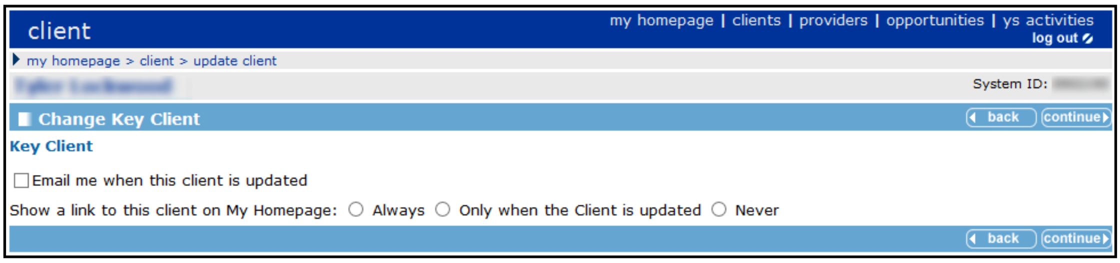
   When you return to the client dialog the submissions are displayed as activities completed and also displayed on the **Opportunity Submissions** section.

NOTE: *You can also use **Occupational Area** or **Provider** to search for opportunities.*

Creating a Key Client

To create a key client:

1. On the client record page, select **Key Client** from the **Actions** panel on the left-hand side of the dialog to display the **Change Key Client** dialog.



2. In the **Key Client** section select:
   - **Email me when this client is updated** if you want to be notified via email when a colleague updates the record.
   - **Always** if you want the client to always appear in the **Key Clients** portal of **My Homepage**.
   - **Only when the client is updated** if you want the client to appear in the **Key Clients** portal of **My Homepage** when it has been updated by a colleague. OneIYSS removes the client from the panel after you have viewed the record.
3. Click the **continue** button to return to the client record.

A key icon is displayed on the record header bar of any client record where you have identified the client as a key client.

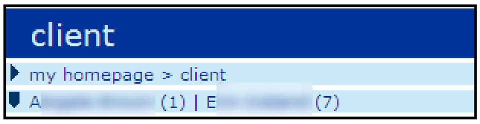
Removing Key Client status from a client record

1. On the client record page, select **Key Client** from the **Actions** panel on the left-hand side of the dialog to display the **Change Key Client** dialog.
2. In the **Change Key Client** area, select **Never**.
3. Uncheck the **Email me when this client is updated** check box.
4. Click the **continue** button to return to the client record. The key icon is no longer displayed on the client record header bar.

Bookmarking Clients

Use the **Bookmark Client** facility to display a link at the top of the **client** record to give you quick access to client records.

Bookmarked clients' names and IDs are displayed on a **My Bookmarks** header bar:



When you click on a bookmarked client, their record opens. Bookmarking a client is like minimising in a Windows environment.

1. On the client record page, select **Bookmark Client** from the **Actions** panel on the left-hand side of the page.

   The client **name** and **id** are displayed on the **My Bookmarks** header bar.

2. If required, repeat this with other clients.

NOTE: *Bookmarks are removed when you log out of OneIYSS.*

To remove a bookmark, click **Remove Bookmark** from the **Actions** menu.

Special Alert

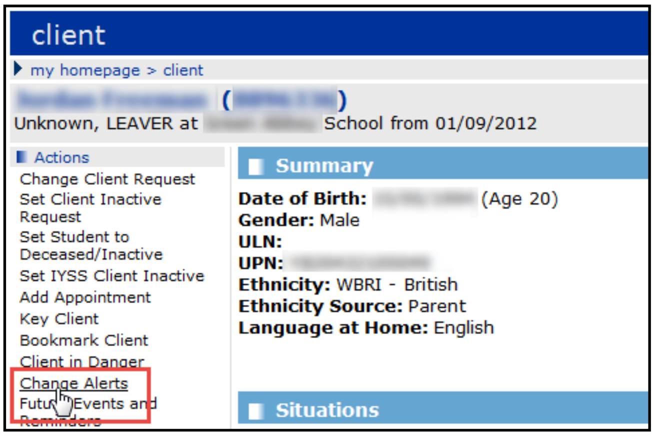
A special alert identifies important information to be aware when working with a particular client, for example, to highlight staff health and safety issues.

Details of an issue can be recorded in **Personal Notes**, if required. For more information, see Notes section on page *44*.

Adding a Special Alert

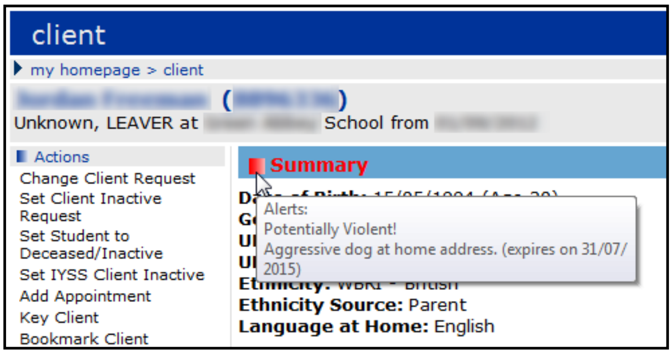
To add a special alert to a client's record:

1. In the client's record, select **Change Alerts** from the **Actions** menu to display the **Change Alert** dialog.



2. Enter the details of the special alert in the **New Alert** text box.
3. If appropriate, enter an **Expiry Date** for the special alert.
4. Click the **new** button, to add the special alert to the list on the **Change Alert** page.
5. Click the **continue** button to return to the client record.

The alert is displayed in the **Summary** section title in red text, identifying that there is an alert for this client. If you mouse-over the **Summary** icon, the alert is displayed:



Removing a Special Alert

This procedure shows how to remove a special alert from a client record.

1. In the client's record, select **Change Alert** from the **Actions** menu to display the **Change Alert** dialog.
2. Select the **Delete Alert** check box adjacent to the alert you want to remove.
3. Click the **continue** button to display the client's record.

SMS and Email Messages

OneIYSS enables you to send SMS or email messages to individual young people or to a group of young people.

The **Send Message** link is only displayed on the young person's record if they have a mobile number or email address recorded in the **Summary** section of their record.

When a message is sent, an interaction is automatically recorded on the young person's record with the message included.

> ***NOTE:*** *Messages are sent periodically by your organisation, e.g. every ten minutes.*

If the young person replies to the message, OneIYSS sends you an email alert. The reply is added to the interaction section of the client record.

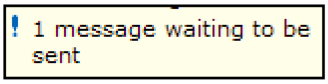
Sending a Message

To send a message to a client:

1. In the client's record, select the **Send Message** link in the **Actions** panel on the left side of the dialog.
2. Select whether the message will be sent via **Email** or **Text** (the options displayed depend on whether the client has an email address or a mobile phone number recorded).

> ***NOTE:*** *If you send a text message, a character counter alerts you if your message is too long.*

3. Enter a subject and then type in a message.
4. Click the **continue** button. In the side panel, a note is displayed:

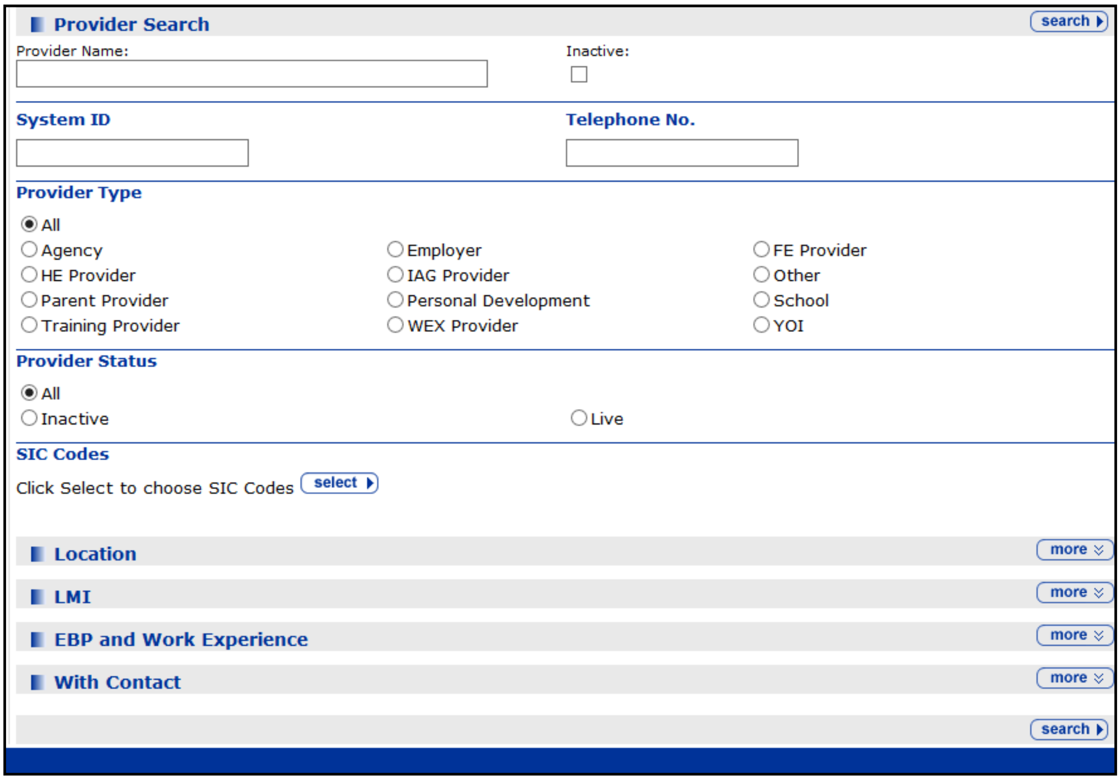


05 | Providers and Opportunities

Searching and Viewing Providers

This procedure shows how to search for providers. You can search for particular providers and view the provider search results.

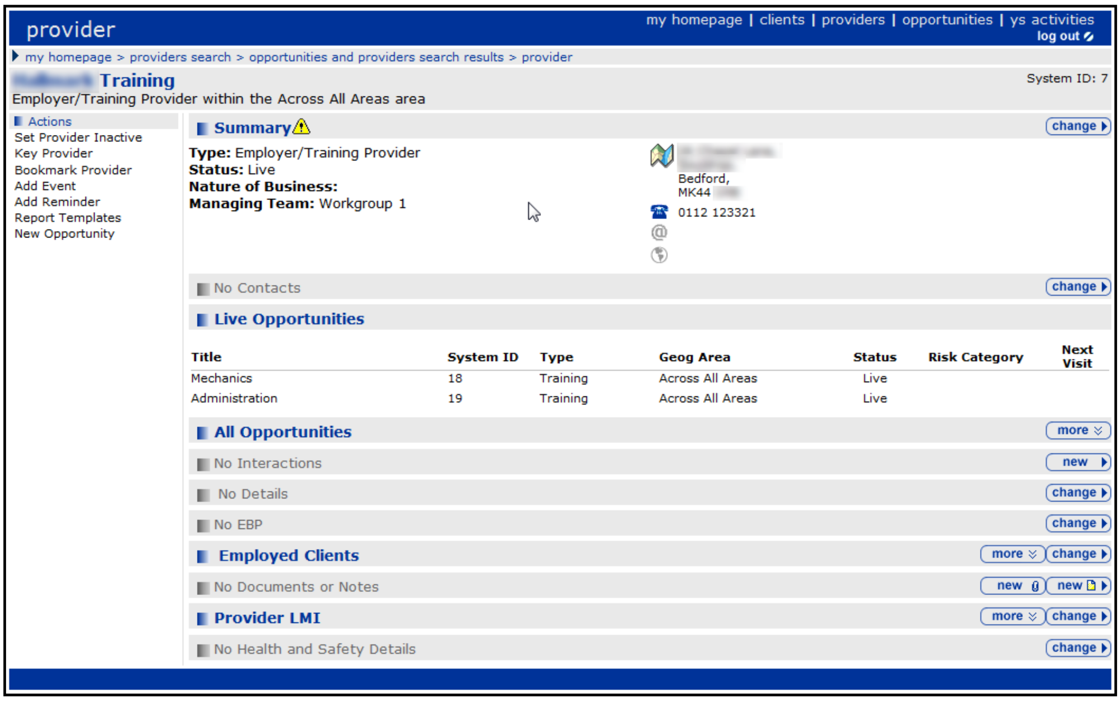
1. From **My Homepage** page, click the **providers** link on the top header to display the **Provider Search** dialog.



2. Search for a provider by entering one or more search criteria.
3. Enter search criteria in the other panels, if required, i.e. **Location, LMI**, **EBP and Work Experience** and **With Contact**.
4. Click the **search** button to display the **Search Results** dialog.

NOTES: *If the search criteria are too broad and the maximum number of records is exceeded, you will see the following message – 'Your search has exceeded the maximum allowed records returned (250 records). Please refine your search and retry. You can however, use a report to view the records returned from this search.'* *If there are a large number of search results, use the* ***next*** *and* ***previous*** *buttons to move through the additional pages.*

5. Click a **Provider** to display the provider **Summary** dialog, where provider details and opportunities are shown.

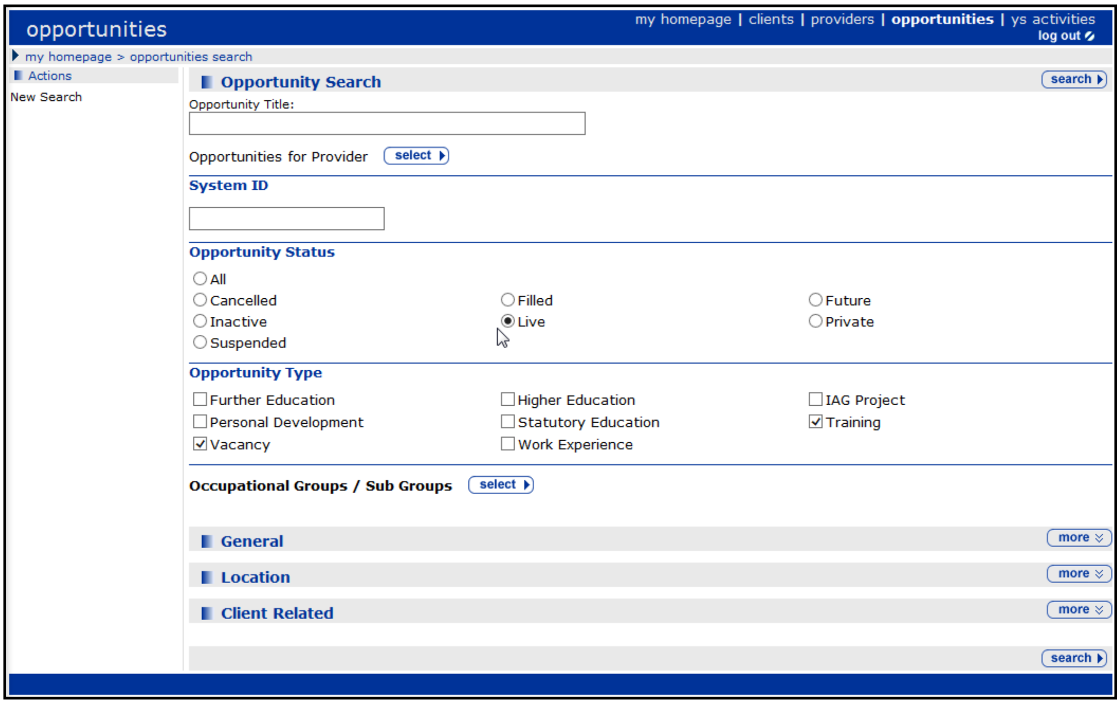


You can use the links in the navigation bar to return to the opportunity and provider **Search Results** dialog.

Searching and Viewing Opportunities

To search for and view opportunities.

1. On **My Homepage**, click the **opportunities** link on the top header bar to display the **Opportunity Search** dialog.



2. Search for an opportunity by entering one or more search criteria, e.g.

a. **Opportunity Title**: Enter part or all of the opportunity name,

b. **Opportunities for Provider**: To narrow the opportunity search to a particular provider:

   i. Click the **select** button to display the **Search Opportunities - Select Provider** dialog.

   ii. Enter part or all of the provider's name, then click the **search** button to display the search results.

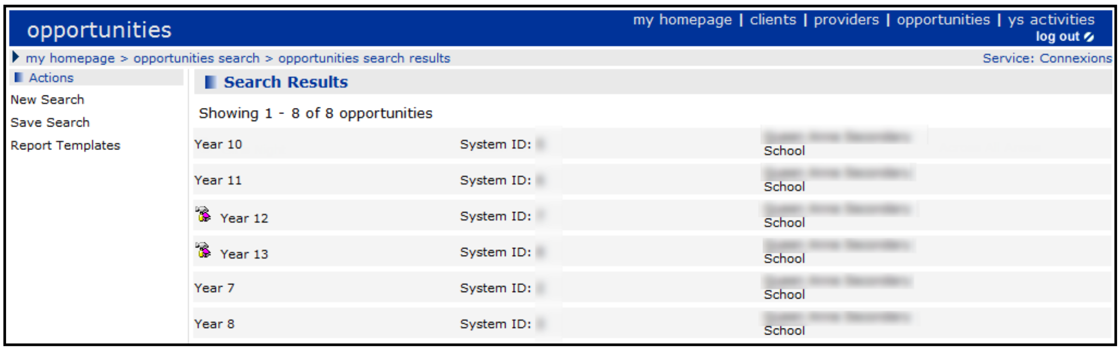
   iii. Select the required provider, then click the **continue** button to return to the **Opportunity Search** dialog.

c. **System ID**: Enter an opportunity ID,

d. **Opportunity Status**: Select a radio button,

e. **Opportunity Type**: Select one or more checkboxes.

3. If required, enter search criteria in the other panels, i.e. **General, Location** and **Client Related**.
4. Click the **search** button to display the **Search Results** dialog.



> ***NOTE:** If there is more than one page of search results, use the **next** and **previous** buttons to move through the additional pages.*

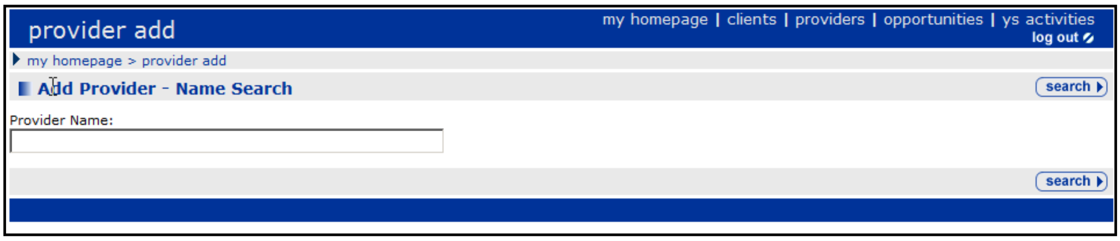
5. To view opportunity details, click the opportunity name to display the **Opportunity Summary** dialog.

   To return to the **Opportunity Search Results** dialog, use the links in the navigation bar.

Adding a Provider

To add a provider:

1. On **My Homepage**, click the **New Provider** link in the **IYSS Links** section to display the **provider add** dialog.



2. Type the name of the provider in the **Provider Name** field, then click the **search** button.

   If the provider name is not in the system, OneIYSS displays the **Add Provider** page.

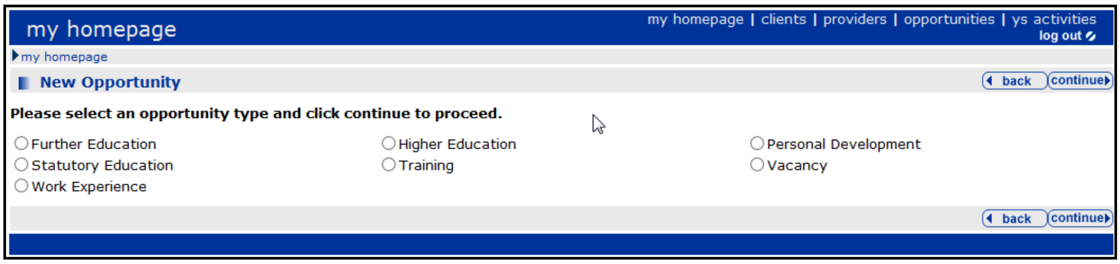
   If a similar provider name is already in the system this message is displayed 'These provider(s) have been found as potential duplicates to the data you have entered. If the provider you are adding is not in the list, click **continue** to add the **Provider**. If the provider is in the list, click on the name to edit the record.'

3. To add a new provider who is not in the list, click the **continue** button.
4. On the **Add Provider** page, enter the details required and click the **continue** button.
5. On the provider **Summary** page, you can enter any further details for the provider.

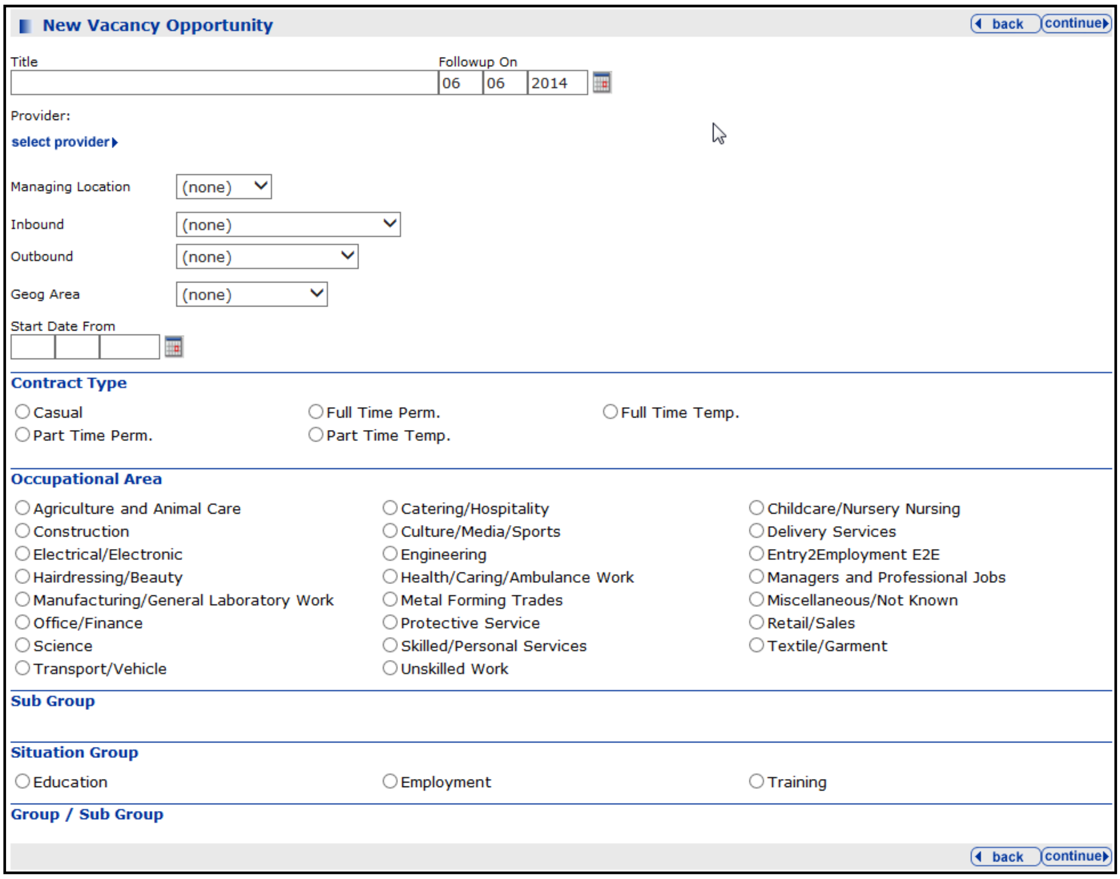
Adding a Vacancy Opportunity

To add a vacancy opportunity:

1. On **My Homepage**, click the **New Opportunity** link in the **IYSS Links** section to display the **New Opportunity** dialog.



2. Select the **Vacancy** radio button.
3. Click the **continue** button to display the **New Vacancy Opportunity** dialog.



4. Enter the details of the new opportunity.

5. Click the **select provider** link to display the **New Vacancy Opportunity - Add Provider** dialog.

6. Search for the provider you want by entering search criteria, then click the **search** button to display the search results.
7. Choose a provider from the displayed list on the **New Vacancy Opportunity – Add Provider** dialog.
8. Click the **continue** button to return to the **New Vacancy Opportunity** dialog.
9. Enter the details required and click the **continue** button to display the **Summary** dialog.

10. The opportunity has been saved. However, to add more details to the opportunity:
    - In the **Monitoring** section, click the **change** button to update the **Places** and **Submissions** details. To add a new opportunity place, click the **new** button to display the **New Opportunity Place** dialog.
    - In the **Narrative** section, click the **change** button to display the **Change Narratives** dialog where you can add the detailed description of the opportunity.

More ways to add an Opportunity

You can also add a new opportunity from a provider’s record. Click the **New Opportunity** link from the **Actions** panel in the provider's **Summary** dialog to display the **New Opportunity** dialog.

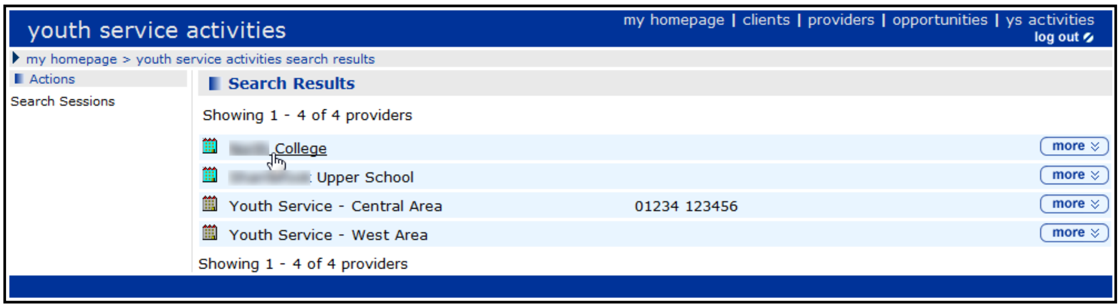
To add an opportunity that is similar to one already on OneIYSS, use the **Save As** facility on an existing opportunity.

06 | Youth Service (YS) Sessions

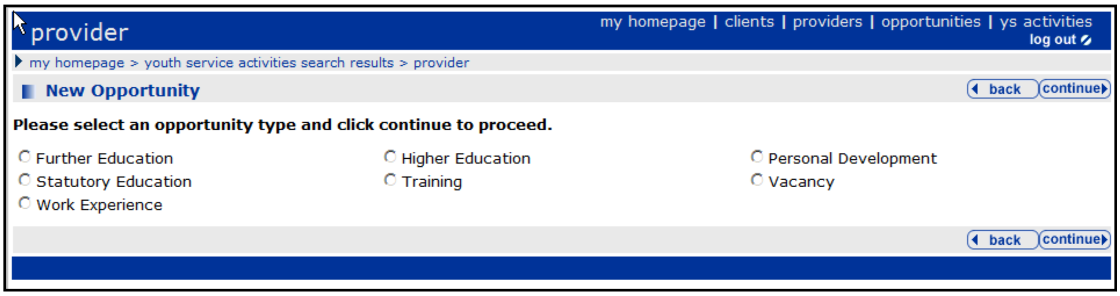
Adding a YS Activity

To add a youth service (YS) activity:

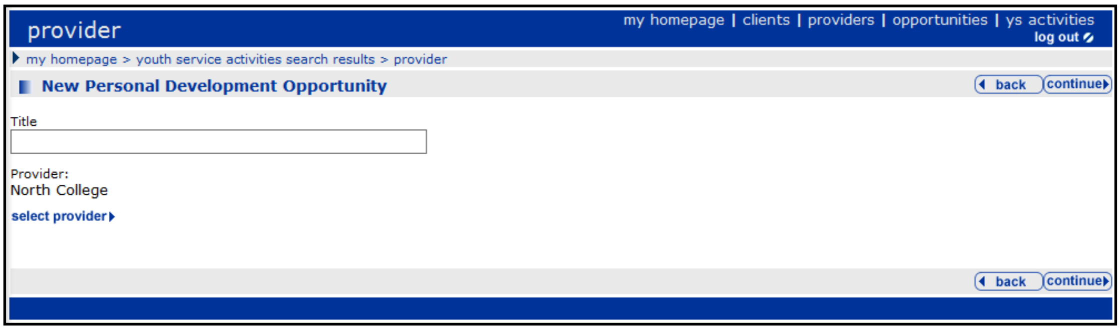
1. On **My Homepage**, click the **ys activities** link to display the **Search Results** dialog.



2. Select the provider you want from the returned search results list to display the **Summary** dialog.
3. Select **New Opportunity** from the left-hand **Actions** panel to display the **New Opportunity** dialog.



4. Select the opportunity type of **Personal Development**.
5. Click the **continue** button to display the **New Personal Development Opportunity** dialog.

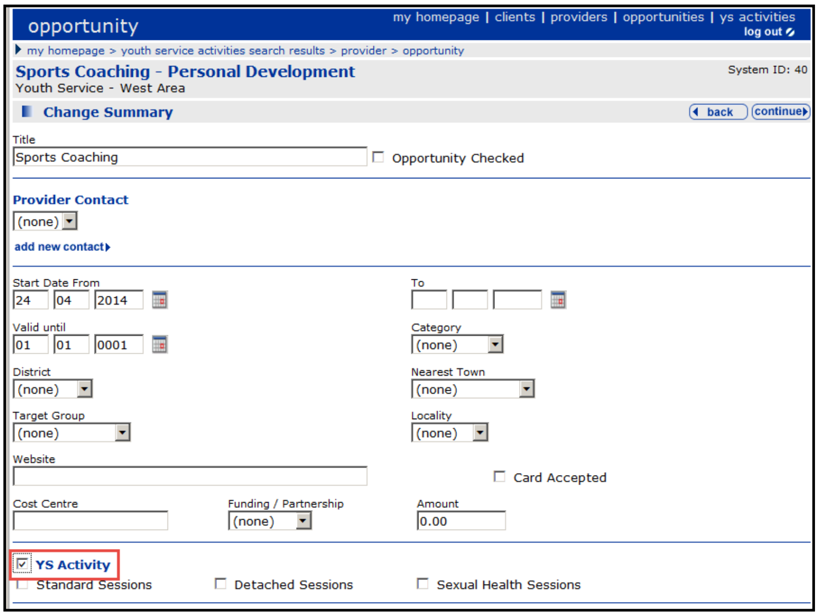


6. Enter a **Title** for the opportunity.

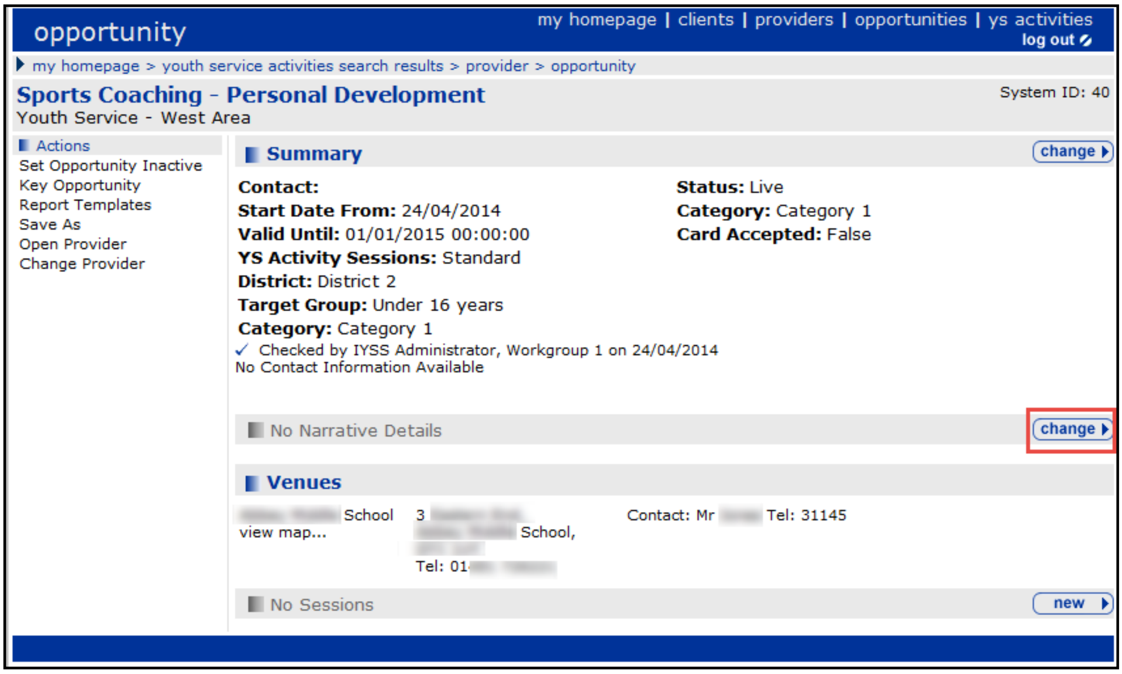
> ***NOTE:*** *You do not need to select the provider as it is already completed, but if you need to link the opportunity to a different provider, use the **select provider** link.*

7. Click the **continue** button to display the **New Opportunity** dialog.

8. Complete any other required fields.



9. You must select the **YS Activity** checkbox. If you do not select this, the activity will <u>not</u> be displayed on the **YS Activity** page.
10. Select a **Venue** by clicking the **new** button and enter a name to search for the venue.
11. Click the **continue** button to display the **Summary** dialog.
12. Click the **change** button on the **Narrative** section.



13. Enter text to describe the **Activity**.
14. Click the **continue** button to return to the **Summary** dialog.

If you click **ys activities** link in **my homepage**, the new YS activity is displayed under the relevant provider:

The **Activity** record is now complete and ready to add **Sessions**.

Adding Sessions to an Activity

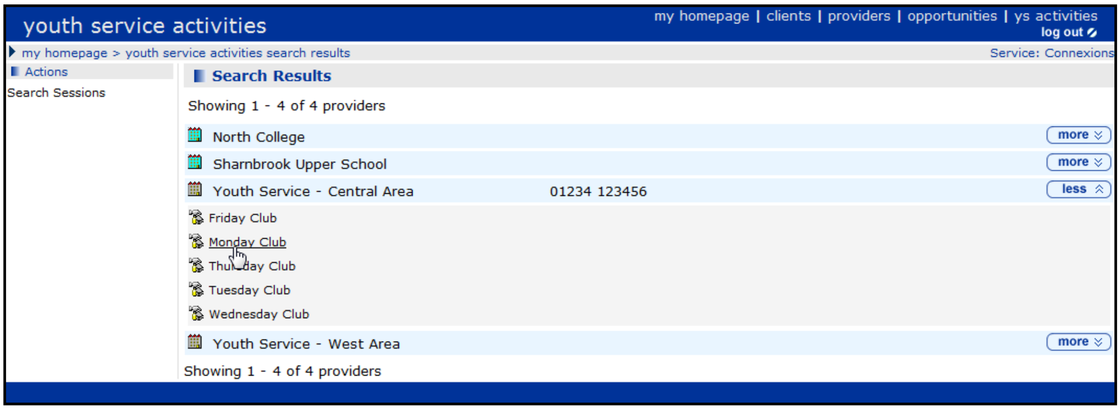
This procedure shows how to add sessions to a youth service (YS) activity. There are four parts as described below:

- Part 1 – Opening a new Session
- Part 2 – Entering Curriculum details
- Part 3 – Changing Client Attendees
- Part 4 – Adding a Session Evaluation

Part 1 – Opening a new Session

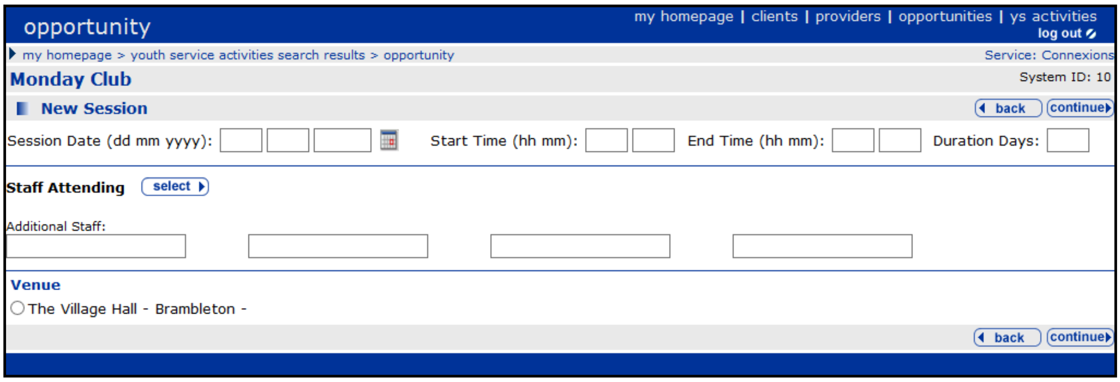
1. Click the **ys activities** link on **my homepage** header bar to display a list of providers.

2. Click the **more** button adjacent to the **YS service area** for which you want to display a list of **Activities**.



3. Select an **Activity**.

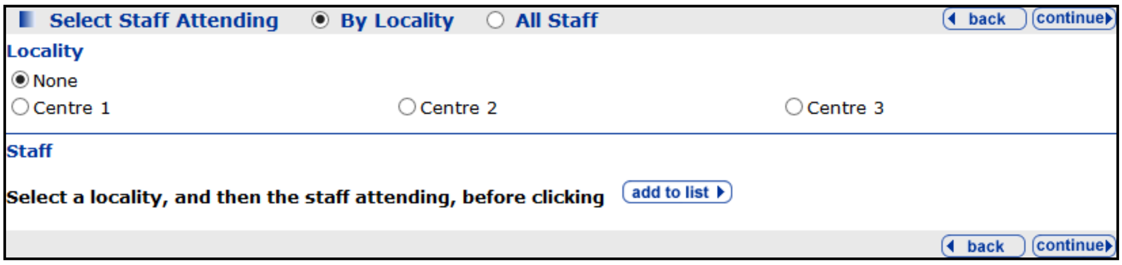
4. In the **Sessions** section, click the **new** button to display the **New Session** dialog.



5. Add a new **Session Date** (you can use the calendar icon to select the date).
6. Enter a session **start** and **end time** (hh mm), e.g. 01 00
7. Enter the number of **Duration Days,** if relevant.
8. Select the **Venue**.
9. Click the **select** button in the **Staff Attending** panel to add staff to the session. For more information, see the following section, *Selecting the staff who will attend the session*.

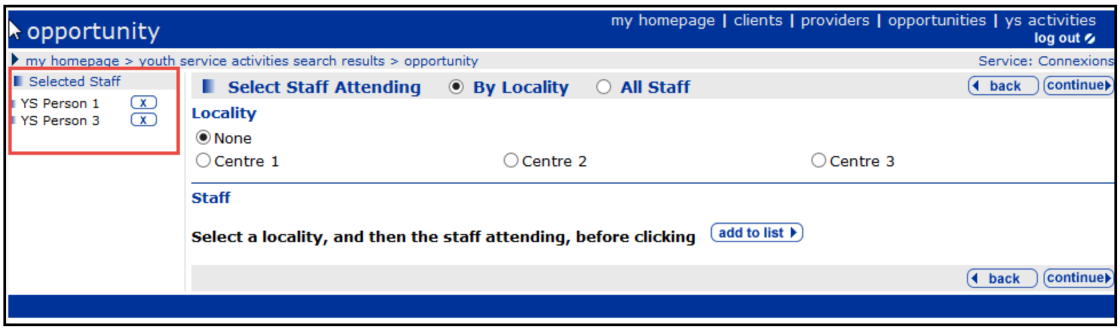
Selecting the staff who will attend the session:

1. In the **Staff Attending** section, click the **select** button to display the **Select Staff Attending** page.
2. Select staff by selecting either the **By Locality** check box or the **All Staff** check box.



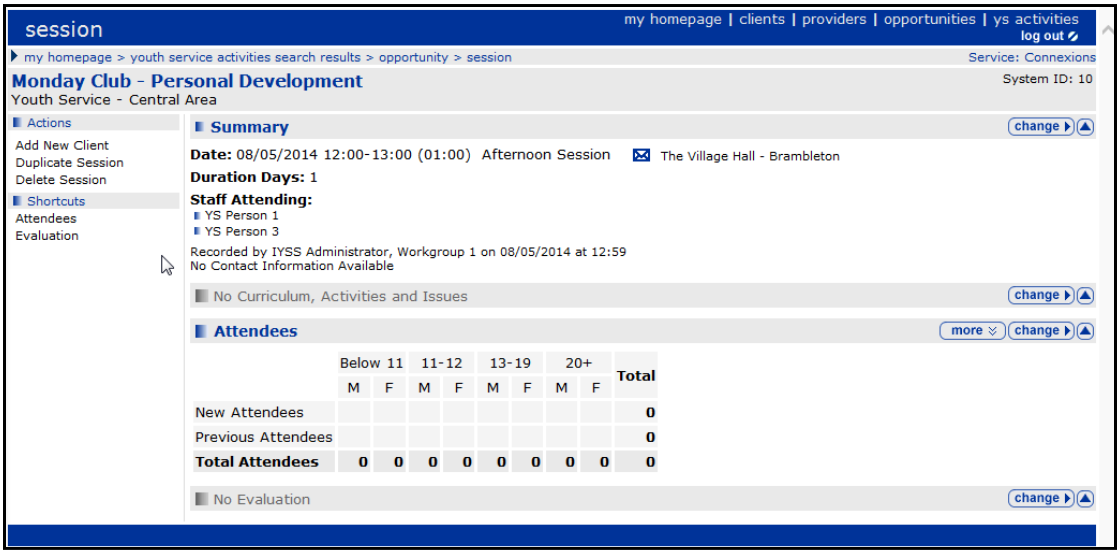
***NOTE:** If you choose **By Locality** only staff from that locality are available for selection.*

3. Select staff that are attending the session and then click the **add to list** button. If you have used the **By Locality** option, you can repeat the above steps if you want to choose more staff from another locality, if applicable.
4. The names of the staff attending are displayed in the left-hand column of the screen under **Selected Staff**. You can remove any staff by using the **Remove Activity** button beside their name.



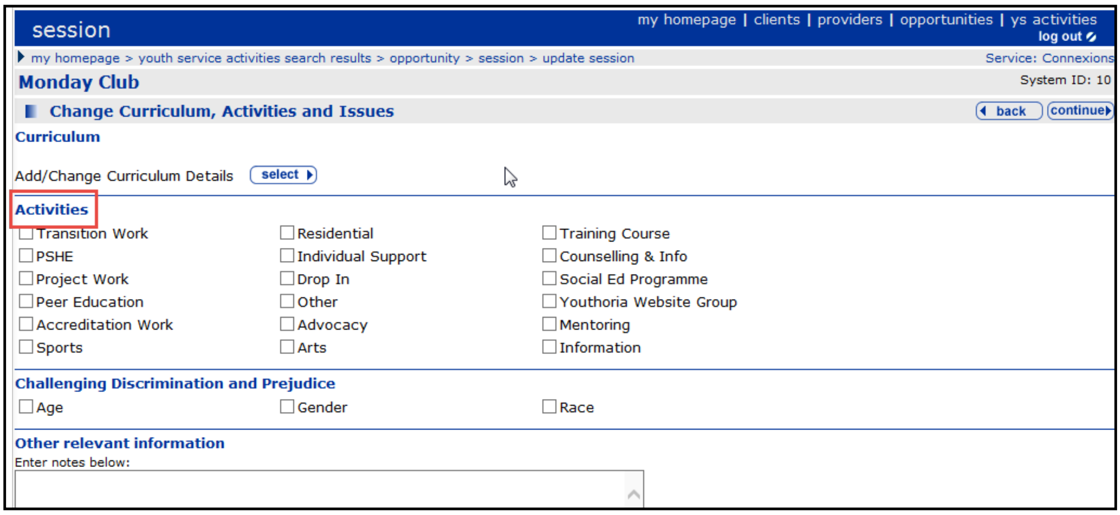
> ***NOTE:*** *You can use the* ***Additional Staff*** *fields to enter staff that are* *<u>not</u>* *available in the search, for example volunteers.*

5. When you have added the staff you want, click the **continue** button to display the **Summary** dialog, where all details of the new session you have entered are displayed.



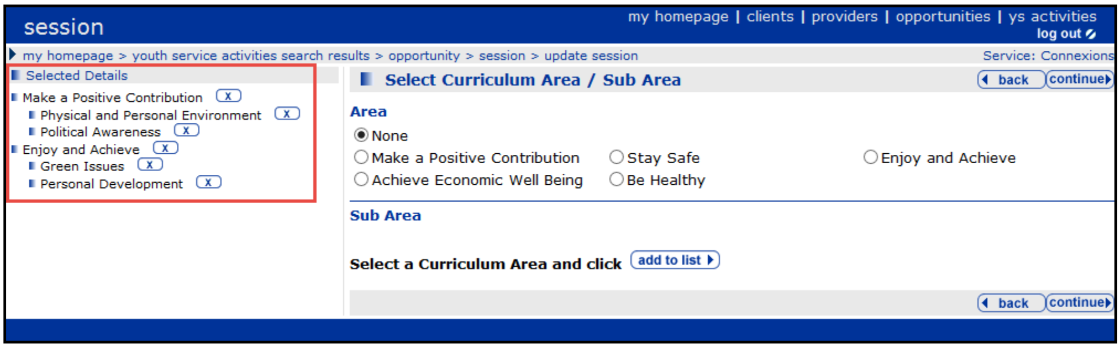
Part 2 – Entering Curriculum details

1. Now enter information in the **Curriculum**, **Activities and Issues** section of the activity **Summary** dialog by clicking the **change** button to display the **Change Curriculum, Activities and Issues** dialog.
2. In the **Activities** section, choose one or more activity options for your session.



3. In the **Challenging Discrimination and Prejudice** area, choose one of the available options.
4. If appropriate, enter notes in the **Other relevant information** field.
5. In the **Curriculum** section you can **Add/Change Curriculum Details**. Click the **select** button to display the **Select Curriculum Area/Sub Area** page.
6. Select an **Area** and a **Sub Area** then click the **add to list** button.

The **curriculum** and **sub curriculum** titles are displayed in the left-hand column of the screen under the **Selected Details** heading. You can remove any of these details using the **Remove Activity** button beside the name.

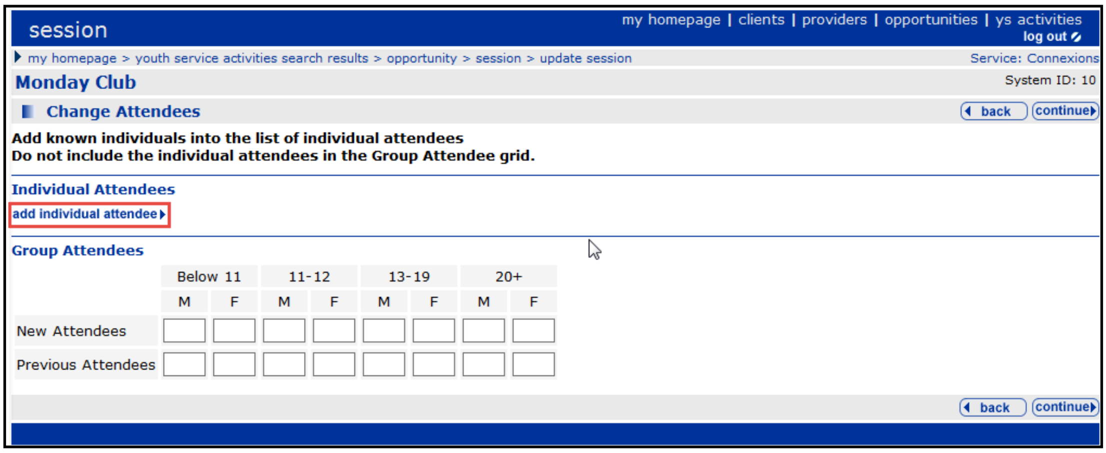


7. When the details are correct, click the **continue** button to display the **Summary** dialog. The **Curriculum**, **Activities and Issues** are now updated.

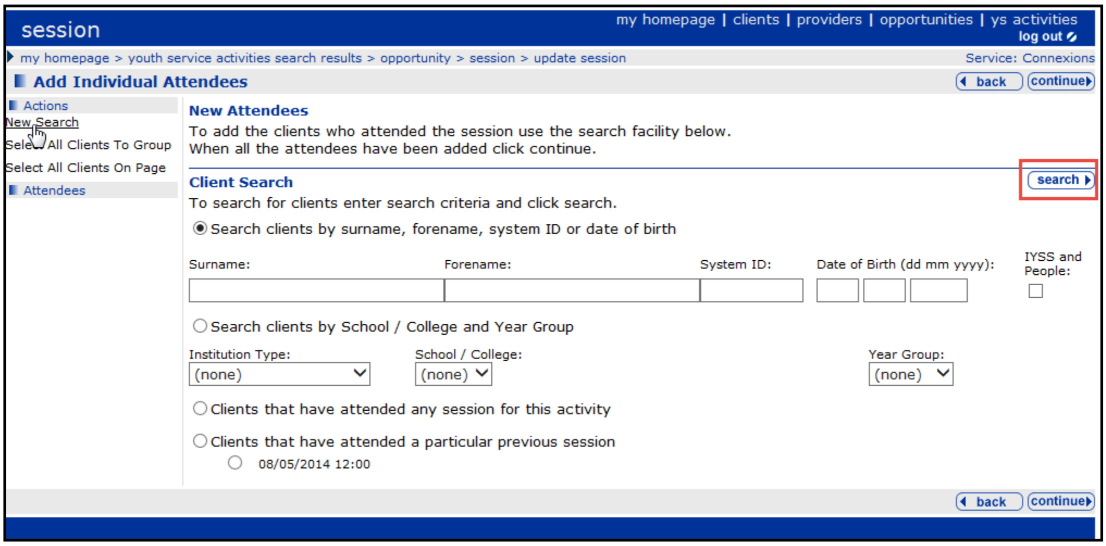
Part 3 – Changing Client Attendees

To make changes to the attendees:

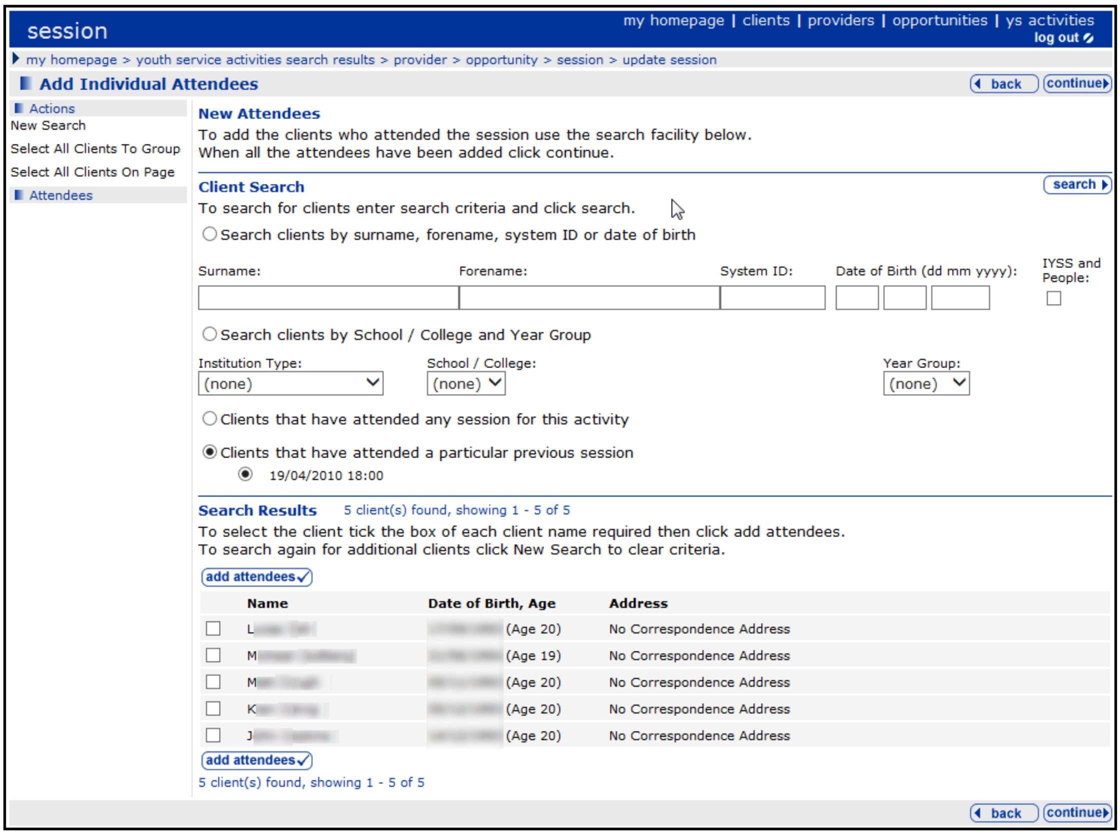
1. Click the **change** button in the **Attendees** section to display the **Change Attendees** dialog.



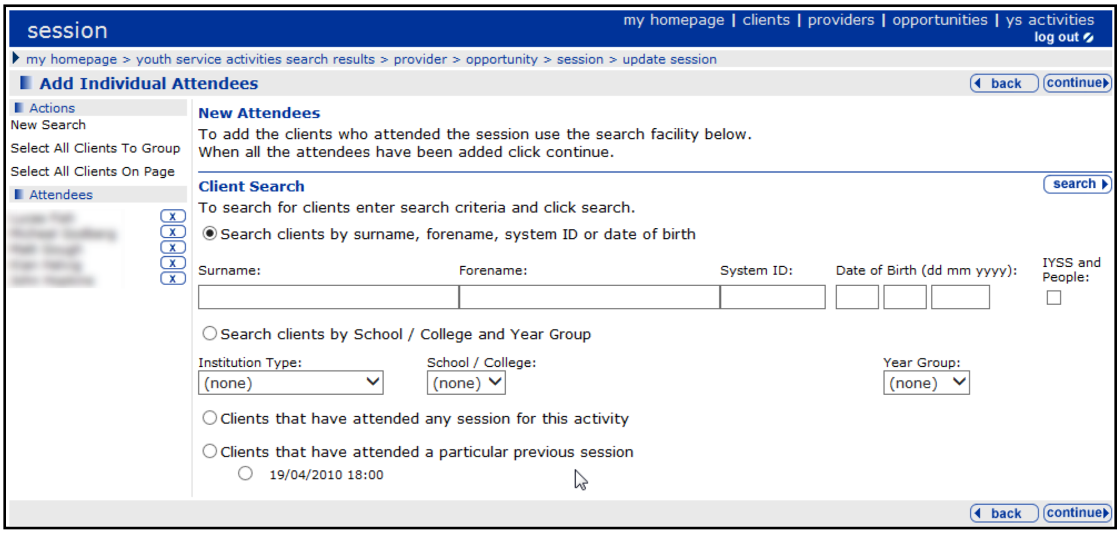
2. Search for clients in the **Individual Attendees** section by clicking the **add individual attendee** button to display the **Add Individual Attendees** dialog. Clients who have attended before are displayed.



3. Select clients that have attended a session within the last year and click the **search** button. The screen expands to display **Search Results** of the clients who attended previous sessions.

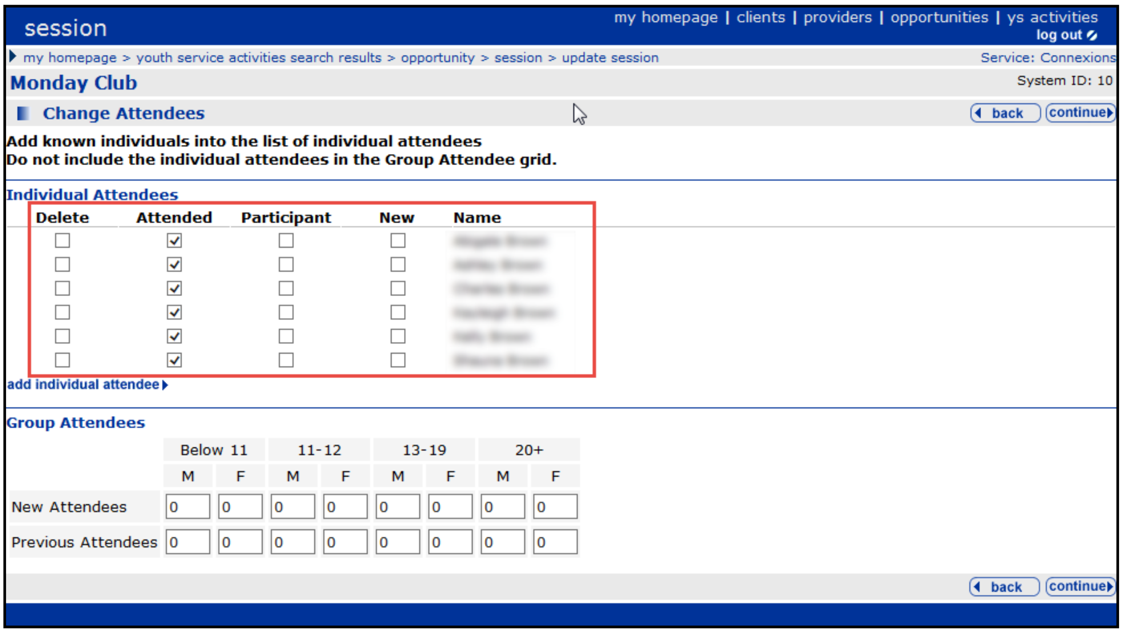


4. Select the names of the clients you want to attend and click the **add attendee** button. The selected clients are displayed on the **Attendees** panel on the left side of the dialog.
5. To add more clients, click **New Search** in the left-hand side **Actions** panel to search for individuals.



6. Type the **Surname** and **Forename** and click the **search** button to display the search results.
7. Select clients from the search results list and click the **add attendee** button. The selected clients are added to the **Attendees** list.
8. If your **Attendees** selection is now complete, click the **continue** button to display the **Change Attendees** dialog.

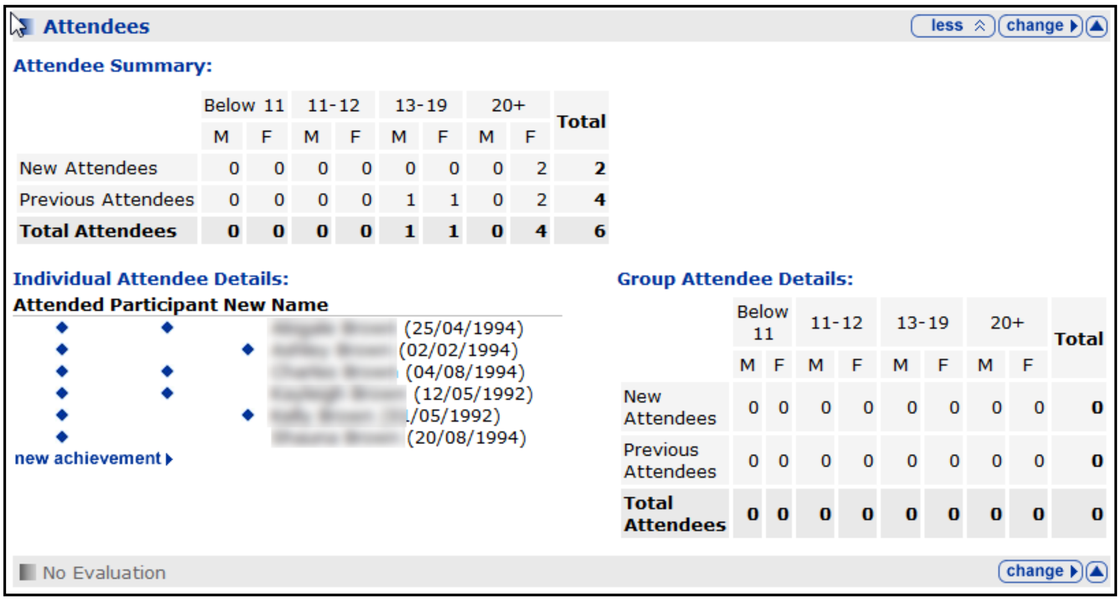
9. The list of attendees is displayed in the **Individual Attendees** section. Select the **Attended**, **Participant** and **New** boxes against the clients as appropriate.



10. For any young people attending the session whose names you do not have, you can use the **Group Attendees** section under the relevant gender and age headings.

11. Click the **continue** button to display the **Session** dialog. The summary of attendees is updated and shows individuals and the total numbers of attendees.

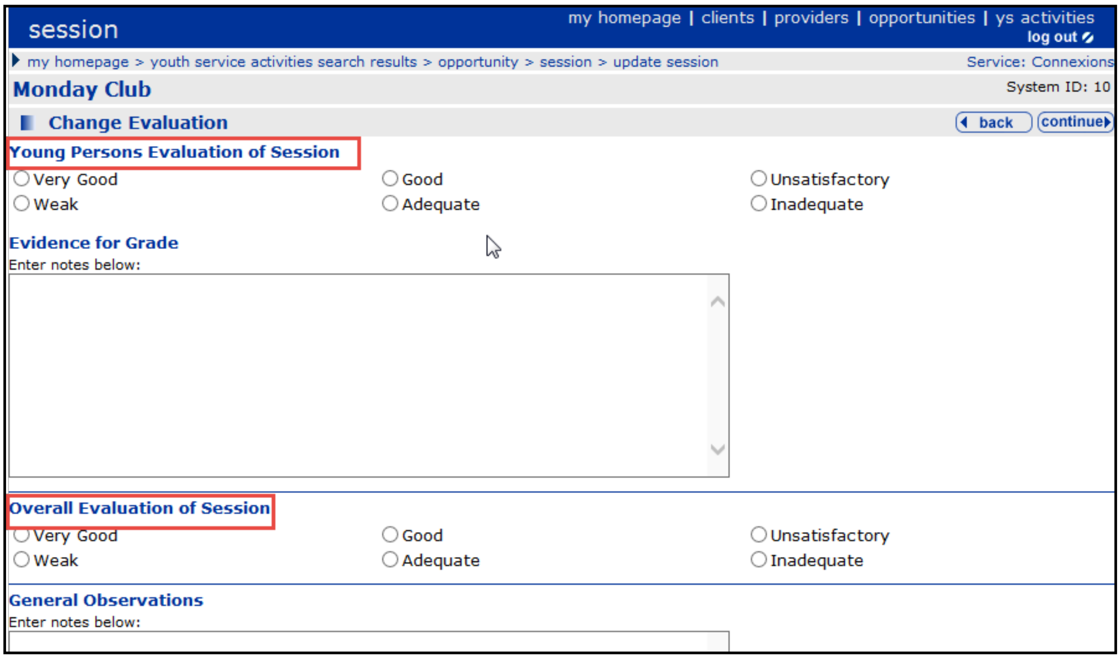
12. To expand the section and show more detail of the attendees, use the **more** button in the **Attendees** section. New and participant attendees are identified by the ◆ symbol.



Part 4 – Adding a Session Evaluation

To add a session evaluation:

1. Click the **change** button in the **Evaluation** section to display the **Change Evaluation** dialog. There are two main sections:
   - **Young Persons Evaluation of Session**
   - **Overall Evaluation of Session**



2. Complete these two section as follows:
   a. Select radio buttons to add an overall comment (from **Very Weak** to **Excellent)**
   b. Add notes to comment on relevant aspects of the evaluation.
3. Click the **continue** button to finish.
4. To see the overall evaluations in the **Evaluation** section, click the **more** button to expand the section to display the notes in the comment boxes.

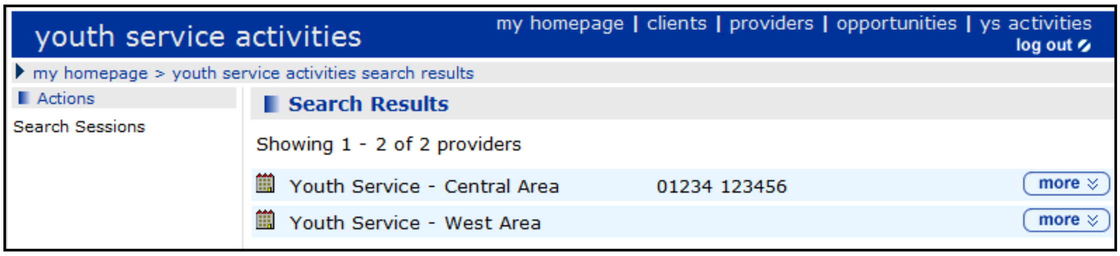
NOTE: *If you do not select attendees as participant they are marked as participants after attending 3 or 4 session (as defined by your organisation).*

Adding a Detached YS Session

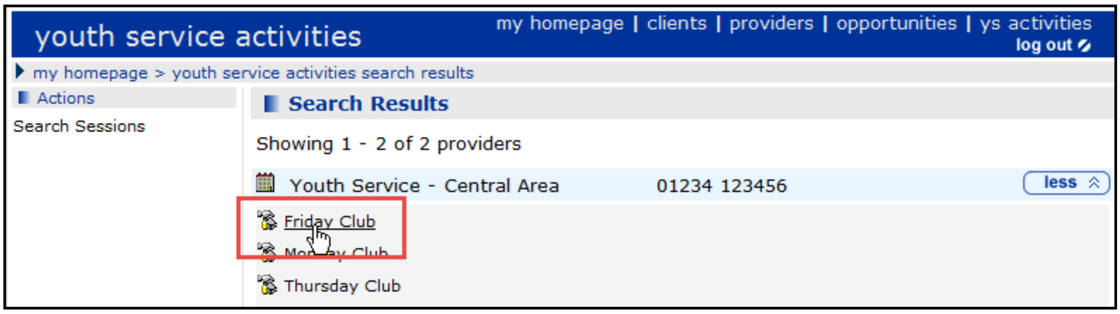
This procedure shows how to add a YS detached session. A detached session is a session that takes place in an outreach situation.

Part 1 – Session detail and attending staff

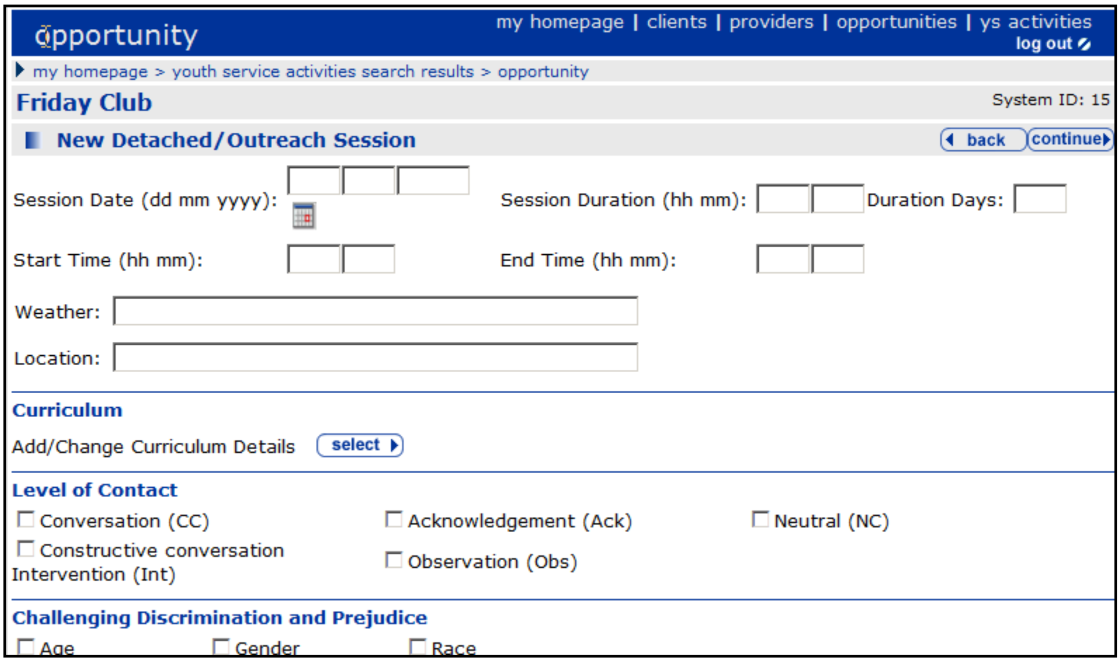
1. Click the **ys activities** link on the **My Homepage** header bar to display a list of YS service providers.



2. Click the **more** button for the provider you want to work with. A list of their activities is displayed.
3. Select the required activity to display its details.

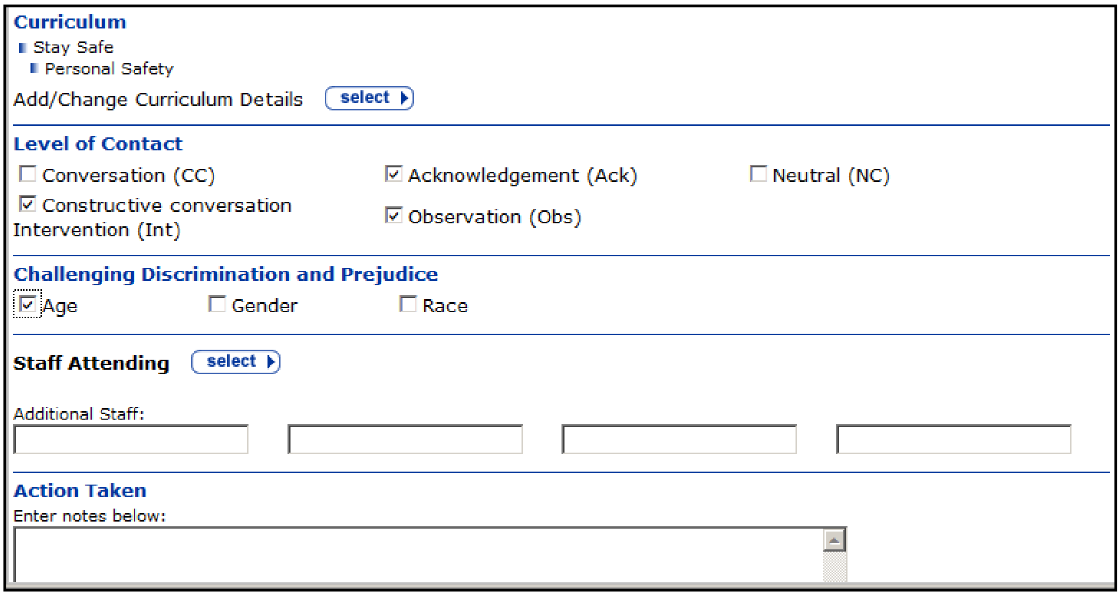


4. In the **Detached/Outreach Sessions** section, click the **new** button to display the **New Detached/Outreach Session** dialog.



5. Add a new session **date** (you can use the calendar icon to select the date).
6. Enter a **session duration** (hh mm), e.g. 01 00 and, if relevant, the number of **Duration Days.**
7. Enter a short description of the weather.
8. Enter the **Location** name.
9. In **Curriculum** panel, click the **Select** button to add curriculum details. For more information, see *Adding the curriculum details* on page *79*.

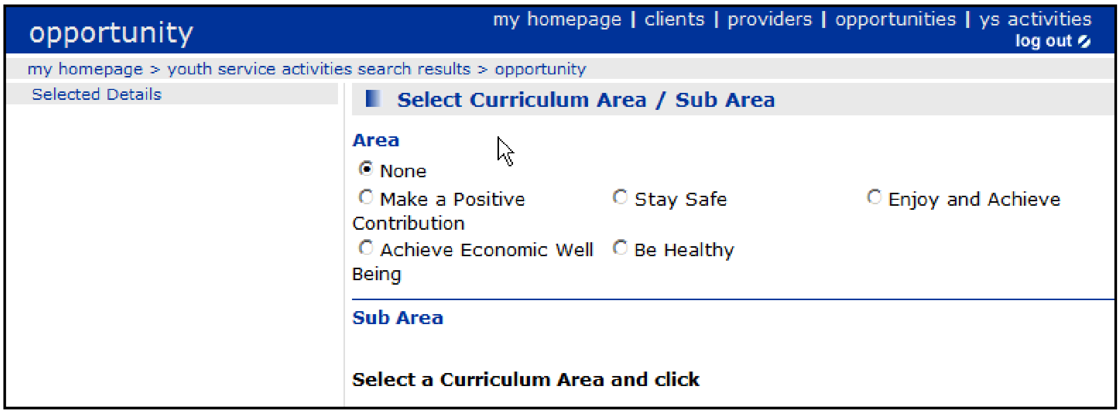
10. Select one or more **Level of Contact** options.
11. Select one or more **Challenging Discrimination and Prejudice** options.
12. Add notes in the **Action Taken** and **Follow-up** comment fields.



13. In the Staff Attending panel, click the **select** button to add staff to the session. For more information, see Select the staff who are attending on page *80*.
14. When the details are correct, click the **continue** button to display the detached session **Summary** dialog.

Adding the curriculum details

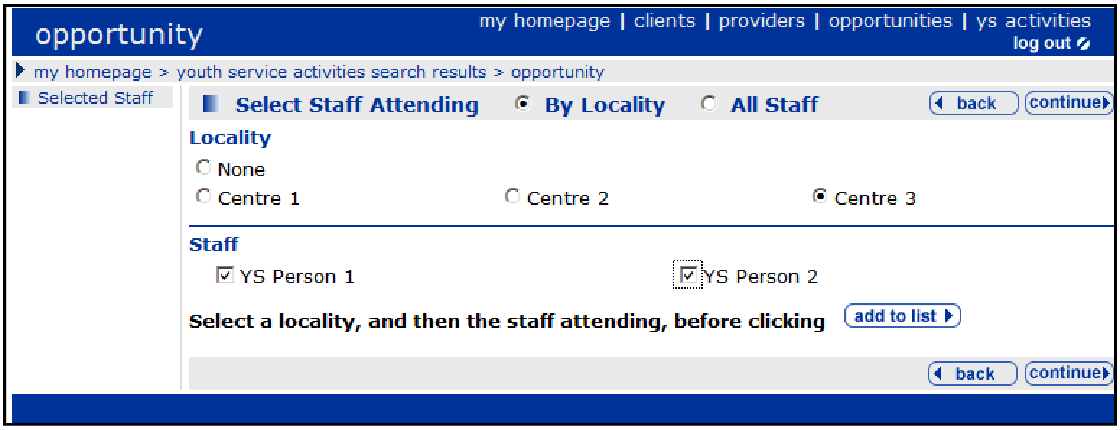
1. Click **select** in the **Curriculum** section to display the opportunity's **curriculum** dialog.



2. Select an **Area.** You can choose one or more **Sub Areas** related to your **Area** choice.
3. Click the **add to list** button. The **curriculum** and **sub curriculum** titles are displayed in the left-hand column of the screen under the **Selected Details** heading. To remove these details, click the **Remove Activity** button beside the name.
4. When the curriculum details are correct, click the **continue** button to return to the **opportunity** dialog.

Select the staff who are attending

1. In the **Staff Attending** section on the **opportunity** dialog, click the **select** button to display the **Select Staff Attending** dialog.

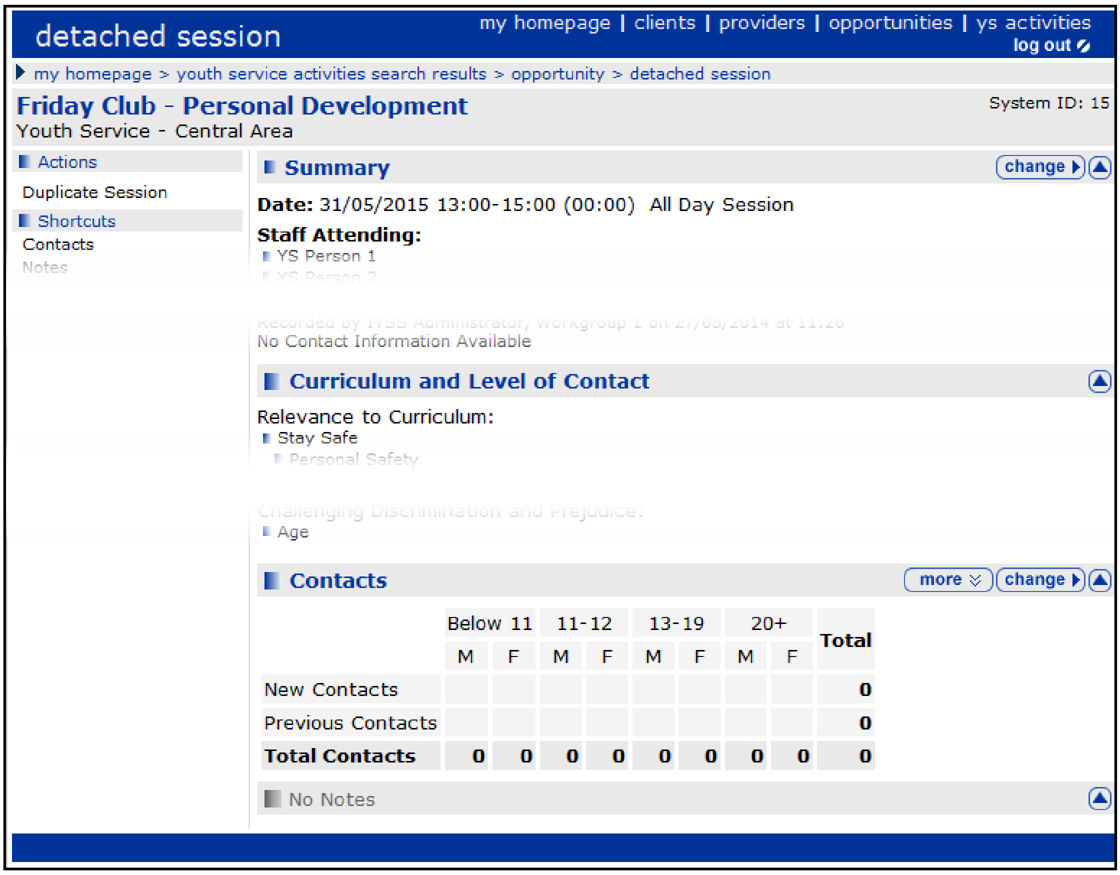


2. In the **Select Staff Attending** section, select either **By Locality** or **All Staff**: If you choose **By Locality**, only staff from that locality are available for selection.
3. In the **Staff** section, select the names who are attending and then click the **add to list** button.
4. If you selected **By Locality**, you can repeat the above steps by choosing more staff from another locality.

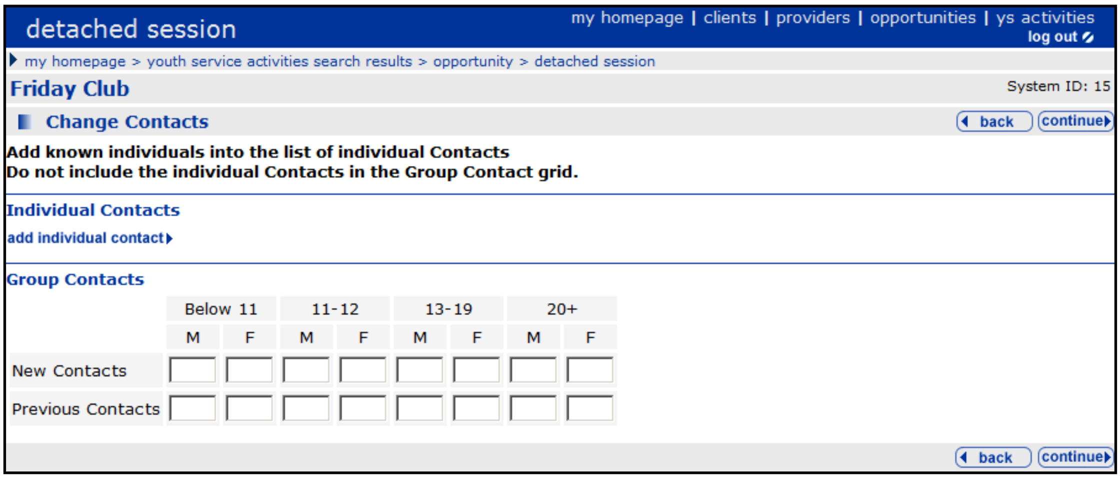
   The names of the staff attending are displayed in the left-hand column of the screen under the **Selected Staff** heading. You can remove any staff by clicking the **Remove Activity** button beside their name.
5. When you finished selecting staff, click the **continue** button to display the **New Session** screen showing details of the new session.

Part 2 – Select/change Contacts

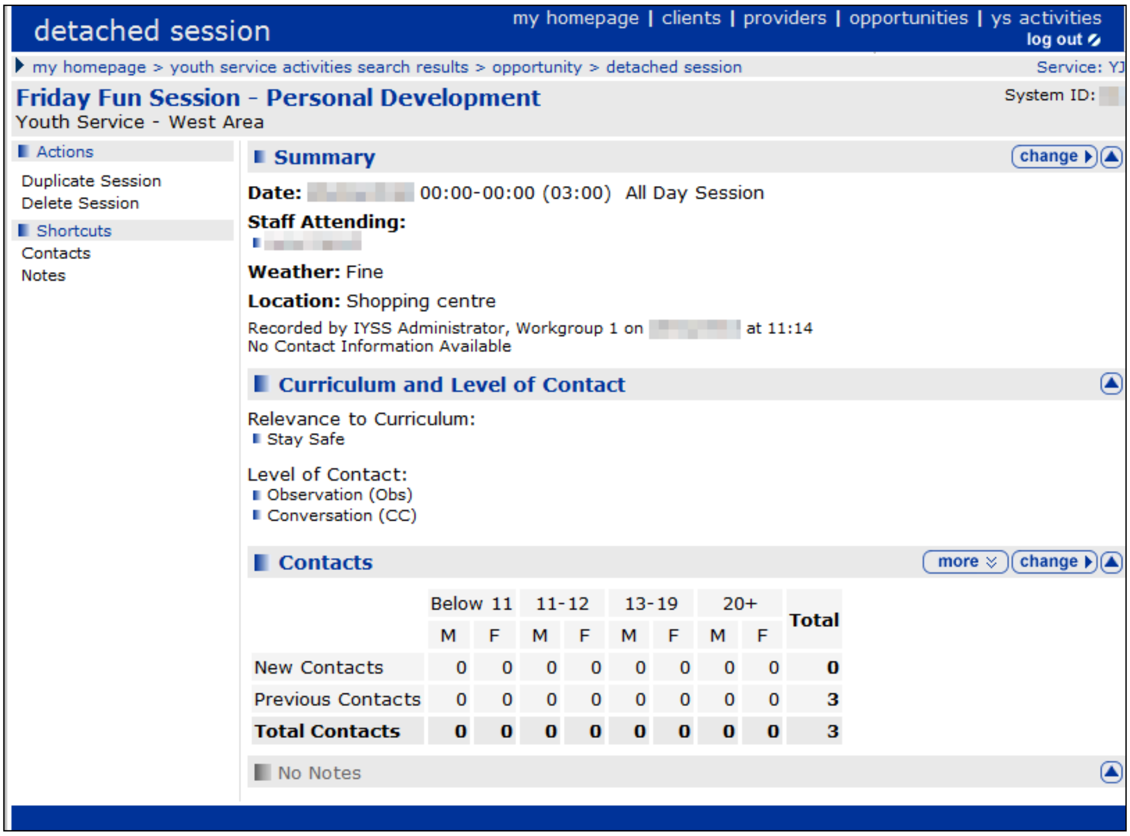
To make changes to the attendees (referred to as Contacts):



1. Click the **change** button in the **Contacts** section to display the **Change Contacts** dialog.

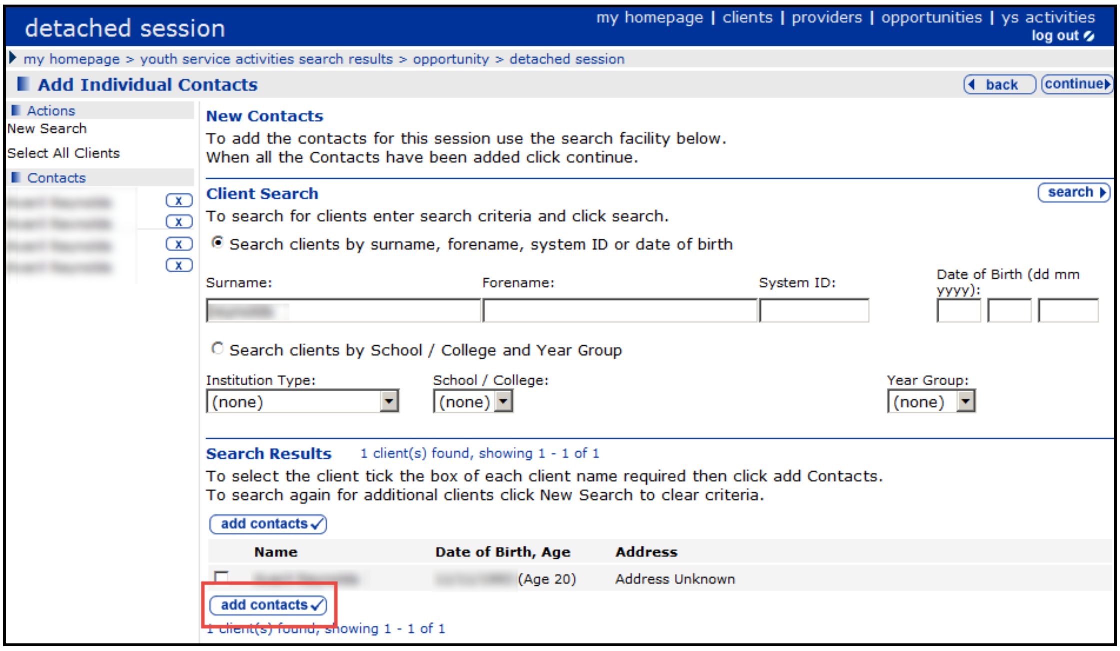


2. In the **Change Contacts** section, search for clients in the **Individual Attendees** section by clicking the **add individual contact** button to display clients who have attended before.



3. Select **Clients** who have attended a session within the last year and click the **search** button. The screen expands to show the clients who attended previous sessions.
4. Select the names of the clients you want to attend and click **Add Contacts**.
5. Click the **New Search** link in the left-hand side **Actions** panel. You can now search for an individual by entering the **Surname** and **Forename** then clicking the **search** button.

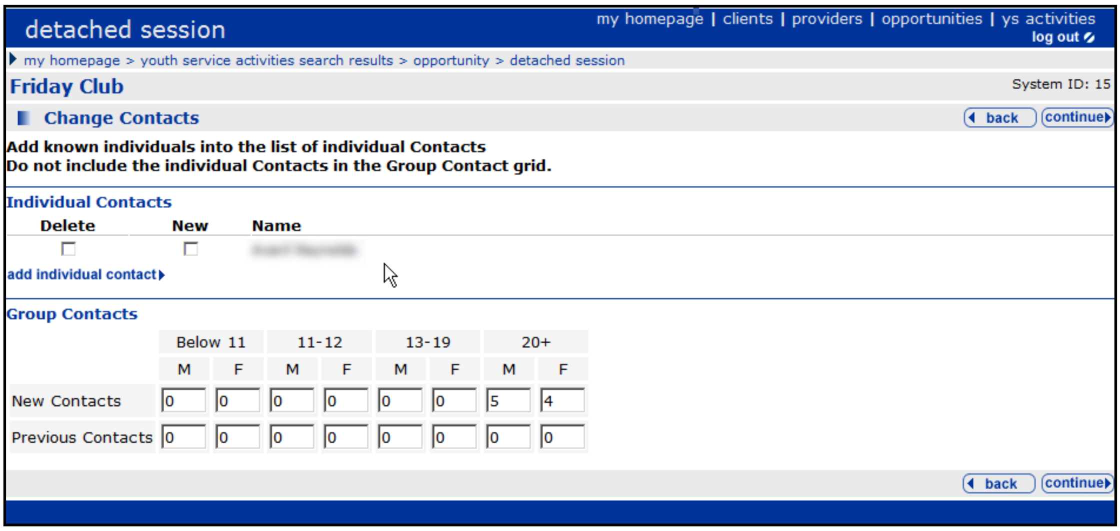
6. To select and add a client, select a client from the returned list and click the **add contacts** button.



7. The selected client is added to the **Contacts** list. If your selection is now complete, click the **continue** button.

8. The list of attendees is displayed in the **Individual Contacts** section. If they are new members, select the **New** checkbox beside their name.

9. In the **Group Contacts** section, enter the new contacts under the relevant gender and age headings.



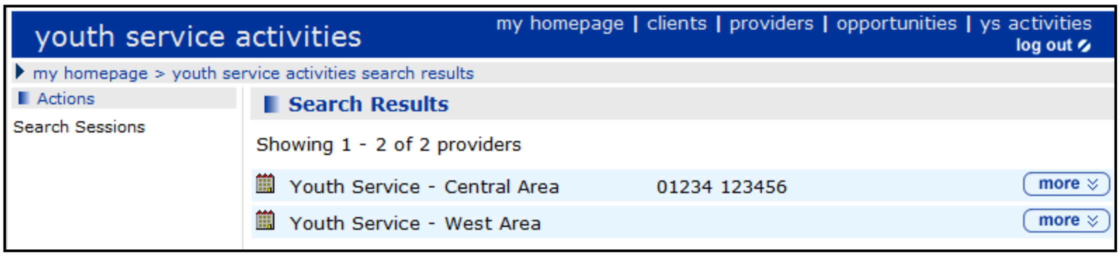
10. Click the **continue** button. The table of attendees is updated and shows individuals and the total numbers of attendees.

11. To expand the section and show more detail of the attendees, click the **more** button in the **Attendees** section. New attendees are identified by the ◆ symbol.

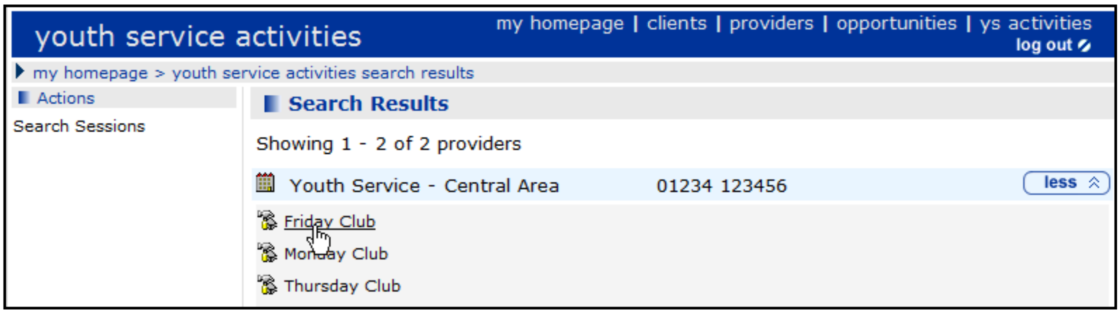
Duplicating a Detached YS Session

To duplicate a YS session:

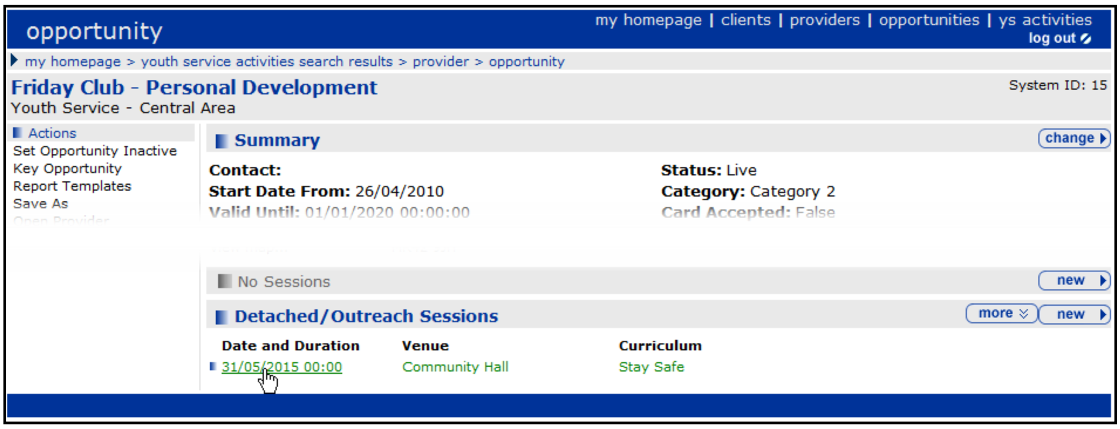
1. Click the **ys activities** link on the **My Homepage** header bar to display a list of YS service providers.



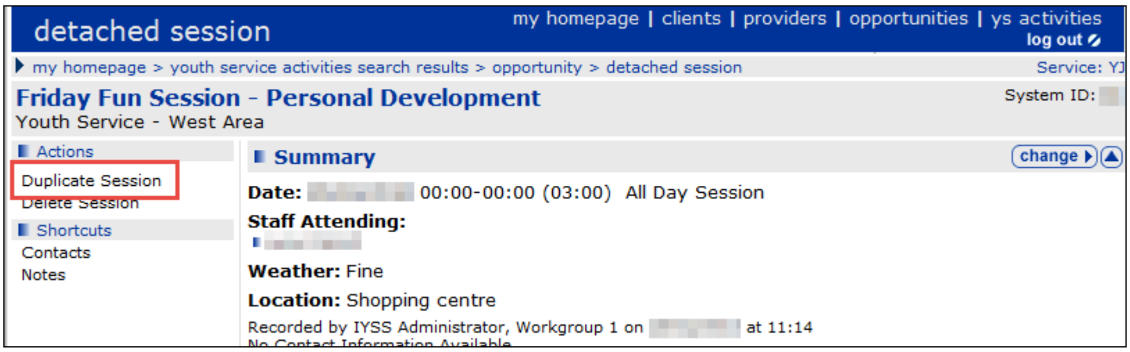
2. Click the **more** button for the provider you want to work with. A list of their activities is displayed.



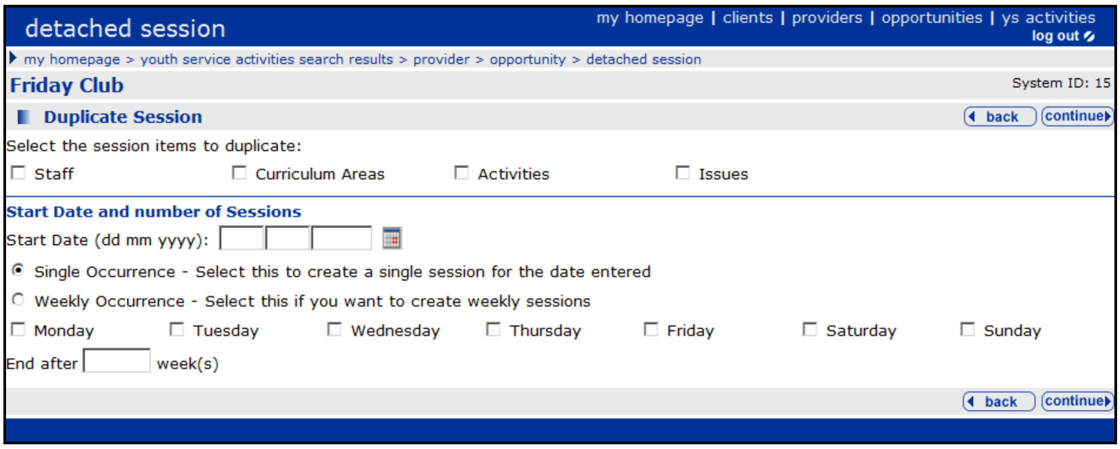
3. Select the required activity to display its details.



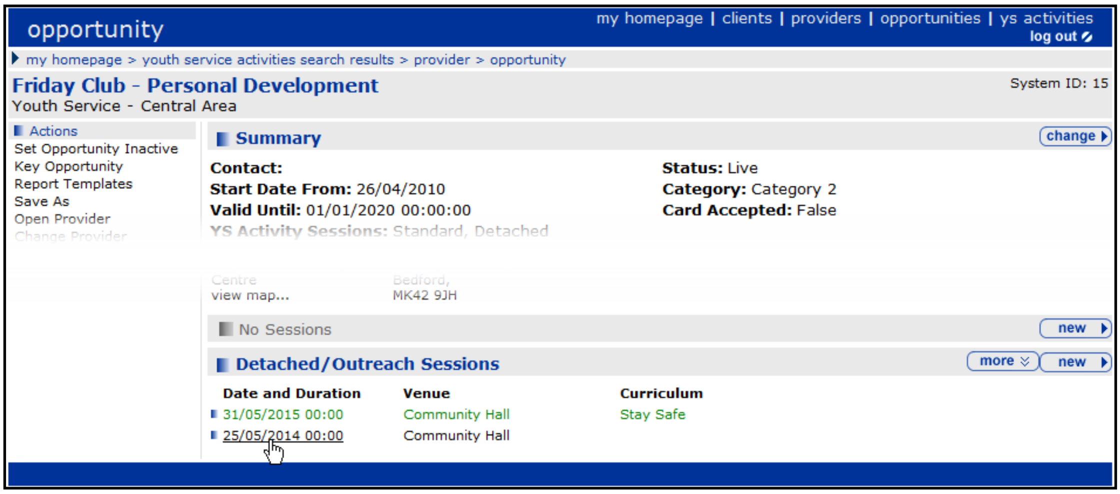
4. Click the session you want to duplicate.
5. From **Actions** in the side panel, click on **Duplicate Session**.



6. Select which items you want to duplicate into the new session, i.e. **Staff**, **Curriculum Areas**, **Activities**, **Issues**, **Attendees**.



7. Enter a **Start Date**.
8. Then either:
   a. To create <u>one</u> duplicate session, click **Single Occurrence**.
   b. To create <u>multiple</u> duplicate sessions, **Weekly Occurrence**. Select the required days of the week and **End after** a number of weeks.
9. When you have made your selection, click the **continue** button to return to your original session now showing the duplicate session.



10. Look at your **Activity** to see your future sessions which you can update as they occur.

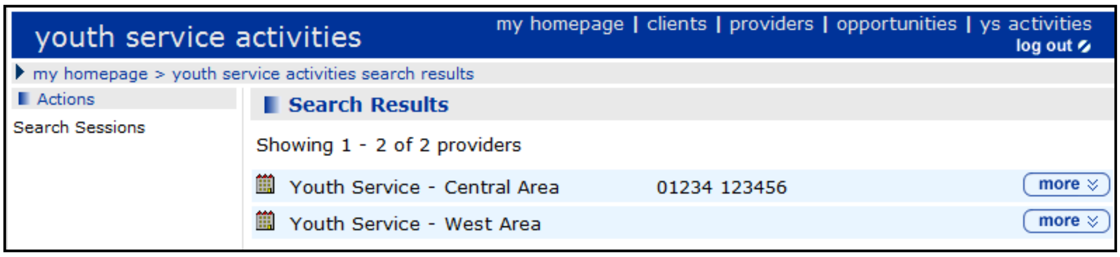
Deleting a Detached YS Session

If you have the required permissions, you can delete detached sessions.

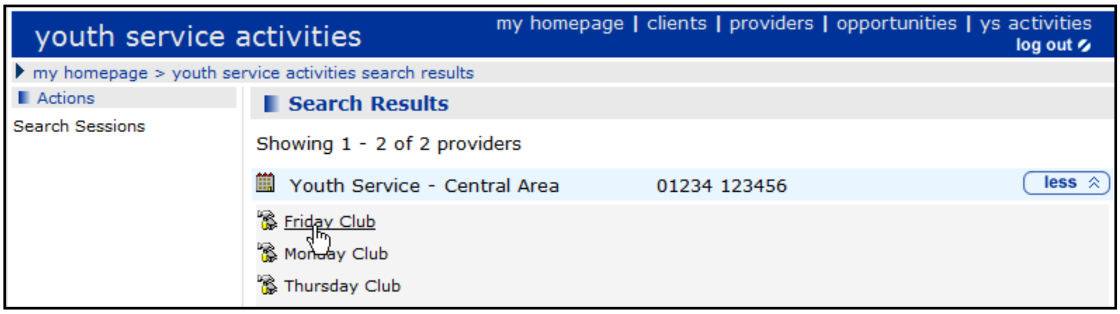
To delete a detached session:

1. Log into One IYSS.

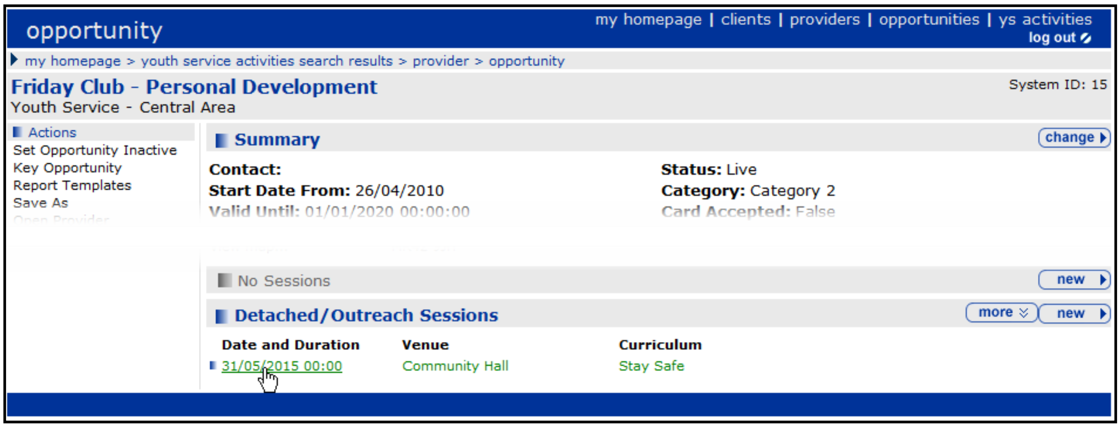
2. In the **my homepage** header bar, click the **ys activities** hyperlink to display the **youth service activities** screen.



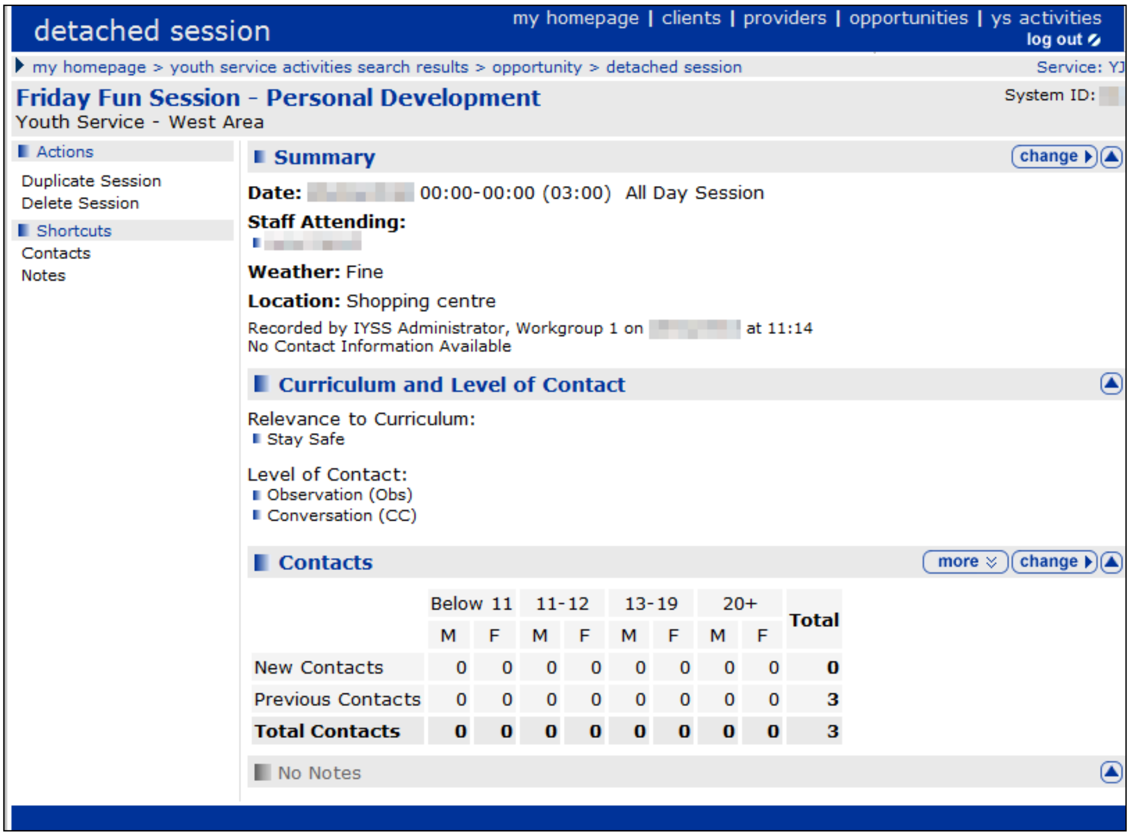
3. Click the **more** button for the appropriate provider to display a list of activities.



4. From the list, click the required activity to display the activity details.



5. In the **Detached/Outreach Sessions** table, click the **Date and Duration** of the required session to display the **Detached Session** screen.



6. In the **Actions** list, click the **Delete Session** hyperlink to display a confirmation dialog.
7. Click the **OK** button to save the changes and close the dialog.

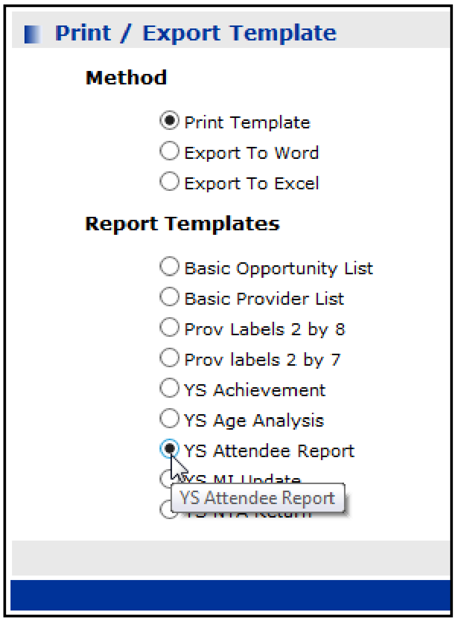
Printing a Register

To print a register:

1. In the **My Homepage** page, click on the **YS Activities** link to display a list of **YS services**.
2. Select the **YS service** you want to work with and click the **more** button to display a list of sessions for the **YS service** you have chosen.
3. Select the session you want to print a register for to display the session page.

4. From the **Actions** section in the left-hand side of the dialog, select **Report Templates.**

5. In the **Method** section of the **Print/Export Template** window, select **Print Template**.

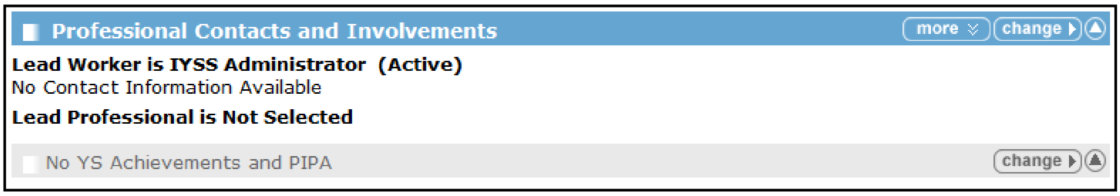


6. In the **Report Templates** section select the report you want, e.g. **YS Attendee Report**.
7. Click the **continue** button.

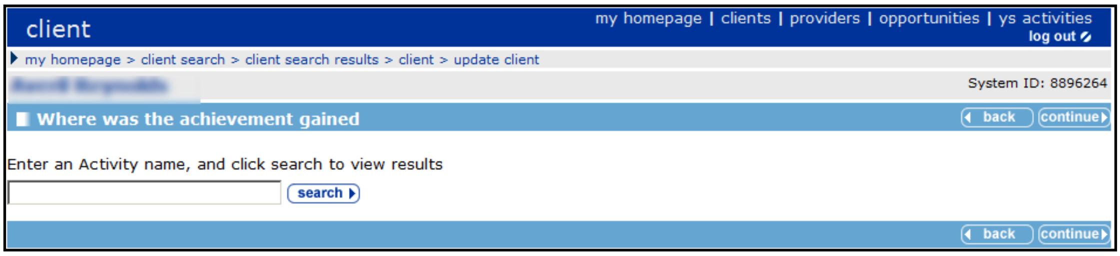
   Your report is ready to view in PDF format. You can print it or save it using the tools on the tool bar.

Adding YS Achievements

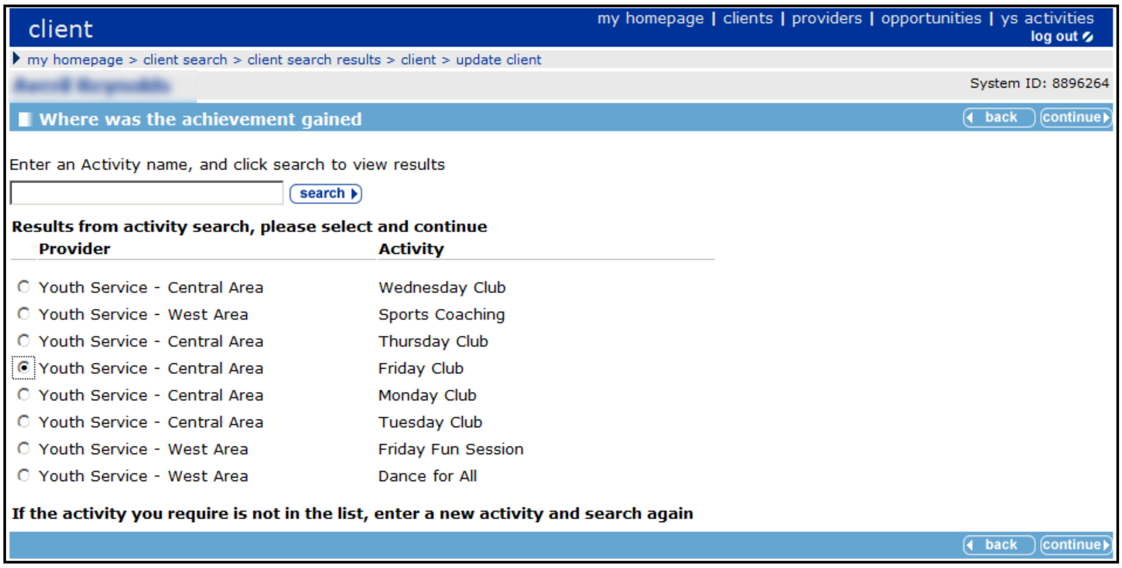
To add YS achievements to a client:



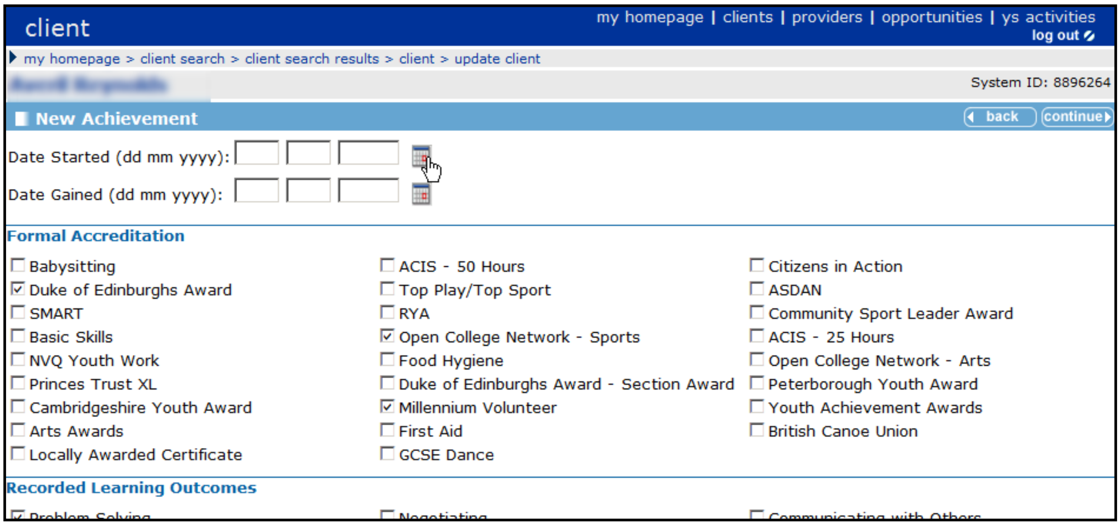
1. In the client's record, click the **change** button in the **YS Achievements** area of the **Professional Contacts and Involvements** section to display the **Change YS Achievements and PIPA** dialog.
2. Go to the **Achievements** section and click the **new achievement** link to display the **where was the achievement gained** dialog.



3. Search for the **Activity** where the achievement was gained by entering the **Activity** name.
4. Click the **search** button to display the search results.



5. Select the **Provider** and **Activity** you require, then click the **continue** button.



6. Enter the **Date Started** and **Date Gained** (if already gained). This can be completed later, if appropriate.

7. Click the **continue** button to return to the **Change YS Achievements and PIPA** dialog.

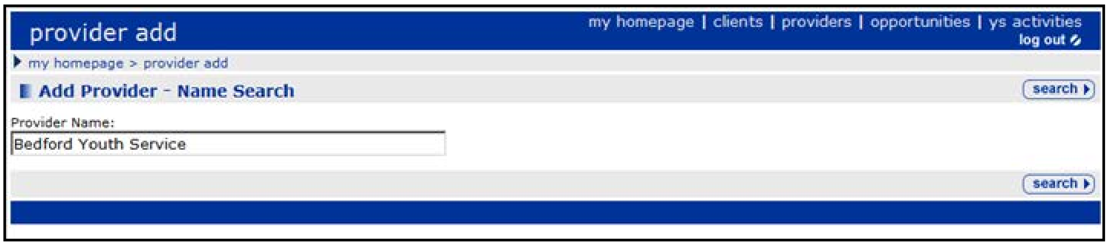
   The **Achievement** is displayed in the list which you can amend later if required.

NOTE: *This procedure can also be used from a session to add* ***Achievements*** *to multiple client records.*

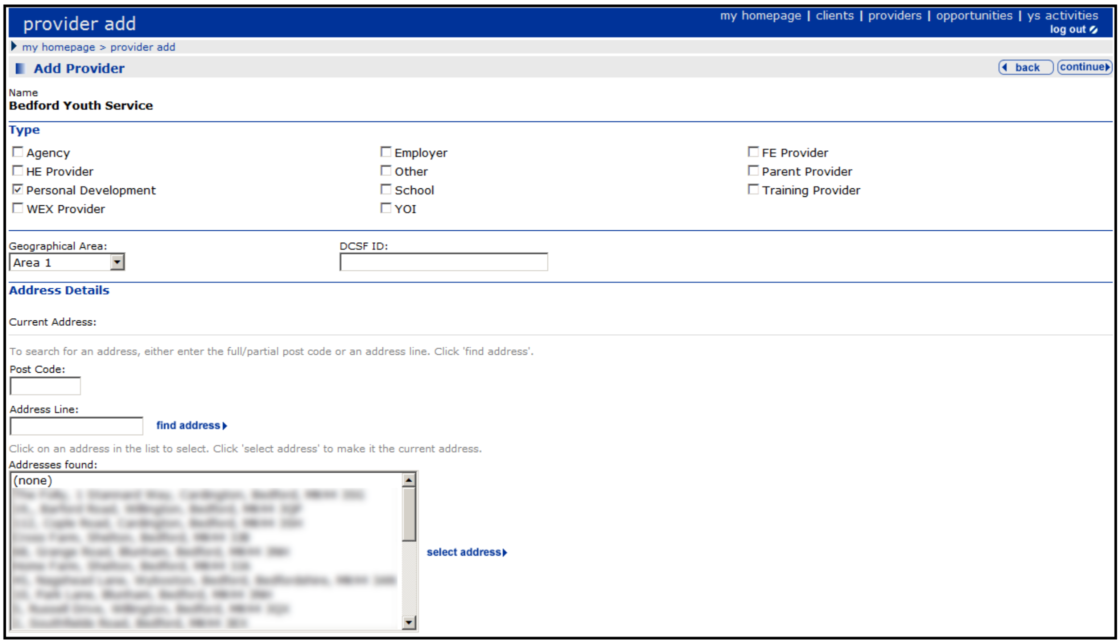
Showing a Provider under 'ys activities'

To make a provider show up under YS activities only:

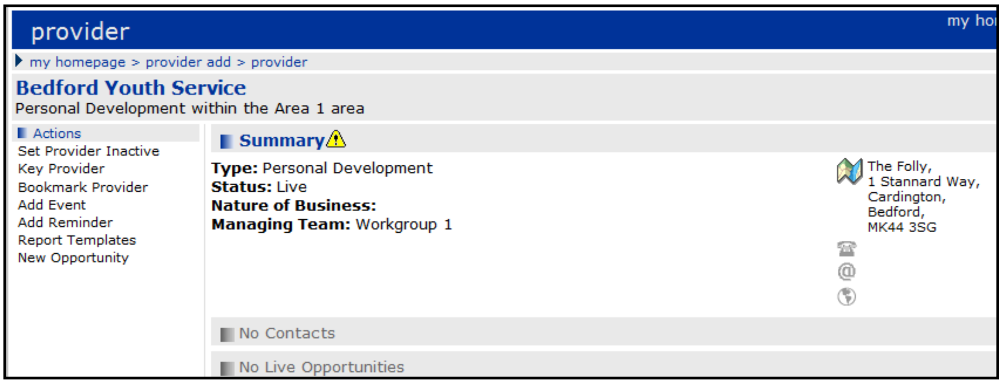
1. On **my homepage**, click **New Provider** from the **IYSS Links** panel to display the **provider add** dialog.



2. Enter the new provider's name in the **Provider Name** field, then click the **Search** button to display the **Add Provider** dialog.

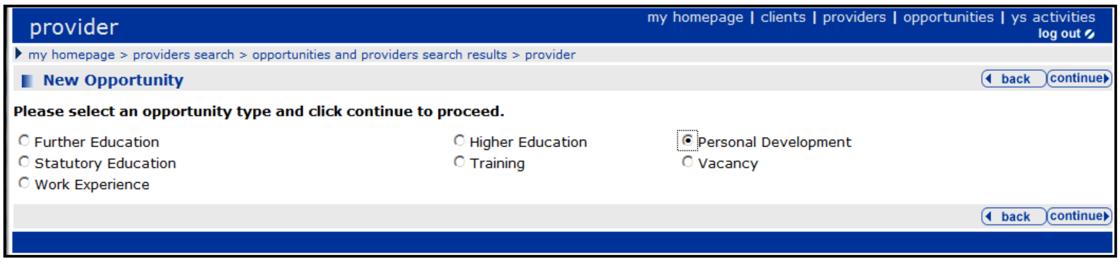


3. In the **Add Provider** dialog:
    a. Select the provider's **Type** as **Personal Development**,
    b. Select a **Geographical Area**,
    c. Enter the first part of the **Post Code** with the first number of the second part of the postcode, e.g. RG37 4
    d. Click the **Find Address** button to display addresses for this postcode.
4. In the **Addresses found** list, highlight the address you want, then click the **select address** button.
5. Enter **Contact Details** for this provider (if known), e.g. **Phone Number**, **Phone Number** 2, **Fax Number** and **Email Fields**.
6. Click the **Continue** button to display the **provider** dialog.

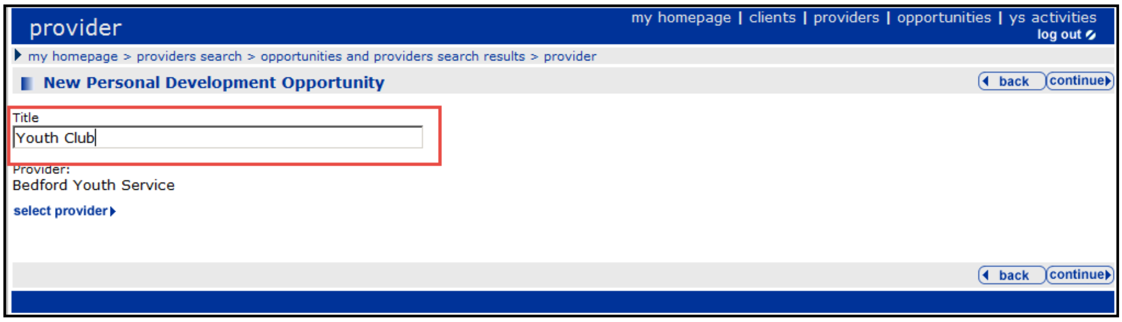


> ***NOTE:*** *A new provider has now been created. You can search and find it under* ***Providers*** *with a* ***Provider Type*** *of* ***Personal Development****. However, this will <u>not</u> show up in* ***YS activities*** *yet.*

7. On the provider page, click the **New Opportunity** link from the **Actions** link panel on the left hand side of the dialog to display the **New Opportunity** dialog.



8. In the **New Opportunity** panel, select **Personal Development**.
9. Click the **Continue** button to display the **New Personal Development Opportunity** dialog.
10. Enter a **Title** for the new opportunity, e.g. Youth Club:



11. If you want to add the opportunity to a different provider, see Optional: Adding the Opportunity to a different Provider on page *92.*

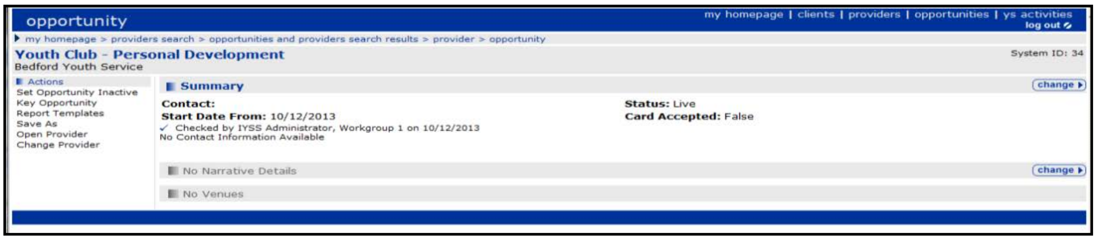
Optional: Adding the Opportunity to a different Provider

In the procedure above, a new provider was created (as a Personal Development type). If you want to add the new opportunity to a different provider, click **select provider**. Make sure you select another Personal Development provider.

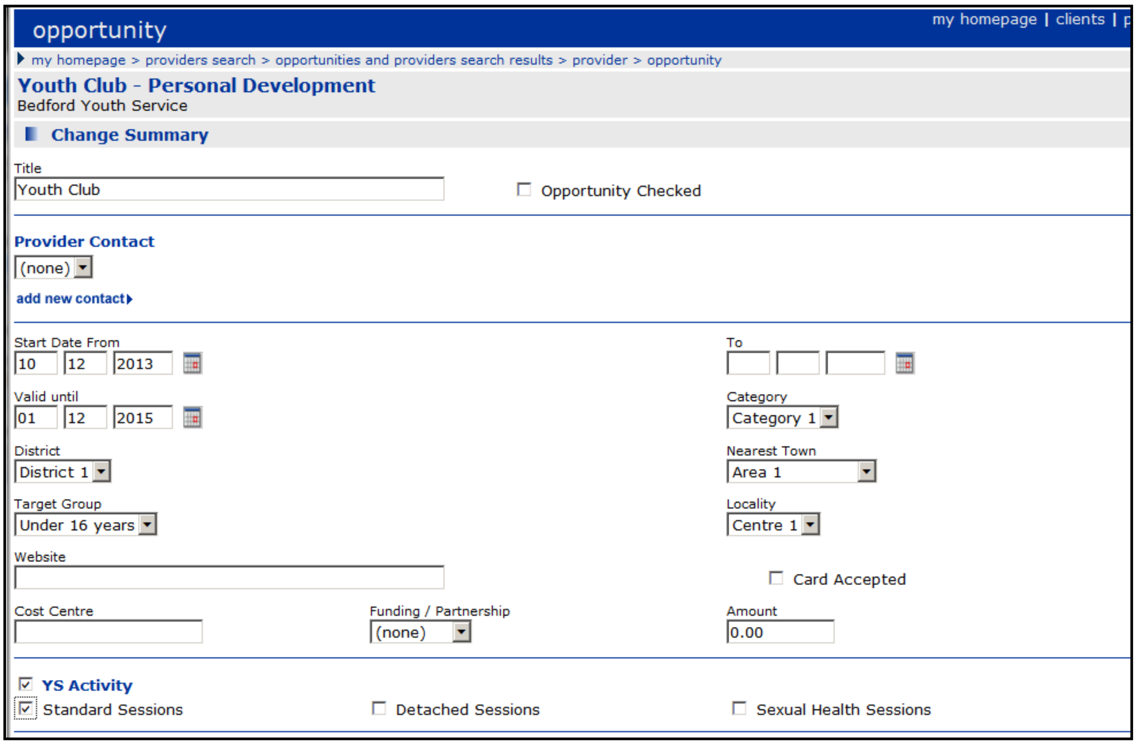
If you do not know the name of a Personal Development Provider, you can enter %% as a wildcard search in the **Title** field. However all providers will be displayed in the search results, not just Personal Development Providers.

1. Once you have entered the opportunity title for personal development provider you want, click **Continue**. OneIYSS has now created the opportunity against the Personal Development Provider.

***NOTE**: If you want to add **Narrative Details**, click the **Change** button on the **No Narrative Details** panel.*



2. To continue, click the **change** button on the **Summary** panel to display the **Change Summary** dialog.



3. Enter the mandatory fields, i.e. **Valid Until** date, **Category** and **District**.
4. Enter any optional fields, e.g. **Nearest Town**, **Target Group** and **Locality.**

5. Click the **YS Activity** checkbox and the session type you want (normally, **Standard Session**).

> ***IMPORTANT NOTE:*** *This is a crucial step in the opportunity setup, as it allows the provider to be displayed in the search results when you click* **ys activities** *in* ***my homepage*** *links.*

6. Click the **continue** button. When you click on **ys activities**, you should see the new provider is displayed in the **Search Results** dialog.

   At this stage, you can:

   - Add a new venue for the opportunity. See *Adding a YS Activity* on page *69*.
   - Add new sessions by clicking the **new** button in the **No Sessions** panel on the **opportunity** page. See *Adding Sessions to an Activity* on page *71*.

07 | Managing Caseloads

Overview

Managers can use the Caseload Management facilities to monitor and analyse the interactions the advisers they manage are undertaking. IYSS provides managers with the following case management facilities:

- Monitor their advisers' caseloads by utilising a Red, Amber, Green (RAG) analysis identifying if these advisers are appropriately utilised, over utilised or under utilised. If this feature is not required, the system can be configured to standardise these settings.
- Analyse the makeup of an adviser's caseload in regard to numbers of Intensive, Supported, Minimum and Not Determined clients.
- Analyse the contact levels being undertaken with different groups of clients.
- View client lists, providing managers with high-level information on those clients
- Open individual records for detailed analysis.
- Add 'Manager Notes' to a client's record. These notes are separate to the client's case notes and are there to assist with the supervision and/or the progression of clients.

Caseload points

The caseloads are calculated using the following points system:

- Each client is allocated points based upon their Level of Need. This applies a weighting at an individual client level to factor in those clients which would require more assistance.
- A standard number of caseload points are defined at an organisational level. This standard is then applied to all advisers. A suggested points system based on a standard caseload of 2250 points may be:
  - 75 – Intensive
  - 10 – Supported
  - 1 – Minimum & Not Determined
- A client is considered to be on a Personal Adviser's caseload where the adviser appears in the client record as their Lead Worker.
- By defaults, each member of staff has a caseload of 100%
- The **Caseload Type** assigned to a client via **Professional Contacts and Involvements | Caseload Type**, can reduce the standard points applied. For example, if the client is supported, but the **Caseload Type** is **Passive**, reducing the 10 points allowed for a supported client by 90% to allow 1 point.

The RAG analysis identifies the over and under utilisations of advisers and is definable in percentage terms by your organisation. Examples of these are:

- Under Utilisation, Red: 70% and under of caseload points used.
- Under Utilisation, Amber: 71% - 90% of caseload points used.
- Acceptable Utilisation, Green: 91% - 109% of caseload points used.
- Over Utilisation, Amber: 110% - 129% of caseload points used.

- Over Utilisation, Red: 130% and over of caseload points used.

Caseload point variations

Not every adviser or client fits the standard point allocations, therefore variations to the standard caseload points can be applied to individual clients or individual advisers.

The ability to change default client caseload points is granted via a security permission, allowing the organisation to define who has the ability to maintain this data.

Staff variations examples

- If an adviser has a caseload, but works part time or has other responsibilities, their caseload points can be reduced accordingly. For example, for an advisor only working 2.5 days a week, you can reduce their caseload points by 50%..
- If an adviser is allocated as the lead worker to many clients, but is not likely to have active contact with these clients (a college for instance), their caseload points can be increased to ensure that are not deemed as being over utilised for example to 150%.

Client variations examples

- If a client is deemed to be particularly hard to help and requires a higher level of support, the default caseload points for this client can be made higher.
- If a client is not receiving the full support normally required for their level the caseload points can be lowered. This might be applicable for an intensive client, but for who another organisation is taking the lead.

Assigning Advisers to Managers

Each manager defines which advisers are under their charge. Users can be assigned to more than one manager.

To assign a user to a manager:

1. In the **IYSS Links** panel on the homepage, click the **Assign Users to Manager** hyperlink to display the **Change My PAs** page.
2. Select the check boxes for the users you wish to manage.
3. Click the **Continue** button to save the changes. You are returned automatically to **my homepage**.

Removing Advisers from Managers

Each manager defines which advisers are under their charge.

To remove a user from a manager:

1. In the **IYSS Links** panel on the homepage, click the **Assign Users to Manager** hyperlink to display the **Change My PAs** page.
2. In the **My Lead Workers** panel, select the check boxes for the users you wish remove from your remit.
3. Click the **Continue** button to save the changes. You are returned automatically to **my homepage**.

Viewing Caseload Management data

At team level, caseload management data can be analysed by level of need or case load type. You can view additional information for each of your advisors and view their caseloads by interview or caseload type.

Navigation
- My Aspire

Analysis By
- Level Of Need
- Case Load Type

Caseload Summary By Level Of Need

Manager: Lynn Beardsmore			Intensive Support		Supported		Minimum Intervention		Not Determined	
Lead Worker	Utilisation	Total	%	No.	%	No.	%	No.	%	No.
Daniel Foster (100%)	128%	20	45%	9	20%	4	25%	5	10%	2
Bridget Handsworth (100%)	312%	136	66%	90	18%	24	16%	22	0%	0
Chris Mann (100%)	User is very over utilised	28	36%	10	18%	5	46%	13	0%	0
Elaine West (100%)	142%	92	42%	39	27%	25	27%	25	3%	3
Total		276	54%	148	21%	58	24%	65	2%	5

Regardless of how the data is analysed, the following information is displayed:

- The percentage of a standard caseload that a member of staff is allocated (set in their user account):

  Chris Mann (100%)

- A tool tip on the RAG (red, amber, green) rating given to each staff member:

  Chris Mann (100%) User is very over utilised

To view advisor caseload data:

1. In the **IYSS Links** panel on the homepage, click the **Caseload Management** hyperlink to display the **Caseload Summary By Level of Need** page.

Navigation
- My Aspire

Analysis By
- Level Of Need
- Case Load Type

Caseload Summary By Level Of Need

Manager: Lynn Beardsmore			Intensive Support		Supported		Minimum Intervention		Not Determined	
Lead Worker	Utilisation	Total	%	No.	%	No.	%	No.	%	No.
Daniel Foster (100%)	128%	20	45%	9	20%	4	25%	5	10%	2
Bridget Handsworth (100%)	312%	136	66%	90	18%	24	16%	22	0%	0
Chris Mann (100%)	User is very over utilised	28	36%	10	18%	5	46%	13	0%	0
Elaine West (100%)	142%	92	42%	39	27%	25	27%	25	3%	3
Total		276	54%	148	21%	58	24%	65	2%	5

2. To analyse the information based on caseload type, click the **Case Load Type** hyperlink in the **Analysis By** panel.

3. To view more information about a specific advisor, click their name to display the **Lead Worker Caseload Details By Interview** page.

PA Caseload Details

PA: Steve Perrett	Clients		Not Yet Interviewed		With Interview in the last month		Without Interview in the last month	
Level of Need	%	No.	%	No.	%	No.	%	No.
Intensive Support	46%	24	0%	0	0%	0	100%	24
Minimum Intervention	13%	7	0%	0	0%	0	100%	7
Supported	40%	21	0%	0	0%	0	100%	21
Total		52	0%	0	0%	0	100%	52

a. To analyse the information based on caseload type, click the **Caseload Type** hyperlink in the **Analysis By** panel.

b. To view a list of clients associated with the advisor, click the number entered in the required **No.** column to display the **Client Summary** page. You can click on an individual client's name to display their client record.

Client Summary

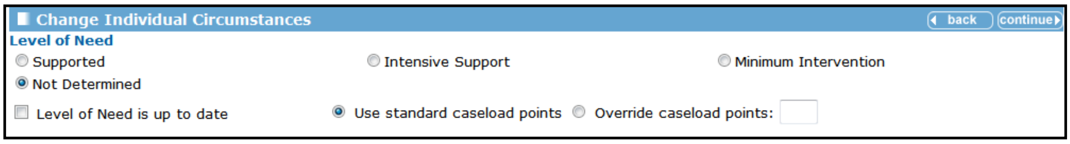
PA: Steve Perrett	Intensive Support Clients without Interview in the last month				
Client	Situation	Time on C/L	SEN Status	Ind Circs	Last Contact
Hisham Awar	NEET, Seeking-No job Opps	86 days	LDD Not Statemented	1	Client Update on 27/08/2008
Ryan Bashford	No Information, Cannot Be Contacted	86 days	No LDD	0	
Sera Bennett	Other, Part Time Emp	86 days	No LDD	0	

Changing a Client's Caseload Points

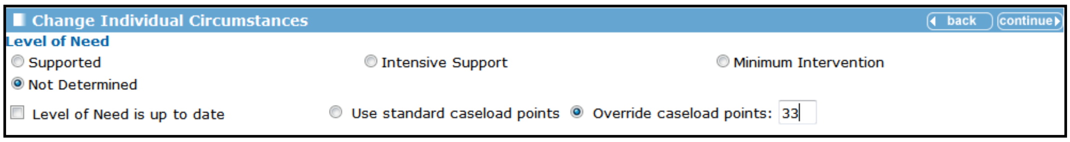
If it is determined that a client should not follow the usual weightings for caseload points, the caseload points can be adjusted. To adjust caseload points, you must have Client Caseload Points Change security privilege assigned.

> **More Information:**
>
> *Security Group* topic in the *Functions* chapter of the *One IYSS System Administration handbook (Part 1)* available from www.onepublications.com

1. Open the client record for which you want to change the caseload points allocation. For more information on opening a client record, see Searching for and viewing a single client record on page *8*.
2. In the **Individual Circumstances** panel, click the **change** button to display the **Change Individual Circumstances** page.



3. Select the **Override caseload points** radio button and enter a new points value.

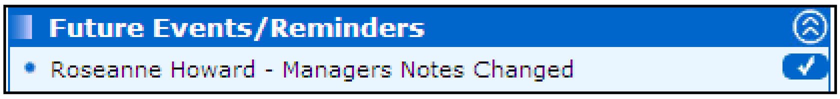


4. Click the **continue** button to save the change and return to the client record.

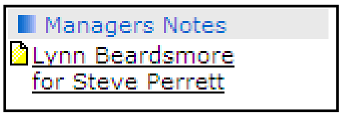
Adding Manager Notes

When reviewing individual client cases, managers are able to add notes to the client's records for the advisers to pick and follow. These are specific manager notes which are not subsumed or displayed in the client interactions. Only the manager who added the note and the user who was the Lead Worker at the time the note was added can view the notes. If the Lead Worker is changed, the notes are not visible to the new Lead Worker.

When a user has a new note added to a client, the next time they accesses My Homepage, they will see a reminder that a manager's note has been added in their Future Event/Reminders panel.



When an Adviser opens a client record where Manager Notes have been added for them, the notes will appear as a link and can be added to*.*

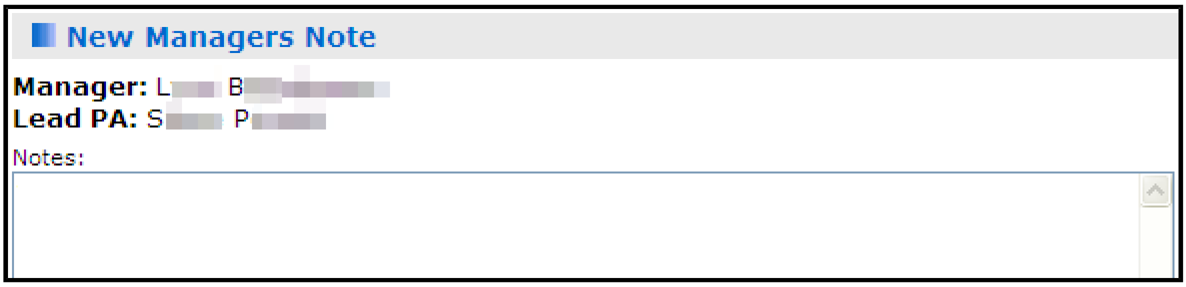


The Manager will also receive a Future Event/Reminder when a user responds to the note.

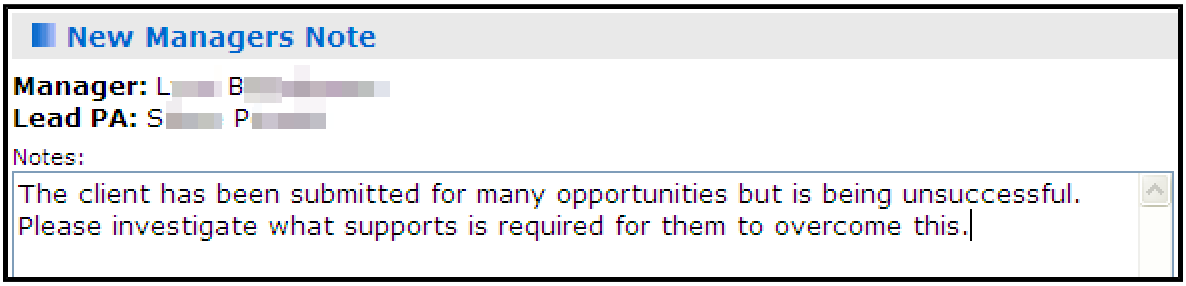
To add a manager note to a client record:

1. Open the client record to which you want to add a manager's note. For more information on opening a client record, see Searching for and viewing a single client record on page *8*.

2. In the **Actions** menu, click the **Add Manager's Note** hyperlink to display the **New Managers Note** page.



3. Enter the required information in the **Notes** field.



4. Click the **continue** button to save the message.

My Caseload Tool

The My Caseload tool enables Lead Workers to:

- Analyse the makeup of their caseload in regard to numbers of Intensive, Supported, Minimum and Not Determined clients.
- Analyse the contact levels being undertaken with different groups of clients.
- View client lists for high-level information on those clients.
- Filter by situation group and SEN status.
- Open individual records for detailed analysis.

By default, caseload data is analysed by Level of Need, but it can also be analysed by Caseload Type.

Caseload Summary By Level Of Need

		Intensive Support		Supported		Minimum Intervention		Not Determined	
Lead Worker	Total	%	No.	%	No.	%	No.	%	No.
Duncan McMaster (100%)	14	7%	1	43%	6	36%	5	14%	2
Total	14	7%	1	43%	6	36%	5	14%	2

Analysis by Level of Need

Lead Worker Caseload Details by Caseload Type

Lead Worker: Mary Peacock	Clients		Active		Passive	
Level of Need	%	No.	%	No.	%	No.
Supported	9%	81	9%	81	0%	0
Intensive Support	4%	32	4%	32	0%	0
Minimum Intervention	12%	109	12%	109	0%	0
Not Determined	75%	653	75%	653	0%	0
Total		875	100%	875	0%	0

Analysis by Caseload Type

Viewing Caseload Management Data

To view caseload management data using the My Caseload Tool:

1. In the **IYSS Links** panel on the homepage, click the **My Caseload Tool** hyperlink to display the **Caseload Summary By Level of Need** page.

Caseload Summary By Level Of Need									
		Intensive Support		Supported		Minimum Intervention		Not Determined	
Lead Worker	Total	%	No.	%	No.	%	No.	%	No.
Duncan McMaster (100%)	14	7%	1	43%	6	36%	5	14%	2
Total	14	7%	1	43%	6	36%	5	14%	2

2. To analyse the data by caseload type, click the **Caseload Type** hyperlink in the **Analysis By** panel.

Lead Worker Caseload Details by Caseload Type						
Lead Worker: Mary Peacock	Clients		Active		Passive	
Level of Need	%	No.	%	No.	%	No.
Supported	9%	81	9%	81	0%	0
Intensive Support	4%	32	4%	32	0%	0
Minimum Intervention	12%	109	12%	109	0%	0
Not Determined	75%	653	75%	653	0%	0
Total		875	100%	875	0%	0

3. To view an analysis of contact activity, click on your name to display the **Lead Worker Caseload Details by Interview** page.

Lead Worker Caseload Details by Interview								
Lead Worker: Duncan McMaster	Clients		Not Yet Interviewed		With Interview in the last month		Without Interview in the last month	
Level of Need	%	No.	%	No.	%	No.	%	No.
Supported	43%	6	50%	3	0%	0	38%	3
Intensive Support	7%	1	0%	0	0%	0	13%	1
Minimum Intervention	36%	5	33%	2	0%	0	38%	3
Not Determined	14%	2	17%	1	0%	0	13%	1
Total		14	43%	6	0%	0	57%	8

   a. To analyse the information based on caseload type, click the **Caseload Type** hyperlink in the **Analysis By** panel.

   b. To view a list of clients associated with you, click the number entered in the required **No.** column to display the **Client Summary** page. You can click on an individual client's name to display their client record.

Client Summary						
Lead Worker: Duncan McMaster	**All Supported Clients**					
Client	Situation	Time on C/L	SEN Status	Ind Circs	Last Contact	IV's In Last Month
Corey Mcmaster	NEET, Seeking Employment or Training	448 days	School Action	0	PA Interview on 02/03/2010	0
Samantha Mcmaster	NEET, Seeking Employment or Training	448 days	No LDD	0	PA Interview on 02/03/2010	0
Katie Brown	Statutory Education at Coundon Court School and Community College, Year 10	384 days	No LDD	0	Group Session on 24/12/2010	0
Jean Grey	Statutory Education at Alcester Grammar School, Year 11	28 days	No LDD	0		0
Reid Richards	Statutory Education at Alcester Grammar School, Year 11	28 days	No LDD	0		0
Ben Shaw	Statutory Education at Alcester Grammar School, Year 11	28 days	No LDD	0		0

08 | Appendix – System Administrator

Bulk Updating Client Records to IYSS

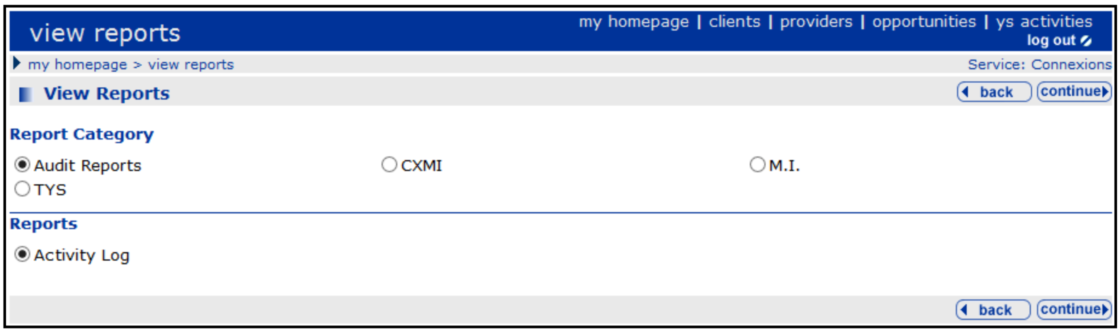
> ***NOTE:*** *The bulk update function requires appropriate OneIYSS permission and is normally done by a system administrator. The update is normally done annually to bring year groups into OneIYSS as required.*

To open a client record in OneIYSS the record must an IYSS client, i.e. marked as **IYSS**. You can update **Non IYSS Client** records to **IYSS Client** records:

- on an individual basis (see Updating a Non IYSS Client on page *15*) or
- on a bulk update process which updates each school. The **IYSS Bulk Updates** report shows which schools and year groups have been marked as **IYSS**.

Reviewing the IYSS Bulk Updates Report

1. Select **My Homepage | IYSS Link | View Reports** to display the **View Reports** dialog**.**
2. Select **Audit Reports** from the **Report Category** and **Activity Log** from the **Reports** section.



3. Click the **continue** button to display the **View Report – Activity Log** dialog.
4. Select **IYSS Bulk Updates**.
5. Select the **Year Group** that you want to check for student records not yet made into IYSS records.
6. Click the **continue** button to finish.

Bulk Updating Student Records to IYSS Records

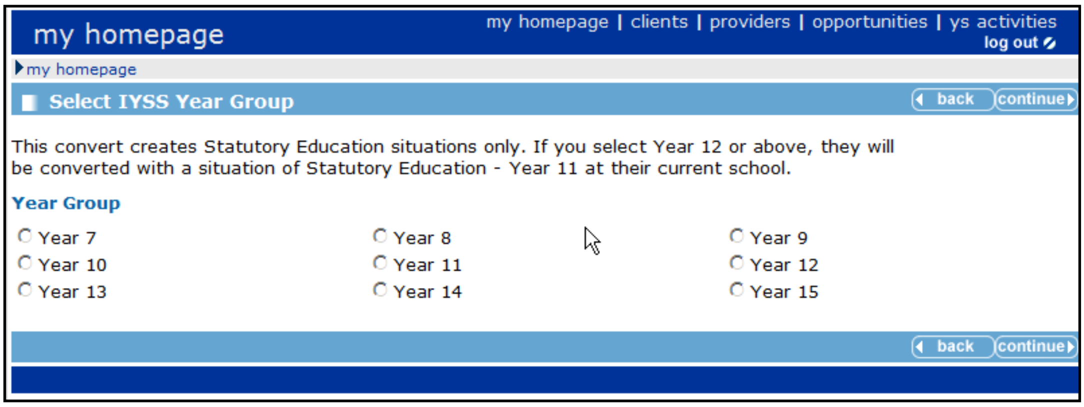
The **Update IYSS Year Groups** routine enables multiple schools for a single year group to be updated at a single session.

When searching for clients to update, only those who meet the following criteria are included:

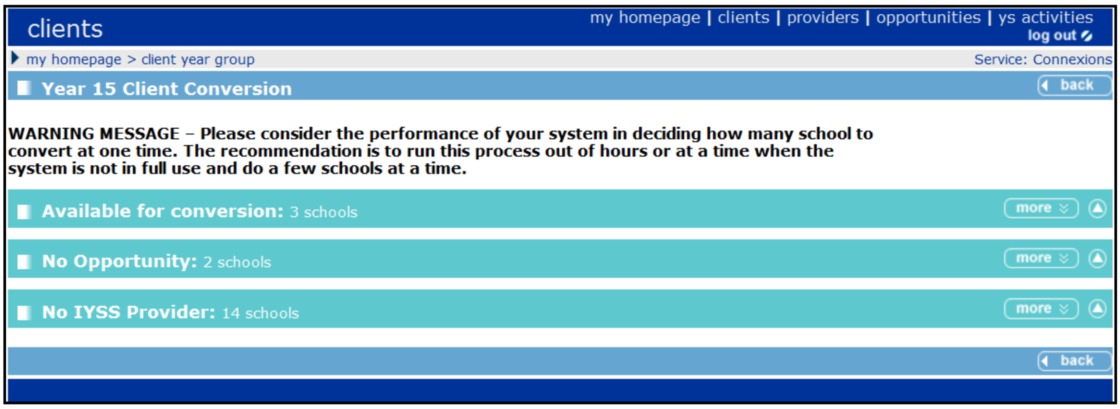
- DoB matches the selected statutory year group.
- Have an educational Activity with the selected school in One with a start date in the current academic year.
- Not marked as IYSS.

> ***IMPORTANT NOTE:*** *Bulk updating student records to IYSS records is a resource intensive process and performance depends on the capability of your system.*

1. Select **My Homepage | IYSS Link | Update IYSS Year Groups** to display the **Select IYSS Year Group** dialog.



2. Select the **Year Group** that you want to mark as IYSS.
3. Click the **continue** button to display the **Year** xx **Client Conversion** dialog.

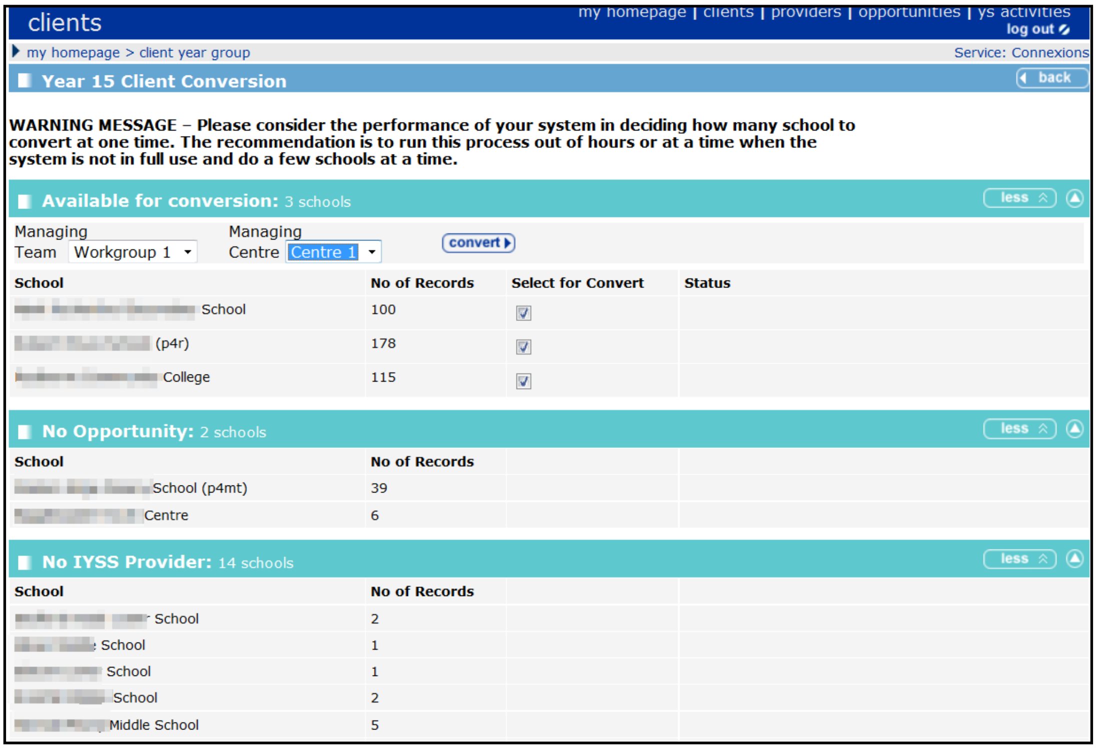


- **Available for Conversion** panel: Displays all clients that belong to the selected year group when the school (i.e. provider) and opportunities are in place on OneIYSS to allow conversion to take place.
- **No Opportunity** panel: Displays a list of schools (i.e. IYSS providers) where opportunities do not exist and therefore cannot be converted.
- **No IYSS Provider** panel: Displays a further list of schools (which are not currently IYSS providers) that have clients for conversion, but as the school does not use IYSS, these schools need to be converted to become providers and then opportunities added to them.

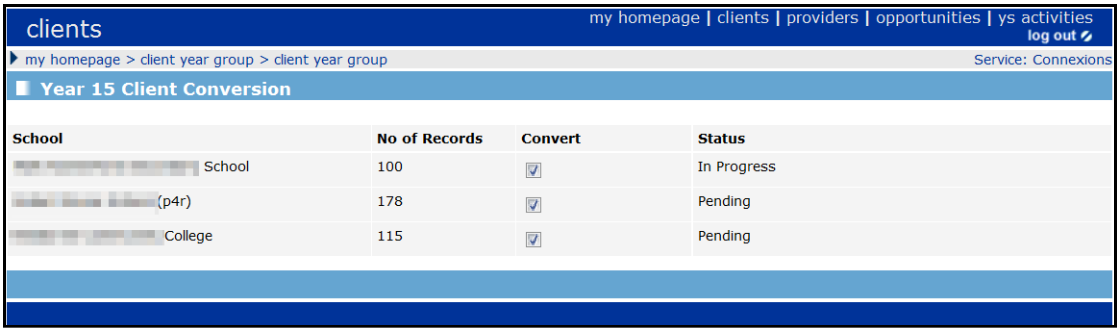
4. In the **Available for Conversion** panel, click the **more** button to display:
   - Schools that can be converted, and
   - Schools that may be eligible but either do not have appropriate opportunities or the school (IYSS provider) has not been converted for use in IYSS.

   Once the schools have been converted and opportunities added, they are available for conversion.
5. Choose the **Team** and **Centre** to be allocated to the **Schools** you have selected for update.

6. Select the **Schools** you want to convert and then click the **convert** button to start the bulk update process.



The **Status** column displays the stage at which the conversion process is running, e.g. Pending, In Progress etc.



Recording Youth Contract Interactions

This procedure describes how to record Youth Contract interactions with clients on the **Interactions and Communications** panel of the client record.

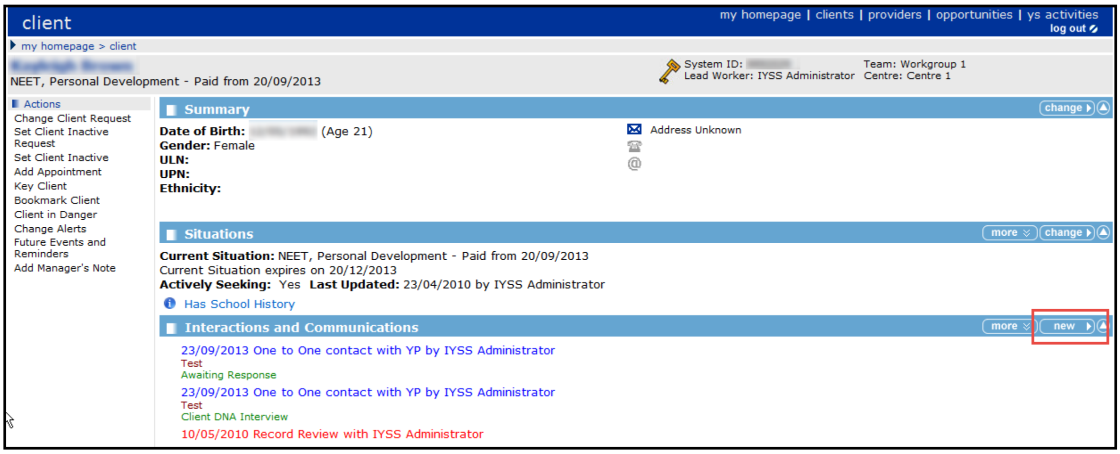
Before you start:

Make sure the following has been done in the OneIYSS system administration module:

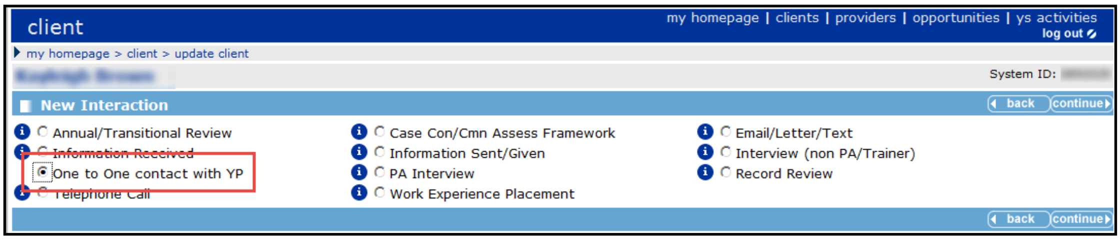
1. Add **Situation Sub Groups** and link to **Situation Group of Youth Contract**.
2. Link the **Youth Contract Situation Group** in **Situation Super Groups** to **Secondary**.
3. To capture additional data for **Youth Contract**, go to the **Client/Project of Youth Contract** area and link the following to the appropriate **Interaction Types**:
   - **Youth Contract – Join**
   - **Youth Contract – Leave**

- **Youth Contract – Change Interaction Activities**.

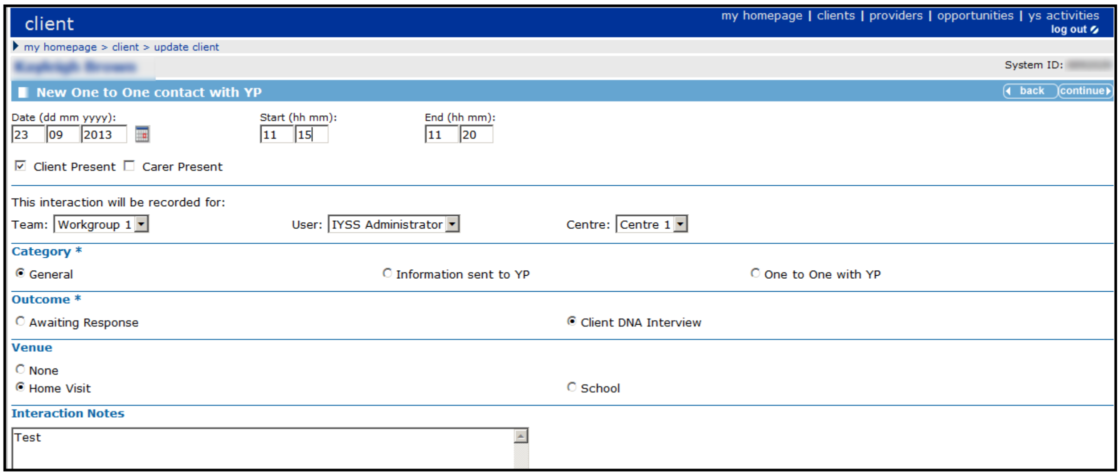
Recording Youth Contract Interactions



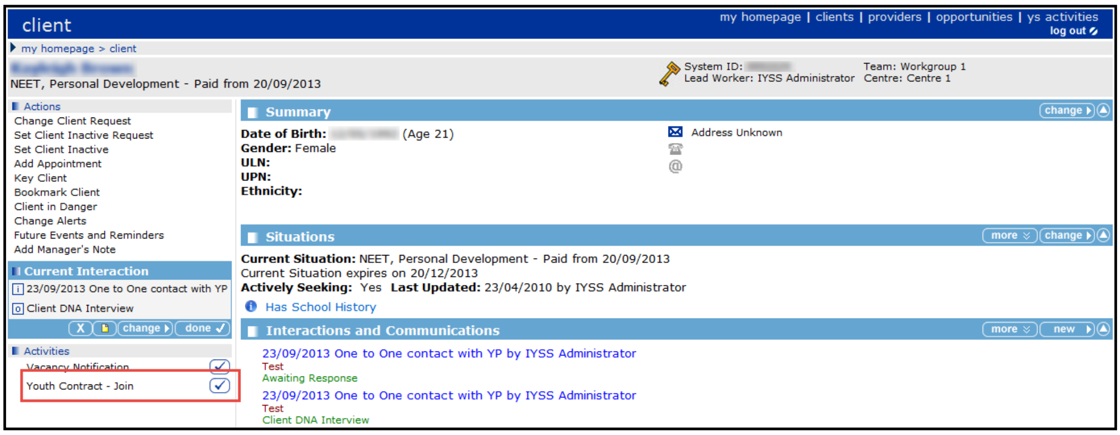
1. In the client's record, go to the **Interactions and Communications** panel, then click the **new** button to display the **New Interaction** dialog.



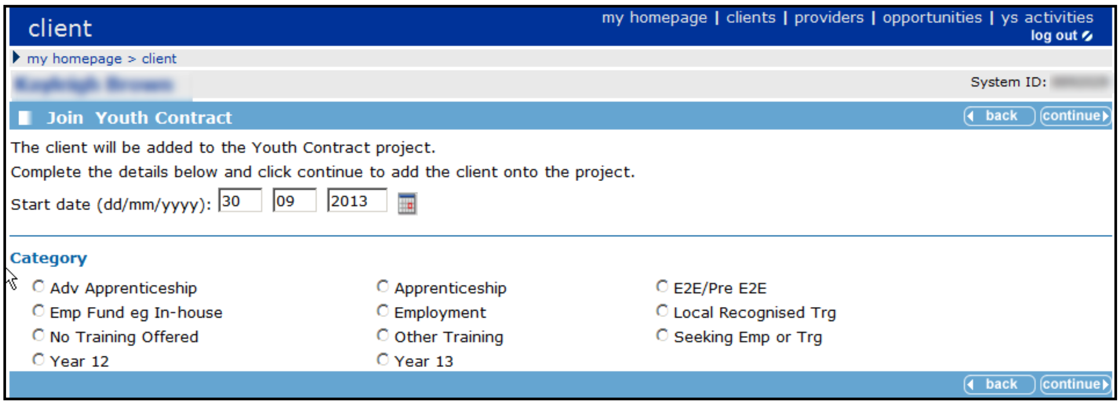
2. Select **One to One Contact with YP**. Then click the **continue** button to display the **New One to One contact with YP** dialog.
3. Enter the relevant information for the interaction as shown in the screenshot below.



4. Click the **continue** button to display the client record which shows the **Youth Contract – Join** link in the **Activities** panel on the right-side of the dialog.

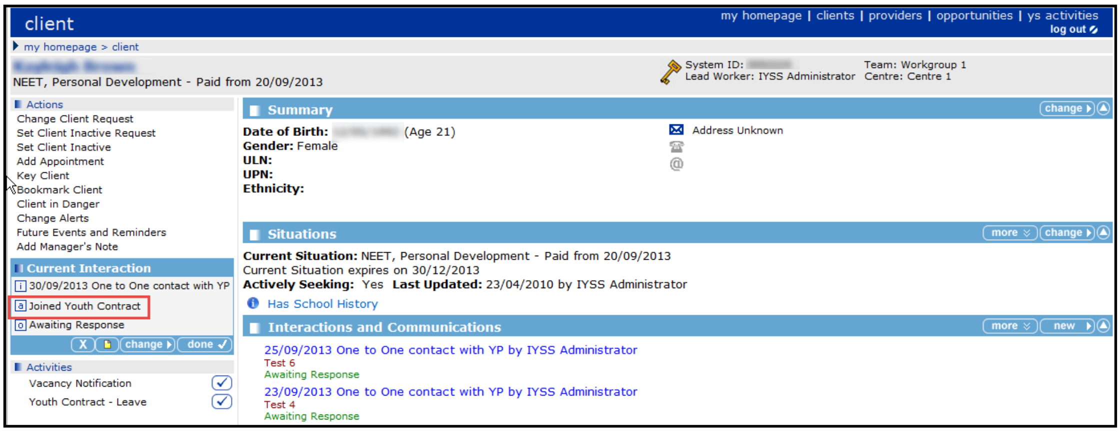


5. Click the **Youth Contract – Join** link in the **Activities** panel to display the **Join Youth Contract** panel.



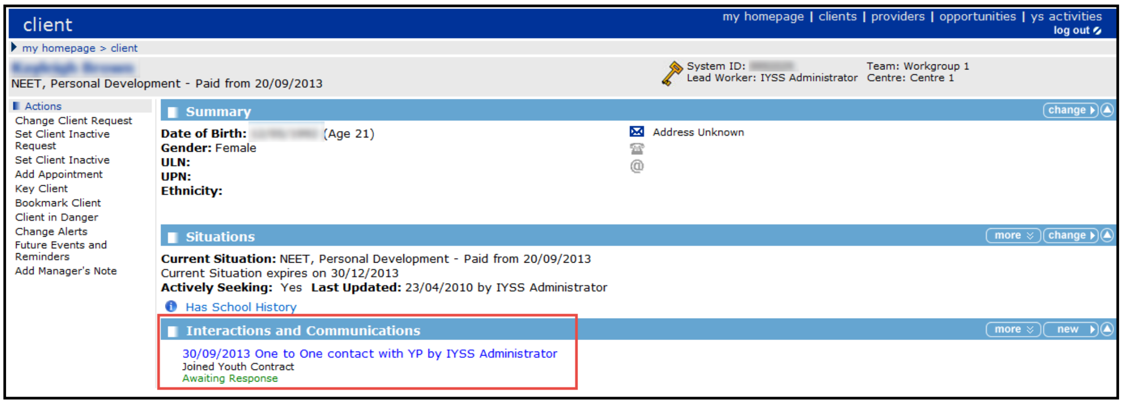
6. Select the appropriate **Category** from the list.
7. Click the **continue** button to display the client record which shows the **Joined Youth Contract** link in the **Current Interaction** panel on left-side.

NOTE: *As required for the NCCIS return, the* ***Youth Contract Indicator*** *and* ***Start Date*** *are created.*

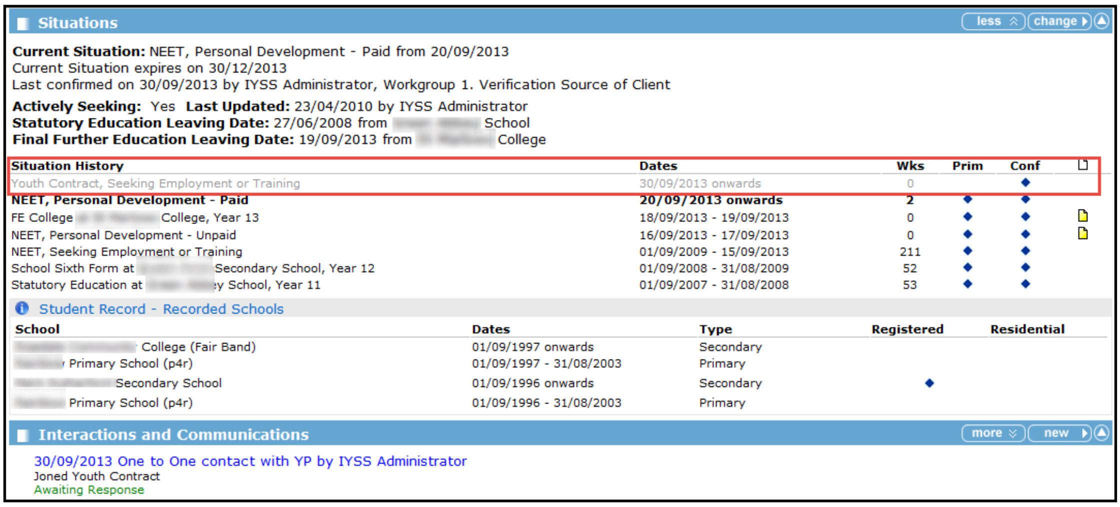


NOTE: *Under* ***Activities****, the* ***Youth Contract – Leave*** *field is used when the young person leaves the Youth Contract.*

8. In the **Current Interaction** panel, click the **done** button to display the **Interactions and Communications** panel showing **Joined Youth Contract** (in grey). This is shown in the example (below) against the interaction of 30/09/2013:



9. In the **Situations** panel, click the **more** button to display the **Situations** dialog. The young person's **Situation History** displays the item, **Youth Contract, Seeking Employment or Training** for 0 weeks, as the young person has only just started.



Uploading Client Lists

You can upload lists of One client IDs into OneIYSS from a .csv file. Once the client IDs are uploaded, you can perform client searches and bulk updates.

The client upload facility assumes the following:

- the first column in the file contains only numeric One Person IDs
- each row contains a unique person ID.

> ***NOTE:*** *To perform this function you need to be granted the security permission:* ***Client Bulk Updates | Upload Client List****.*

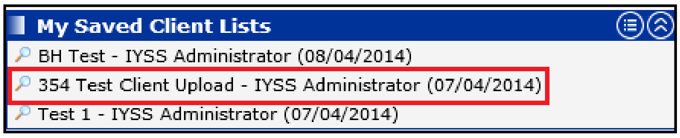
1. Select **My Homepage** | **IYSS Links** | **Upload Client List** to display the **Upload Client List** dialog.

2. Enter the fields as follows:

Field	Description
List Name	Name that is displayed in **My Homepage | My Saved Client Lists**
Description	Hover text that is displayed in **My Homepage | My Saved Client Lists**
Import File	Browse to the .csv or .xls file that contains your client list.

3. Click the **continue** button to begin the upload.

   When the upload is complete, **My Homepage** is displayed. The uploaded client list is saved in the **My Saved Client Lists** panel.



4. To view the results, click the saved client list to display the **client search results** dialog.

> ***NOTE:*** *Clients with errors in their ID data are <u>not</u> listed in the search results. Such errors are simply ignored and not 'exceptioned' out.*

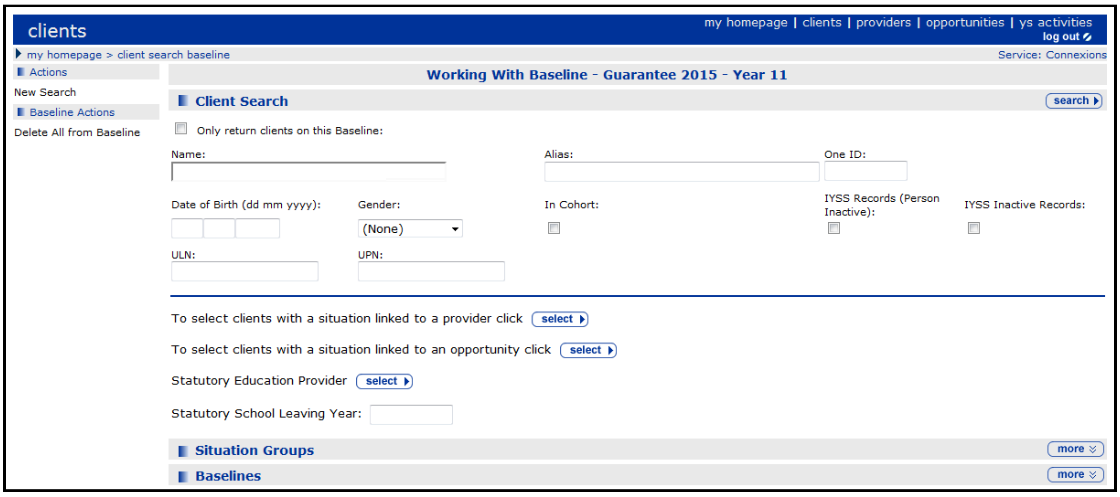
To view **My Saved Client Lists** you need the security permission: **My Aspire Sections | My Saved Client Lists**.

Updating Clients to Baseline

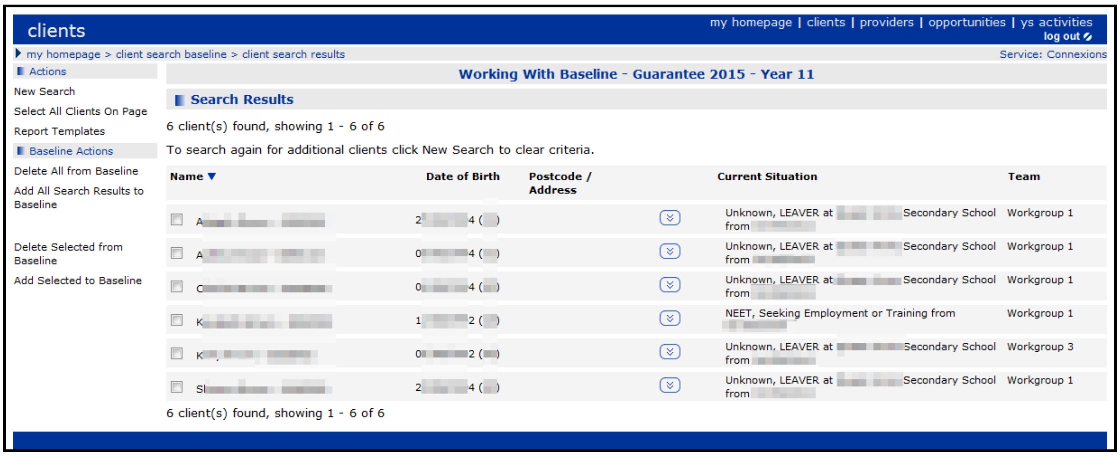
To search for clients and add them to a baseline:

1. Select **My Homepage | Admin/Manager.**

2. In the **Baselines** panel, click the required baseline, for example **Guarantee 2013 – Year 11**, to display the **Working with Baseline – Guarantee 20xx** dialog.



3. Search for the clients you want to baseline by entering search criteria in the **Client Search** section.
4. Click the **search** button to display the **Search Results** dialog. For more information on searching for clients, see Client Searches on page *8*.



5. Select the individual clients to add to the baseline or select all displayed clients by clicking the **Select All Clients on Page** link.
6. To begin the baseline process, select the **Add Selected to Basline** link in the **Baseline Actions** panel. If the process is successful a confirmation message is displayed.
7. To search for additional clients to baseline, click the **New Search** link from the **Actions** panel and repeat the above steps.

> ***NOTE:*** *Following the successful submission of your September NCCIS XML (which contains your September Guarantee baselines), you should go into each Baseline header in the System Admin application and deselect Active. This deactivates the Baseline. Please ensure that this is done by the end of October prior to the submission of October's XML file.*

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