oneeducation

eStart Web User

last updated for the Spring 2020 release (3.71)

Handbook

CAPITA

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eStart Web User Handbook/Spring 2020/26-06-2020

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Contents

01 | Document Change Control

Date	Release	Description
Spring 2020	**3.71**	The **Add-On Modules** chapter has been renamed to **TCP**. The sections listed below has been removed due to no longer being used. Electronic Registration Cost Effectiveness UNA – Universal Needs Assessment See *TCP* page *120*
		The **Delete** functionality has been updated so that Child or Carer records can be deleted without having to remove all the Events that the Child or Carer had previously attended. See *Delete a Carer* on page *54*. See *Delete a Child* on page *62*. This enables the user to comply with data protection rules in a more timely manner if a person wants a record removing from the system.
Spring 2018	**3.65**	The eStart person **Delete** functionality has been updated to be compliant with GDPR regulations. Deleting a person (e.g., parent, carer, child or family) from eStart, now removes all information about them from all the relevant database tables. Deleting a person is irreversible.

02 | eStart Web User Handbook

Overview

eStart is an assessment, reporting and monitoring tool for Children's Centres. eStart is deployed authority-wide using a common database, and so enables Local Authorities to develop a greater understanding of local needs and target resources more appropriately. This handbook is produced to assist with the day-to-day use of eStart.

The eStart Console Manager or Administrator is responsible for the consistent management and maintenance of eStart, setting up user accounts, configuring permissions and monitoring use. The *eStart Web Administrator Handbook* is produced to assist administrators.

Technical Support

The Service Desk is available from 8.30am to 5pm for all support calls and for advice regarding change requests.

You can log a call at https://support.capitasoftware.com/

Logging into eStart

To log in to the eStart demo site, open an internet browser and go to http://www.estartdemo.com.

Your own site's URL for eStart begins with https://. This ensures that it is a secure site so you must use https rather than http to display the web page.

Before you log in, save this page to your favourite sites. Open the **Favourites** menu in your internet browser and click **Add to Favourites**. The next time you want to log in you can then just go to the favourites menu and select **eStart Web** without having to type the whole address in again.

The login screen lists all the settings recorded in your database (these are not shown on figure 1 and figure 2).

There are two versions of the login screen:

1. Standard eStart Web Login Screen

The standard login screen asks for your name and password:

Figure 1 eStart Web Login page (standard)

Enter the user name and password (case sensitive) as provided by your administrator and click the **Login** button to display the **Home** screen. If you enter an incorrect name and/or password, an error message is displayed:

Login Failed!

2. eStart Web Login Screen with Enhanced Security

If your eStart administrator has implemented an extra level of security to eStart to prevent unauthorised access, this login screen is displayed:

Figure 2 eStart Web Login page (with extra security question)

This extended version of the login screen asks for your user name and password as before, but also asks one of a series of questions that you have answered previously and to which only you know the answers. The first time this screen is displayed you must record your answers (which you can change later if necessary), as described below.

- If this screen is displayed but you have not previously entered answers to the security questions, do not type in the answer field. Instead, enter your user name and password and click the **Login** button. A screen is displayed enabling you to enter your answers to the security questions. Once you have entered all the answers you will be logged in. The next time you log in you will be asked one of these questions, selected at random.

> ***NOTE:*** *When you first type in your answers, you must make sure that you give answers you will remember and are spelt correctly. If you give an incorrect or differently spelt answer when you next try to log in, your login will fail.*
> *It is not currently possible to reset your answers if you forget them.*

- If this screen is displayed and you have previously entered your answers to the extra security questions in eStart, type the correct answer into the field and click the **Login** button. If you give an incorrect answer or leave the answer field empty, an error message is displayed:

  Login Failed!

  If your session times out, an error message is displayed:

  Sorry, eStart has ended your session.
  This is due to a period of inactivity.

Click the **Restart** button and re-enter your name and password.

Following a successful login, the **eStart Main Menu** is displayed:

Logging Out

For security reasons, you should always use the **Log Out** button when exiting any of the eSuite applications. Do not use the **Close** button on your internet browser or on the tab in an attempt to log out. This will not always log you out of eStart and may pose a security risk for the data.

Figure 3 eStart Log Out button

Navigation

eStart does not support the use of internet browser **Back** and **Forward** arrows. They should not be used to navigate around eStart under any circumstances.

If these arrows are used you may not receive the expected result and this can result in data issues or inaccuracies.

Changing your Security Answers

If you need to change your answers to the security questions, you can do this after logging in.

The answers are changed via **My Settings/Details | My Details | Change Answers**. If the extra security question functionality is not activated in your version of eStart, this menu option is not available.

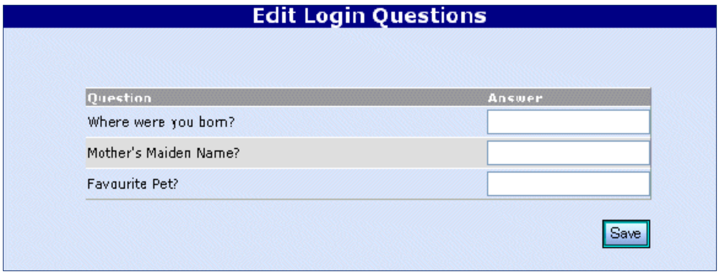


Figure 4 Changing your answers to the security questions

Type your new answers to the questions and click the **Save** button. Make sure your answers are memorable and correctly spelt to ensure that you can log in next time.

Passwords

For eStart accounts to be as secure as possible, passwords must obey the following rules:

- Must be a minimum of eight characters
- Must contain at least one number
- Must contain at least one capital letter (A-Z).

Passwords are changed under the following circumstances:

- Every new user must change their password the first time they log in to eStart.
- Passwords can be changed at any time via **My Settings/Details | My Details | Change Password**.
- The eStart administrator sets a time limit for the life of passwords, so every so often you are automatically asked to choose a new password.

You must enter your current password (the one you have just used to log in) and your new password, and retype your new password to confirm it. These two versions of the new password must be identical. Passwords are case sensitive.

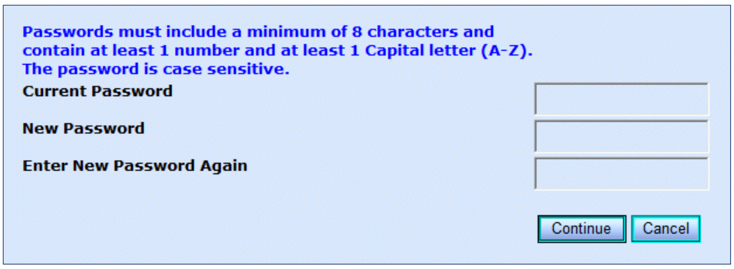


Figure 5 Change Password

Dates

To enter a date, either type the date in the format dd/mm/yyyy in the field, or click the calendar icon to display the calendar, and select the date.

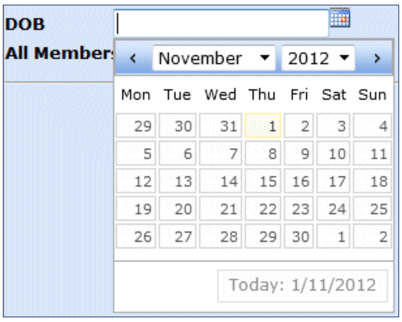


Figure 6 Popup Calendar

Colours and Indicators

In order to highlight important information, different colours are used throughout eStart.

If text is displayed in red, this is a warning and may indicate that more information needs to be added, or that something is incomplete.

Fields highlighted in yellow are either mandatory fields or fields that are not mandatory but are considered important parts of records or are used as search criteria in other areas of the system.

To view more details for an individual, click on the **Go** button .

People Icons

When looking at the results of a search, the individuals are displayed with different icons:


Baby girl


Baby boy


Girl


Boy


Female carer


Male carer


Relationship to child not set


Gender not set

03 | Find People

The People Search Facility

The **Search** option enables you to find any individuals that have been entered into eStart.

> ***Important Note**: In order to avoid duplication of records you must always search for a person or family to check that they don't already have an eStart record before you add them to eStart.*

Click **Search** on the main menu or in the left-hand menu to display the search.

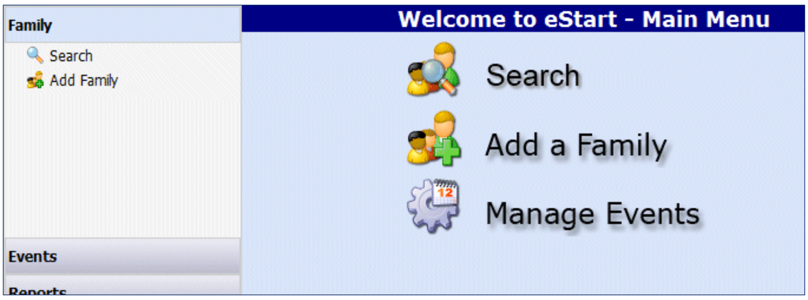


Figure 7 Search for a Person

To use the search facility you have to enter some basic information about the person or family, then select the results that match these criteria.

Many search options are available. You can search on **First Name**, **Surname**, **Address**, **Postcode**, **Family Status**, **Member ID**, **Family ID**, **Member Status**, **Type** (child, carer or both), their registered **Setting** and their **Date of Birth**.

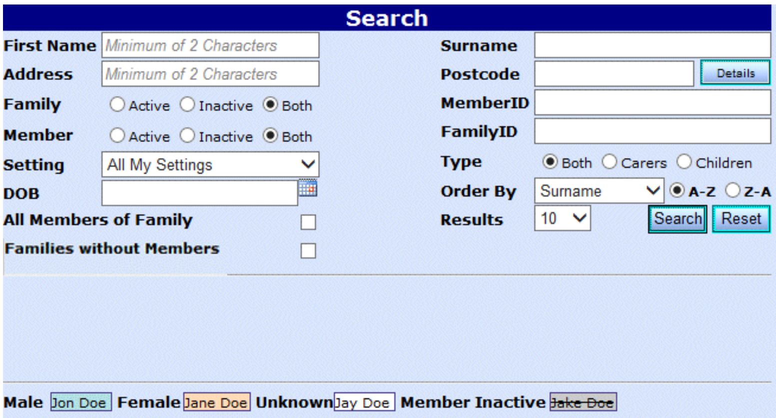


Figure 8 Search for a Person | Search Criteria

You can search using part or all of a **Name**, **Postcode**, **Family ID** etc. It is better not to make your search too specific (for example, enter Jon instead of Jones and the first part of a postcode rather than the whole postcode), but you must enter at least two characters in any field.

The **%** symbol acts as a wildcard in eStart searches, i.e. if you enter % instead of a character the search acts as if the % is any character, including an apostrophe or space. For example, using **D%** in the surname field results in all the surnames starting with D (Davies, D'Angelo etc) being included. The wildcard is particularly useful when searching for a name such as O'Connor that could have been entered as O' Connor, O Connor or Oconnor. By entering O% the search finds all these versions. Entering %% (i.e. the required minimum two characters) displays all results that meet the other search criteria.

If you enter a postcode, clicking the **Details** button displays the full address information for that area, and the nearest children's centre or setting.

If you need to begin the search again, click on the **Reset** button to clear all the fields.

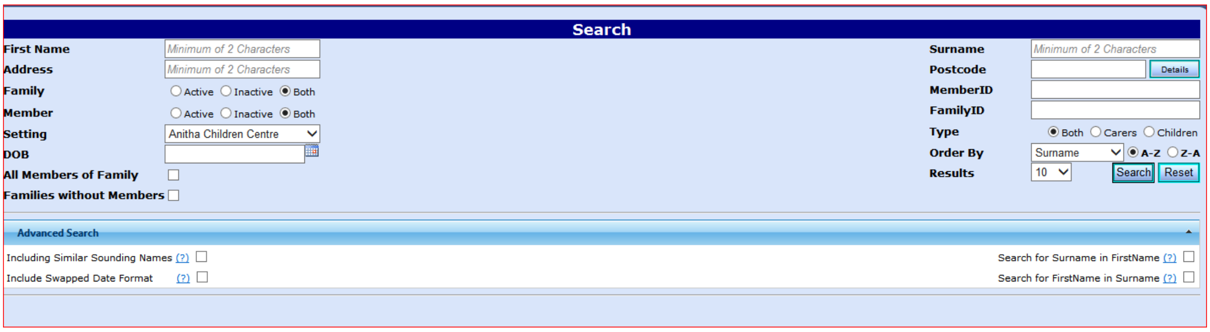
Other Search Options

If you change any of these options, click the **Search** button again to display the new list of results.

- Select the **All Members of Family** check box to include all the members of each family in the list.
- Select the **Families without Member** check box to search for inactive families that do not have any members recorded.
- The default search criteria are set to display both carers and children. Change the **Type** if you wish to display only one of these.
- If you would like the results to be displayed in a particular order, select the **Order by** function. By default the list is in alphabetical order by **Surname**, however this can be changed to order the list by **Name**, **Address**, **Postcode**, **Family ID** or **Age**. The order can be reversed using the **A-Z** and **Z-A** radio buttons.
- Choose how many results to include in the list, from 10, 50, 100 or 500.

Advanced Search Options

Users with permissions to search for members will also see an **Advanced Search** section on the main **Search** page.



Expand the **Advanced Search** bar to display the four options now available to supplement any member or family search:

- **Including Similar Sounding Names**: returns results for similar sounding names i.e. Smith and Smyth
- **Include Swapped Date Format**: searches for swapped dates i.e. a date of birth would consider 8/7/2012 as well as 7/8/2012.
- **Search for Surname in First Name**: searches for surnames that may have been inadvertently recorded in the **First Name** field i.e. Jake Samuel. If selected, the search will also consider and return Samuel Johnson in any results.
- **Search for First Name in Surname**: searches for first names that may have been inadvertently recorded in the **Surname** field, i.e. Summer Roberts may also return John Summer in addition to Summer Robert.

Search Results

A basic search gives a large number of results; in this example, searching on **Surname** only, 25 records have been returned, the first 10 of which are displayed (as per the selection in the **Results** drop-down):

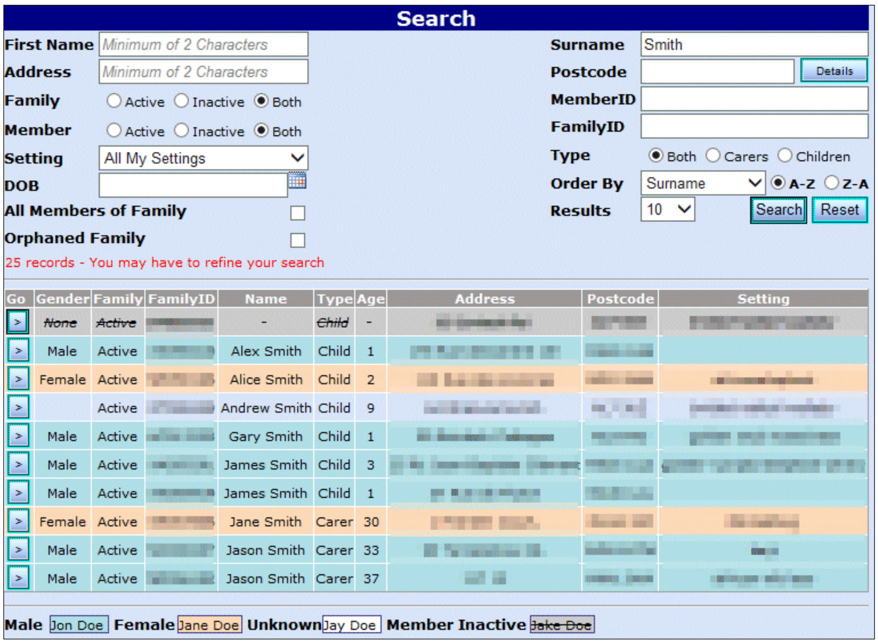


Figure 9 Search results using a single criterion

It is usually better to perform a search with more criteria, to minimise the number of results.

In the example, an entry has now been made in the **First Name** field:

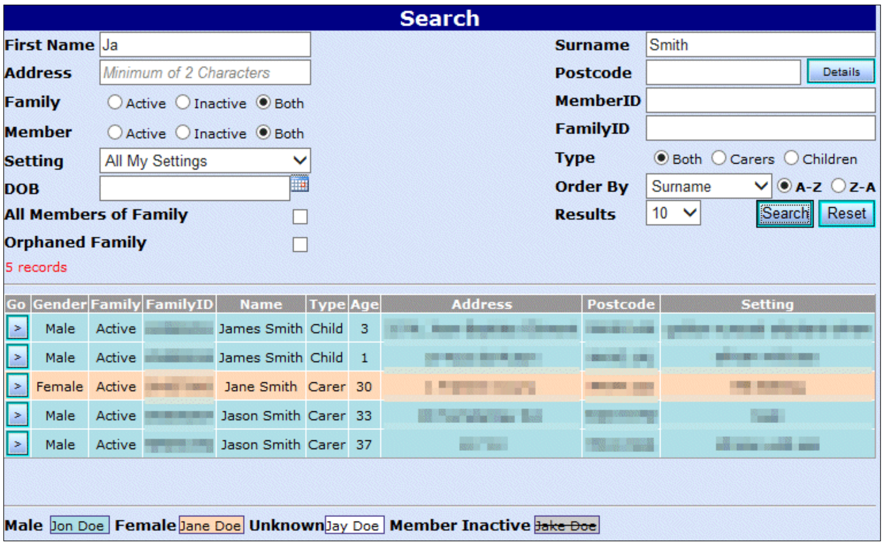


Figure 10 Search results using additional criteria

To see the details for an individual, click the arrow against their name to display their **Family** screen.

If you then access other areas of eStart, you can return to the results of the search by selecting **Search** | **Results** in the left-hand menu. This displays the results of the latest search.

If you only select **Search**, this displays the criteria that were entered, without the results.

You can select members of the **Current Family** and view their details using the left-hand menu.

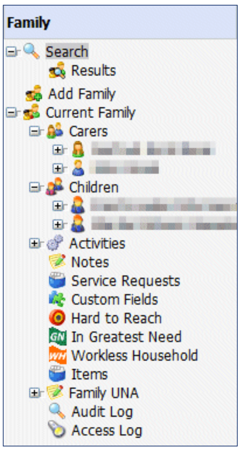


Figure 11 Current Family tree view

Request Affiliations

If you do not have permissions to edit or manage a family, you can request an affiliation.

1. First, search for the family.

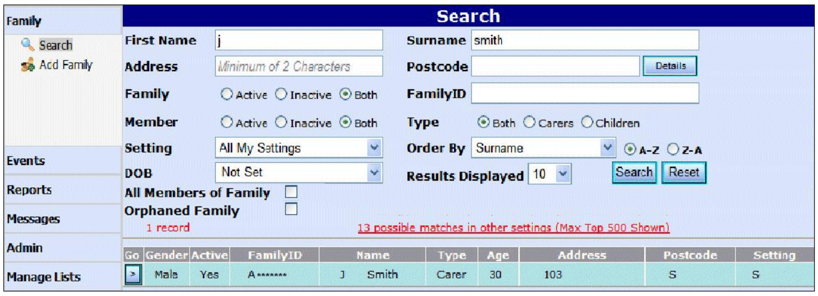
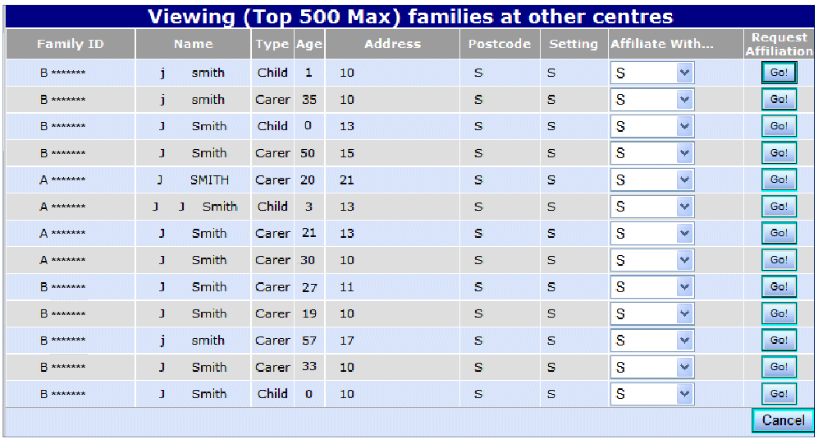


Figure 12 Search results with information message

2. When you retrieve the results, you may see a message similar to that shown in *Figure 12* above:
   2 possible matches in other settings

   Click the message to display all the possible matches.



Viewing (Top 500 Max) families at other centres

Family ID	Name	Type	Age	Address	Postcode	Setting	Affiliate With...	Request Affiliation
B *******	j smith	Child	1	10	S	S	S	Go!
B *******	j smith	Carer	35	10	S	S	S	Go!
B *******	J Smith	Child	0	13	S	S	S	Go!
B *******	J Smith	Carer	50	15	S	S	S	Go!
A *******	J SMITH	Carer	20	21	S	S	S	Go!
A *******	J J Smith	Child	3	13	S	S	S	Go!
A *******	J Smith	Carer	21	13	S	S	S	Go!
A *******	J Smith	Carer	30	10	S	S	S	Go!
B *******	J Smith	Carer	27	11	S	S	S	Go!
B *******	J Smith	Carer	19	10	S	S	S	Go!
B *******	j smith	Carer	57	17	S	S	S	Go!
B *******	J Smith	Carer	33	10	S	S	S	Go!
B *******	J Smith	Child	0	10	S	S	S	Go!

Cancel

Figure 13 Viewing Families at other centres

3. Click the **Go!** button for the family to make the affiliation request and return to the **Family** screen.

   A user with administrator access can confirm the request:

1. Select **Admin** | **Affiliation Requests** from the left-hand menu.

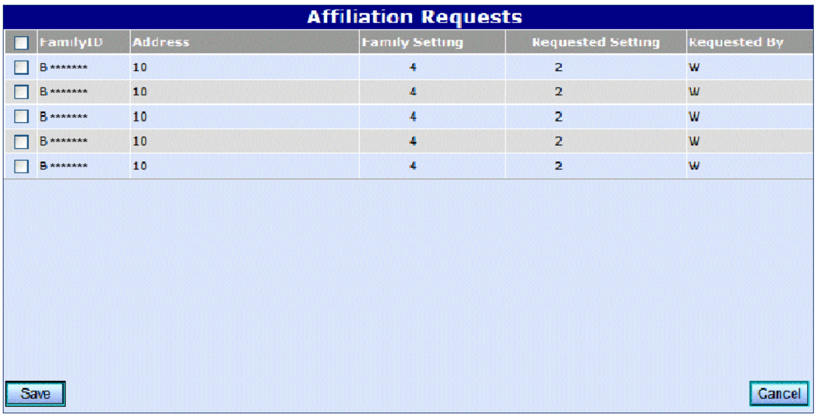


Figure 14 Admin | Affiliation Requests

2. Select the family you wish to affiliate and click the **Save** button.

   The family has now been affiliated to the requested setting. If the requestor runs a search, the family appears in their setting.

04 | Add a Family

Add a New Family

Before you add a new family you must always carry out a search for them to make sure that they aren't already recorded in eStart. Once you have done this, click **Add Family** from the left hand menu, or return to the **Home** page and click **Add a Family**.

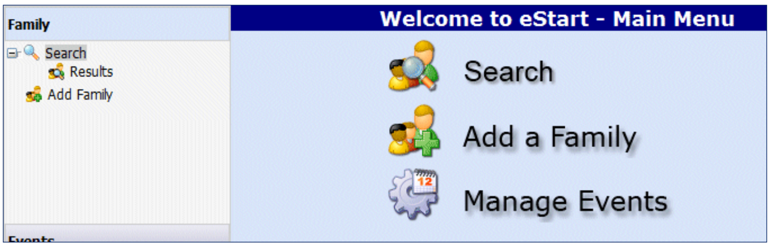


Figure 15 Add a New Family

Complete the following steps to add the new family to eStart.

Step 1: Address Details

The first screen is the **Add Family** screen. The fields highlighted in yellow are mandatory.

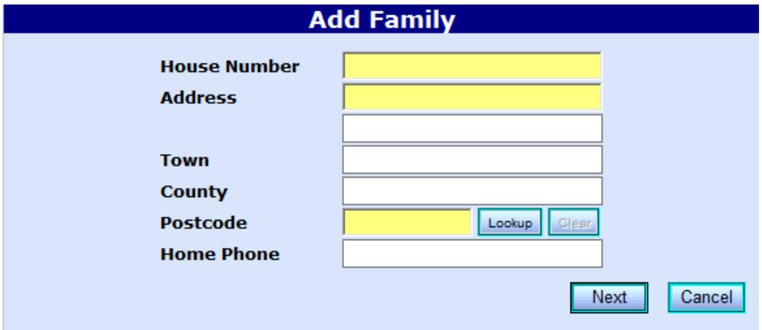


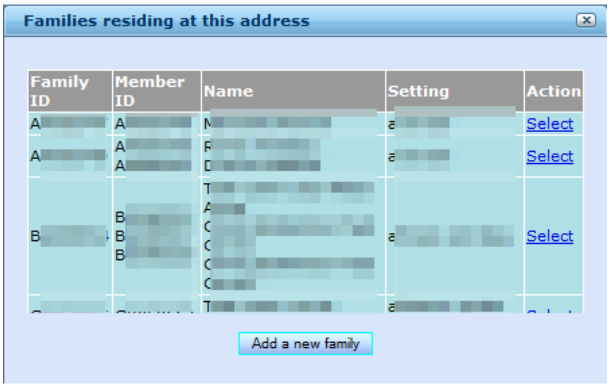
Figure 16 Add a Family screen

If the address is already in eStart you can use the postcode lookup to search for an existing address to complete this section.

- Enter a complete postcode in the **Postcode** field and click the **Lookup** button to display a list of known addresses for that postcode.
- Alternatively, if you are unsure of the postcode or don't have the whole postcode, enter a house number and part of the address and click the **Lookup** button to display a list of all addresses that include this house number and address.

Select the correct address from the list and click **Next.**

The following dialog may be displayed:



This indicates that the family might already be in the system. Review the list of families. If you find the family you are trying to add in the list, click the **Select** hyperlink to display the full details for the family. If the family you are trying to add is not listed, click the **Add a new Family** button to add them.

Figure 17 Families residing at this address

Step 2: Registration, Setting and Additional Affiliation Details

1. Enter the family's **Date Joined**. This defaults to today's date but you can use the dropdown calendar to change it, or click in the field and delete.
2. Select the **Registration** description that is most appropriate for this family.
3. **Setting** (mandatory) defaults to setting that is assigned to the family's home postcode. This can be changed to another setting by selecting from the dropdown list.
4. Click the **Update Affiliations** button to affiliate the family to more settings if you know that they are already linked to them.

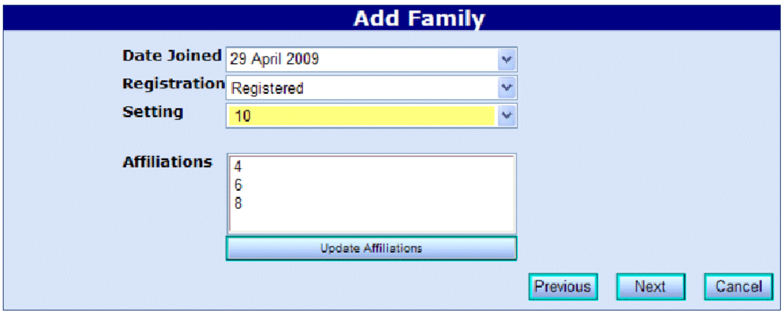


Figure 18 Add a Family | Date Joined, Registration, Setting & Affiliations

> ***Note**: Administrators can add postcodes and their assigned settings via **Admin | Manage DropDowns | Postcodes/Settings | Postcodes**.*

Step 3: GP and Health Visitors

Select the family's **GP Practice**, **Centre Health Visitor** and **Family Health Visitor** from the dropdown lists, then click **Next.** These are all optional.

Figure 19 Add a Family | GP & Health Visitors

Step 4: Add Children and Carers, or Finish

Next, you can either add a carer or child to the new family. Alternatively, click on **Finish** to create the record and enter child and carer details at a later time.

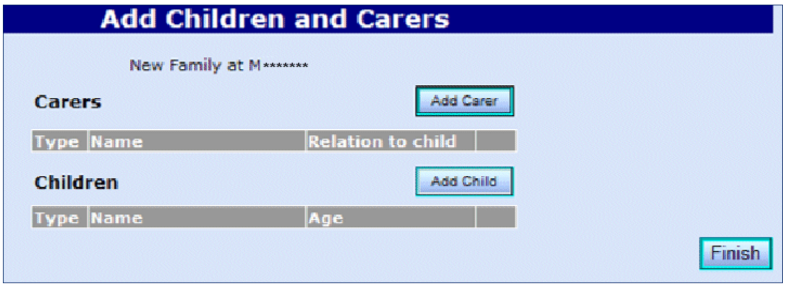


Figure 20 Add a Family | Add Children & Carers

> ***Note**: If you have the **One/eStart Link** module, an **Add Carer | Search One** screen is displayed at this point to enable you to add a carer to eStart whose details are already recorded in One. Click **Next** when you have finished.*

Step 5: Add Carer – Basic Details

If you select **Add Carer** the following screen is displayed:

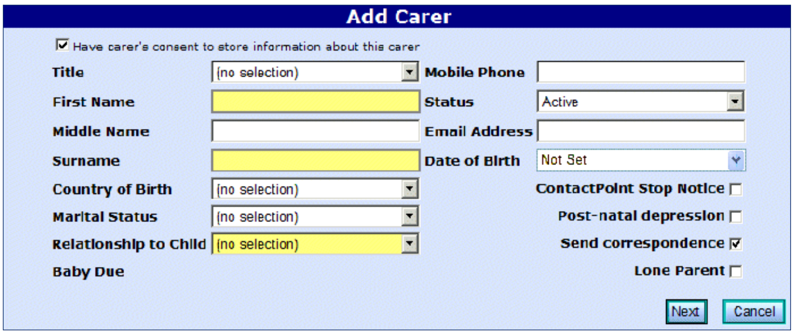


Figure 21 Add a Family | Basic Carer Information (1)

Complete all the relevant fields.

By default the new carer's record is active and the **Send Correspondence** check box is selected. You can change these if they are not the settings you need.

First Name, **Surname** and **Relationship to Child** are mandatory. All other fields are optional. If you enter the same name as another member of this family (or the same name and date of birth), you are warned when you move to the next page. You can continue but should first check that the duplicate is correct.

The entries in the **Relationship to Child** dropdown are added and maintained by administrators via **Admin | Manage Dropdowns | Carer | Carer Descriptions**. The choice from this dropdown indicates the gender of the carer, determines which icon is displayed on their details and makes other options available, for example, the **Carer | Health | Pregnancy** page is only available for carers with a female carer description.

> ***Note**: The **Lone Parent** check box is optional but is used by some reports, for example the **Workless Household** custom queries (see page* 143*) that support Payment by Results (PbR), so it is important to select this check box when appropriate.*

Click the **Next** button to continue or the **Cancel** button to return to the **Add Children and Carers** screen.

Step 6: Add Carer – Additional Information

Now you need to complete the following details.

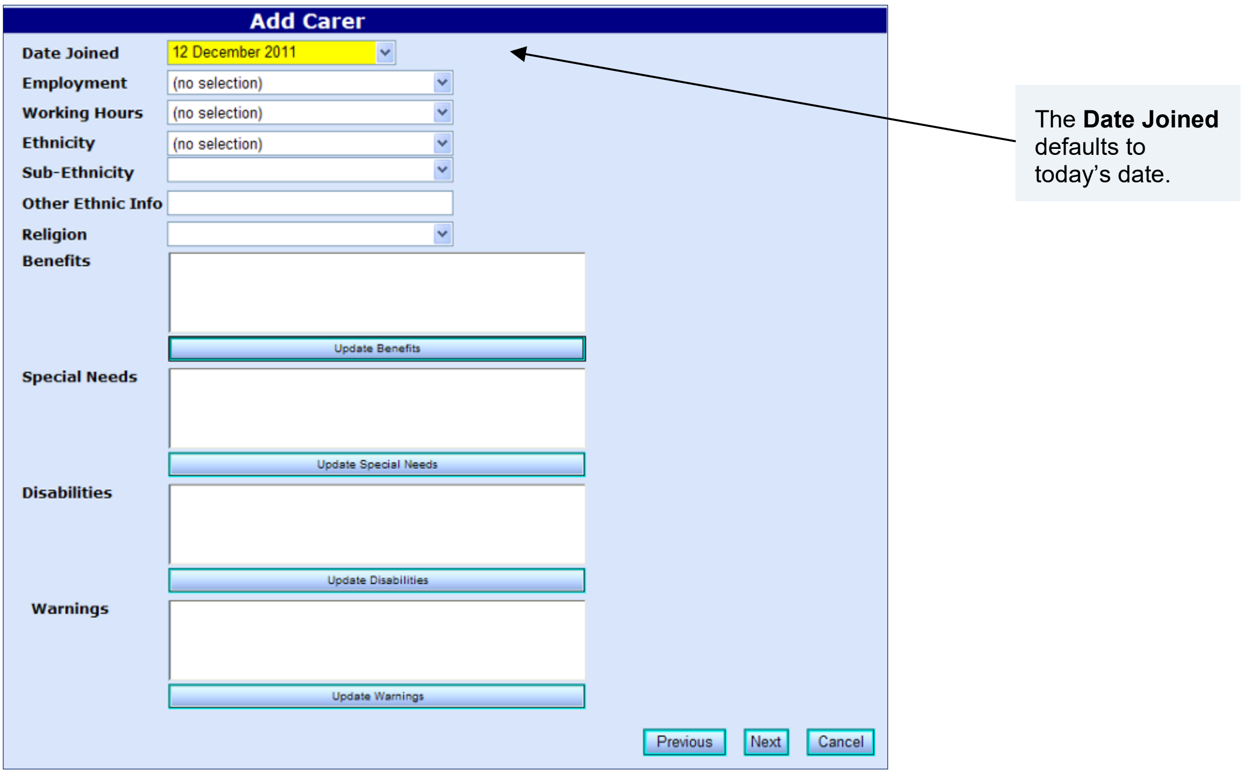


Figure 22 Add a Family | Additional Carer Information (2)

Select **Employment**, **Working Hours**, **Ethnicity**, **Sub-Ethnicity** and **Religion** from the dropdowns.

Use the **Update** buttons to update **Benefits**, **Special Needs**, **Disabilities** and **Warnings**. Click on items in the list to add them; if you add one by mistake, click on it again to remove it.

Click the **Next** button to continue.

> ***Note***: *The **Employment** and **Working Hours** fields are not linked to the **Workless Household** records, which must be maintained separately via the **Workless Household Details** button on the **Family** screen, or the **Workless Household** option in the left-hand menu.*

Step 7: Add Carer – Address and Languages

Sometimes a carer's address may be different to that already recorded for the family. If this is the case, their address can be added here. You do not need to enter an address here if it is the same as the family address you have already entered.

Select **Language** details from the dropdown lists (optional).

Figure 23 Add a Family | Carer Address & Language Details

Click the **Next** button to continue.

Step 8: Add Carer – Smoking History

You can now enter any smoking history for the carer. This is optional.

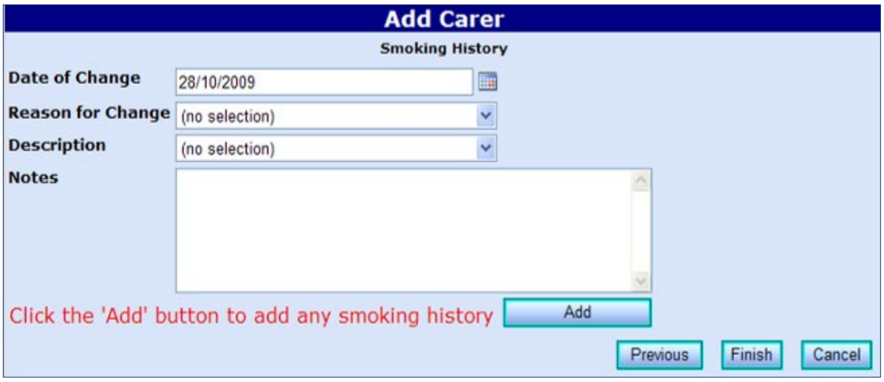


Figure 24 Add a Family | Carer Smoking History

***Note**: Administrators can add more reasons and descriptions via **Admin | Manage DropDowns | Health**.*

When entering smoking details you need to enter both a **Reason for Change** and a **Description** in order to save the information. Click the **Add** button to save the details, which are then added to the smoking history, below.

To add subsequent smoking history records, select the carer from the **Family Details** screen or from the left-hand menu.

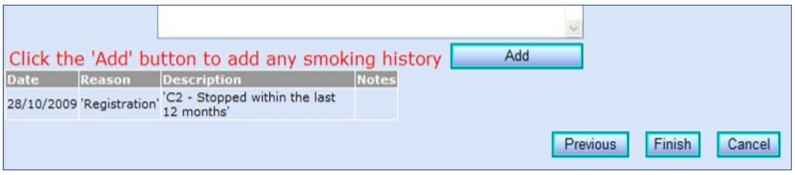


Figure 25 Add a Family | Carer Smoking History added

Click the **Finish** button to complete the new carer record. The new carer's details are displayed.

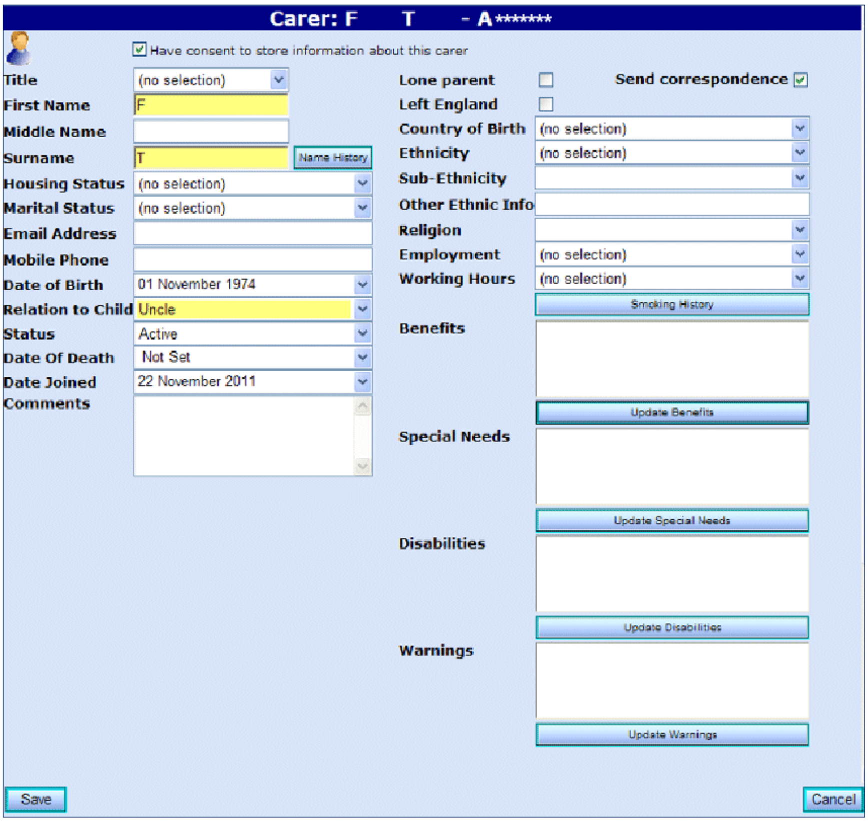


Figure 26 Add a Carer - Carer Details

You can add to any of these details, or update them before clicking the **Save** button.

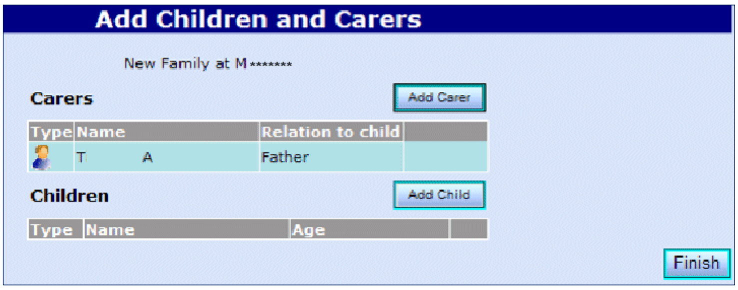


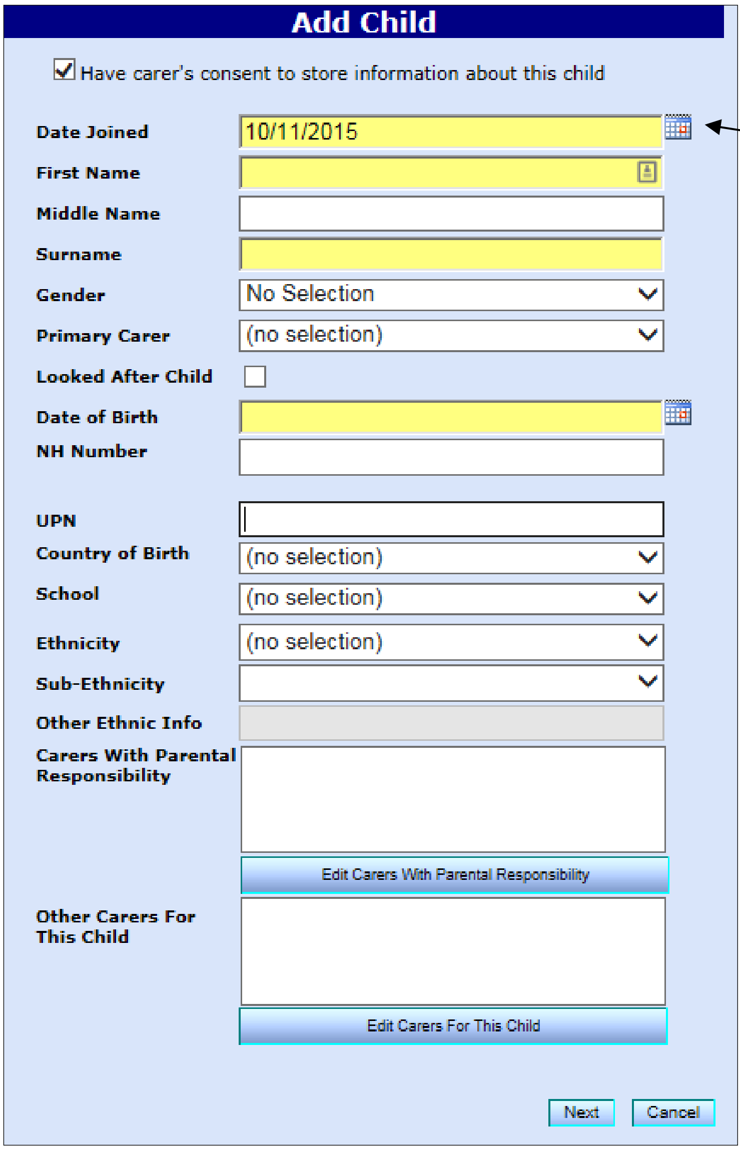
Figure 27 Add a Family - new Family with Carer details added

Click **Add Carer** to add more carers, or click **Add Child**. Alternatively, click on **Finish** to create the family record and add child details later (by clicking **Add Child** on the **Family Details** screen).

Step 9: Add Child – Basic Details

> ***Note**: If you have the One/eStart Link, the **Add Child | Search One** screen is now displayed, to enable you to add a child whose details are already recorded in One. Click **Next** when you have finished.*

When you select **Add Child**, the following screen is displayed:



The **Date Joined** defaults to today's date.

Figure 28 Add a Family | Child Information (1)

First Name, **Surname** and **Date of Birth** are mandatory, all other fields are optional. If you enter the same name as another member of this family (or the same name and date of birth) you are warned when you move to the next page. You can continue, but should first check that the duplicate entry is correct.

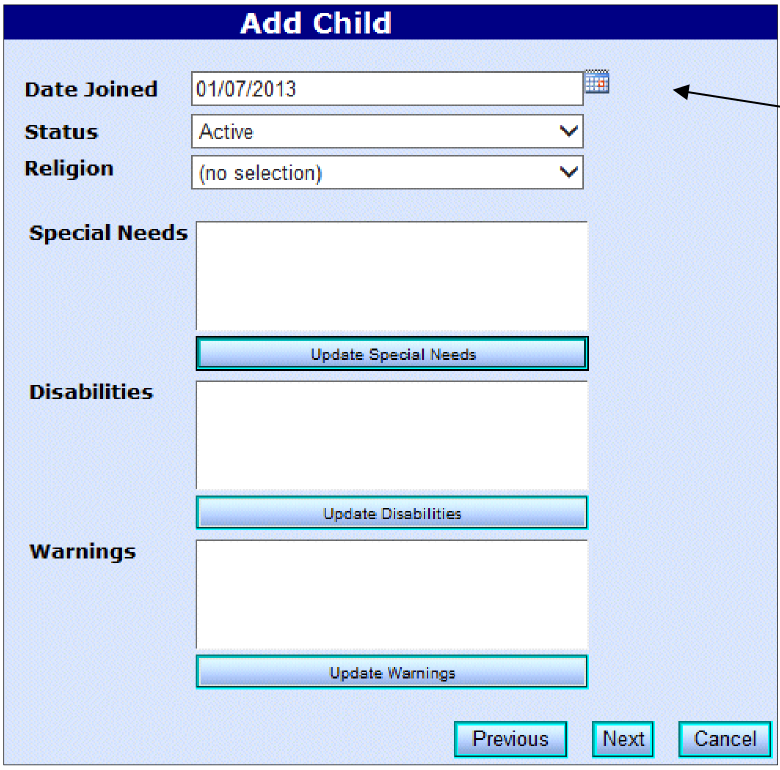
There are two lists of carers for a child; those with **Parental Responsibility** and **Other Carers for This Child**. Anyone who has been added as a carer for the family will be included in both lists, however when you click on a name in one of the lists to select them, that name is removed from the other list because the two lists are mutually exclusive.

- **Carers with Parental Responsibility** are those carers who have legal rights and obligations in making decisions which affect the child's life.

- **Other Carers for this Child** might include, for example, an adult within the household who is the parent of other children within the same family but not of this child. This person might be a carer for the child but would not necessarily have parental responsibility.

Step 10: Add Child – Additional Information

You can now enter further details about the child including **Date Joined**, **Status**, **Gender** and **Religion**. Use the **Update** buttons to add details about **Special Needs**, **Disabilities** and **Warnings**.



The **Date Joined** defaults to today's date.

Figure 29 Add a Family | Child Information (2)

Click the **Next** button when all the details have been entered.

Step 11: Add Child - Address and Languages

Sometimes a child's address may be different to that of their family. If this is the case, it can be added here. You do not need to enter an address here if the child's address is the same as the family address you have already entered.

Select the child's language details from the dropdown lists.

These fields are optional.

Figure 30 Add a Family | Address and Languages

Step 12: Add Child - Health Details

Next, you can enter **Health Details** for the child. These are all optional, but this information should be obtained where possible because some of it is used for the **Payment by Results** scheme. Low birth weight and the length of time spent breast feeding are some of the risk factors that can be used when assessing whether or not families are **In Greatest Need**.

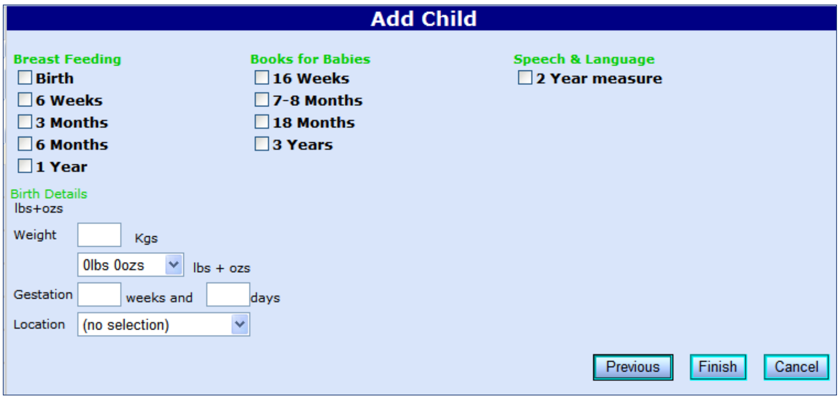


Figure 31 Add a Family | Child Health Details

The low birth weight indicator on the family screen is triggered by entering a birth weight of 2.466kg (5lb 7oz) or less. This information can be changed or added to later, by selecting the child's **Birth and Development** option from the left-hand menu.

Click the **Finish** button to display the child's details (as on Figure 32).

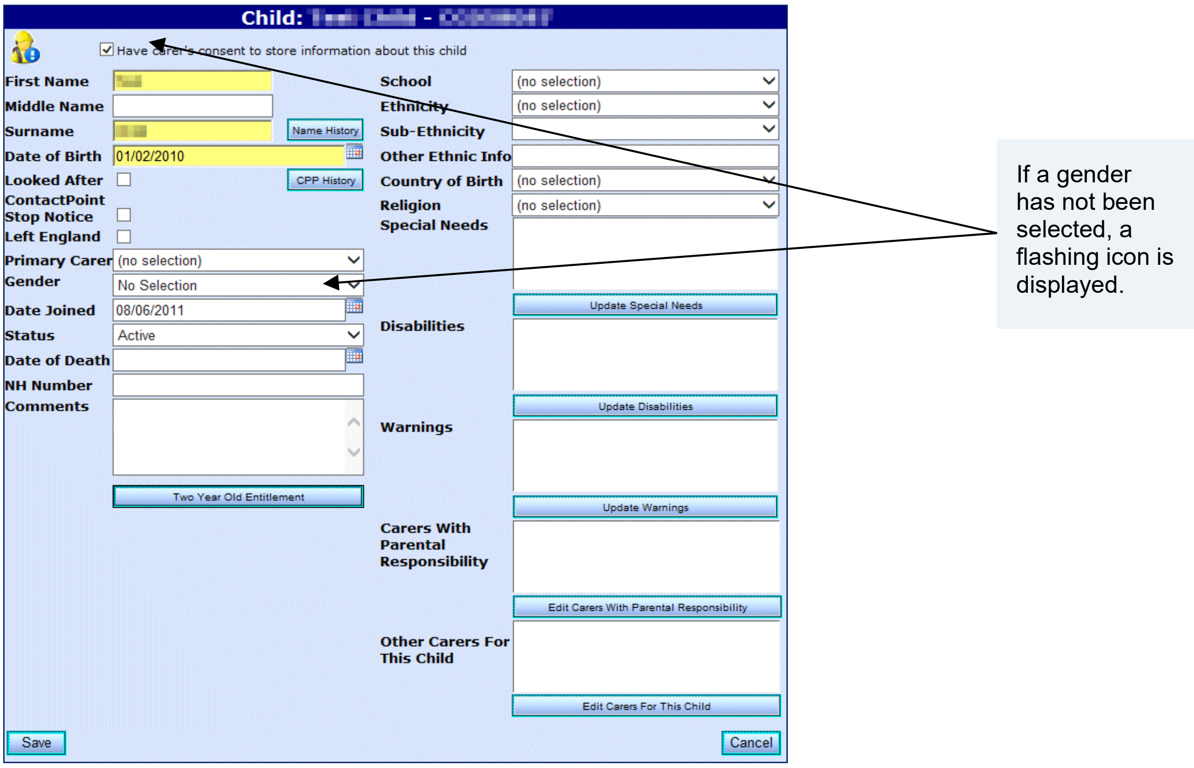


Figure 32 Add a Family | Child Details

You can add to, or update any of these details.

If the child is on a child protection register or is the subject of a child protection plan, you can record this information by clicking the **CPP History** button.

If you wish to add another carer or child then you can do so by either selecting **Add Carer** or **Add Child** from the **Current Family** screen. This can also be carried out at a later stage.

You can add numbers that external systems might use to reference the child by clicking the **External System Identifiers** button. This can be used to record any type of reference number, such as an ID number issued by the council or by the Capita One MIS.

Click the **Save** button.

05 | Family

Family Screen

The **Family** screen is displayed when you select a member from the search screen or click on **Current Family** in the left-hand menu.

This screen shows the most important information about a family. It includes the basic details such as **Address**, **Telephone Number**, **Date Joined**, **Registration** status, **GP**, **Health Visitor** information, the **Setting** to which they belong and whether they have any **Affiliations** to other settings. You can also see the **Status** of the family and all carers and children that are part of this family.

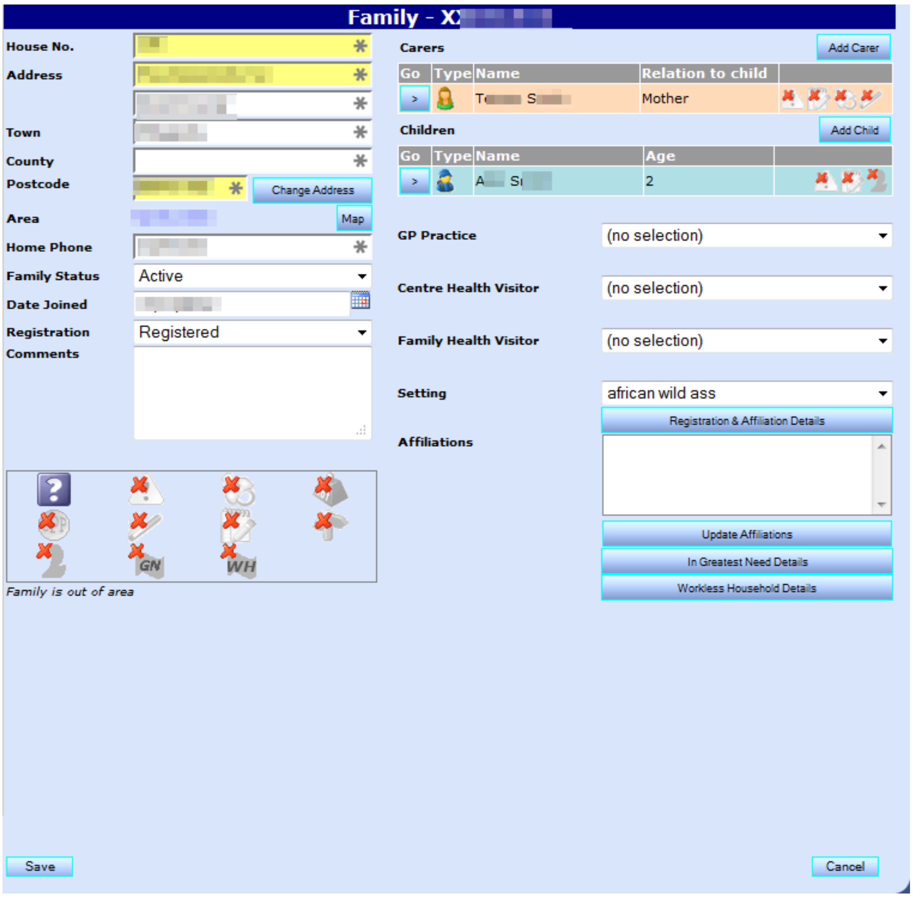


Figure 33 Family screen

To add a carer or child to the current family, use the buttons at the top right-hand side. To view the current carer or child record, click the blue arrow button next to their name. You can make changes to a family record by selecting from the relevant dropdown list, then clicking on **Save**.

> ***Note**: In order to make a family completely inactive you need to make **all** the members of the family inactive as well, on their individual record. Simply changing the family status to inactive will not make all the members of that family inactive.*

To view the **Area** where the family's address is located, click the **Map** button; this opens a new browser window for a website showing a map of the area.

Family Icons

Warning icons are displayed on the **Family, Carer** and **Child** screens. Applicable icons are displayed in colour. If an icon is grey with a red cross, then it does not apply to this family.

Figure 34 Icons not applicable for a Family

Icons Applicable for a Family

Active Icon	Description
	The family are out of area, have no children within the age range for attending a children's centre, and have no pregnant carer.
	The family has a carer who has a warning against them.
	The family has a pregnant carer.
	The family have a child with a low birth weight.
	The family have a child who is the subject of a child protection plan.
	The family has a carer who smokes.
	The family has a notes history. It will be highlighted if there are any notes stored against the family.
	The family has an open referral.
	The family are currently in greatest need of early intervention.
	The family has a child that has taken up the Two Year Entitlement.
	This is currently a workless household.

Move your mouse pointer over an active icon to display further details about that icon.

Figure 35 Hovering over a family icon

Registration and Affiliation Details

To view the details of all the settings with which this family are involved, click the **Registration and Affiliation Details** button on the **Family Details** screen.

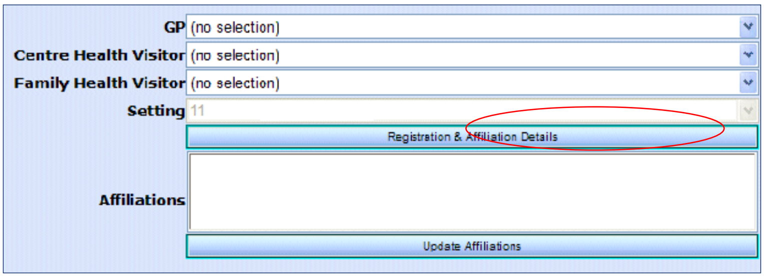


Figure 36 Opening Registration and Affiliation Details

The **Setting Involvement Details** screen is now displayed (registrations and affiliations are collectively referred to as **Involvements** for the purposes of this screen).

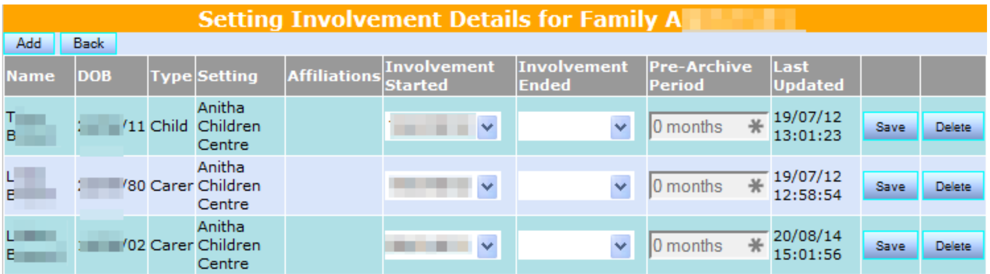


Figure 37 Setting Involvement (Registration and Affiliation) Details

There is a line for each family member, for each of their affiliated children's centres. Some of this information can be changed. If you make any changes, click the **Save** button for that line.

- There may be two lines for a single child or carer at one children's centre if they leave the centre and then come back at a later date.

Involvement Start and End Dates

Initially the involvement dates default to the same dates for the whole family, but you can change them if necessary.

- The **Involvement Started** date cannot be empty. This is the date on which the family members were registered or affiliated to the setting.
- The **Involvement Ended** date can be entered here or can be added when a member is made inactive through the **Status** setting on the **Child** or **Carer Details** screen. When a member is made inactive, all open affiliations and registrations for them are ended and given today's date as the **Involvement Ended** date.

Pre-Archive Period

The **Pre-Archive Period** is was used by ContactPoint and is now deprecated.

Ending and Deleting Involvements

There are important differences between ending an involvement and deleting an involvement:

- If you end an involvement (by entering an **Involvement Ended** date or by a member being made inactive), then that information is sent to ContactPoint and all the details relating to the involvement are kept for the selected pre-archive period.

- If you **delete** an involvement, maybe because it was entered in error (by clicking on the **Delete** button for a line of information on this screen), then an archive fragment[1] will be sent to ContactPoint indicating that the information about the involvement should be removed. When a successful response has been received back from ContactPoint (i.e. the archive process has succeeded), the fragment will automatically be sent again, with all the relevant information about the child, but without the deleted involvement (this is because ContactPoint still needs to know about the child, just not about this deleted involvement).[2]

Add Setting Involvement for a Member

If a family member does not have an involvement for one or more of the settings to which the other family members are registered or affiliated, you can add an involvement. Click the **Add** button at the top of the screen to open the **Add Setting Involvement** screen.

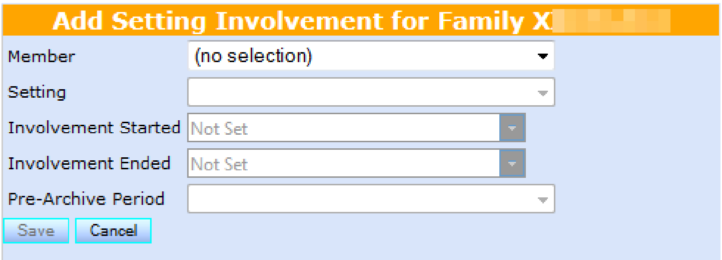


Figure 38 Add Setting Involvement screen 1

Select the member to whom you are adding the involvement from the dropdown. Once you have chosen a name eStart checks to see which of the family's settings have no involvement for this person. You cannot now select a different member without cancelling and starting again.

Figure 39 Add Setting Involvement screen 2

Choose the name of the setting from the dropdown list and enter the **Involvement Start Date**. If the **Involvement End Date** is known then you can also enter it here. You cannot enter dates that overlap with another involvement for the same member at the same setting. However, one involvement can end and another start on the same day for the same member and setting.

The **Pre-Archive Period** is described under **Registration and Affiliation Details**.

When you click the **Save** button you are returned to the previous screen and a new line is added for the member and Involvement you have just added.

---

[1] *A fragment is made up of the child record and all contact details deemed worth sending. See ContactPoint and eStart on page 67 for an explanation of fragments and what they contain.*

[2] *If the archive process fails, then an administrator will need to send the fragment manually as the automatic send will not happen.*

Change an Address

If you have been notified by a family that their address has changed, click the **Change Address** button on the **Family** screen.

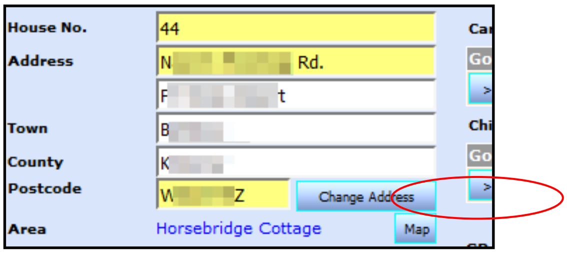


Figure 40 Change Address button

The following screen is now displayed:

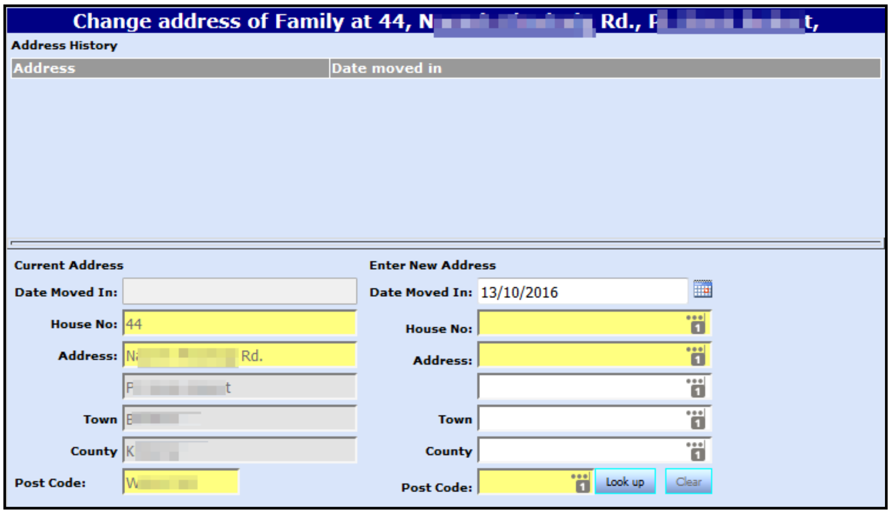


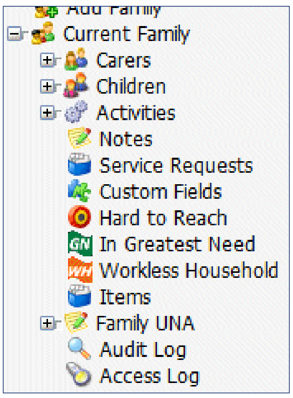
Figure 41 Changing a Family address

You can enter the new address here using the postcode lookup tool. Select their moving date and click **Save**. The family address is now updated.

The **Outside England** check box should be selected if the new address is not in England (for example it is a Welsh, Scottish or Northern Irish address).

Additional Details for a Family

The left-hand menu has further menu options enabling you to record additional information about a whole family. These options appear below the **Carers** and **Children** menu nodes.



The options are: **Activities**, **Notes**, **Service Requests**, **Custom Fields**, **Hard to Reach**, **In Greatest Need**, **Workless Household**, **Items** followed by the **Audit** and **Access Logs**.

Figure 42 Additional Family Menu Options

Activities

Select **Activities** from the left-hand menu for a specific member (child or carer) to display a list of all events attended by this member. To see a complete list of all events attended by all the members of the family, select C**urrent Family | Activities | Existing Contact**.

The list shows the **Activity Name**, the **Date** of the activity and the member's **Attendee Status** for that event. When all the results for a family are displayed, each member's name, type and age are also included.

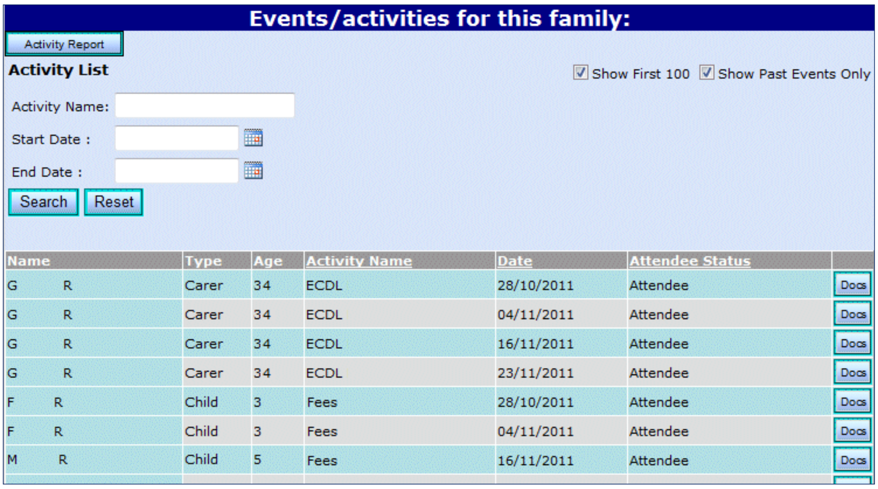


Figure 43 Activities for a Family

Filter the list by entering part or all of an **Activity Name**, and a date range. Select the check boxes in the upper right-hand corner to limit the number of activities listed to the first 100 results or to show only past events.

All a family's events and activities are referred to as **Contacts**. Select C**urrent Family | Activities | New Contact** to add a new activity for a child or carer. When adding the new activity, you can choose which family members it applies to. You cannot add a new activity via **Child | Activities** or **Carer | Activities**.

Add a New Contact

Select C**urrent Family | Activities | New Contact** to display the **Add Family Contact** screen.

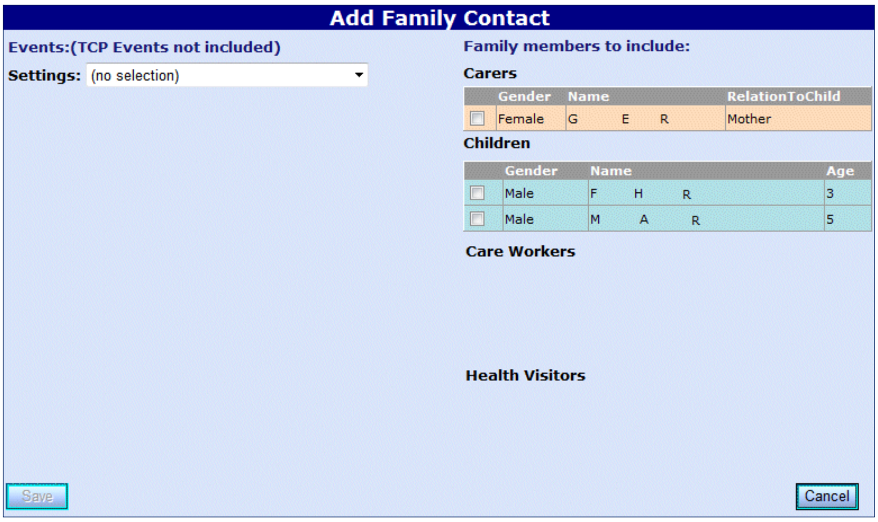


Figure 44 Activities (New Contact) screen

To add a new contact, you first need to search for the events that make up the contact, then select the family members who are taking part and any care workers or health visitors who are involved.

1. Select the setting at which the activity is held from the **Settings** dropdown.

   The **Home Visit** check box and **Event Type** dropdown list are now available:

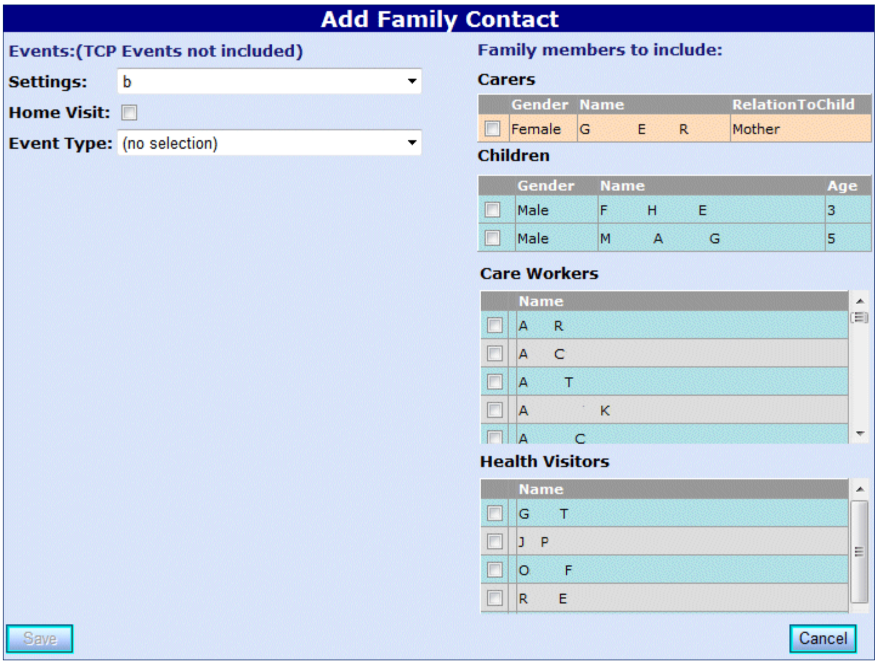


Figure 45 Activities (New Contact) screen with Setting selected

2. Select the **Home Visit** check box if appropriate, and select the **Event Type** from the dropdown list.

   The **Date Range** fields are now available.

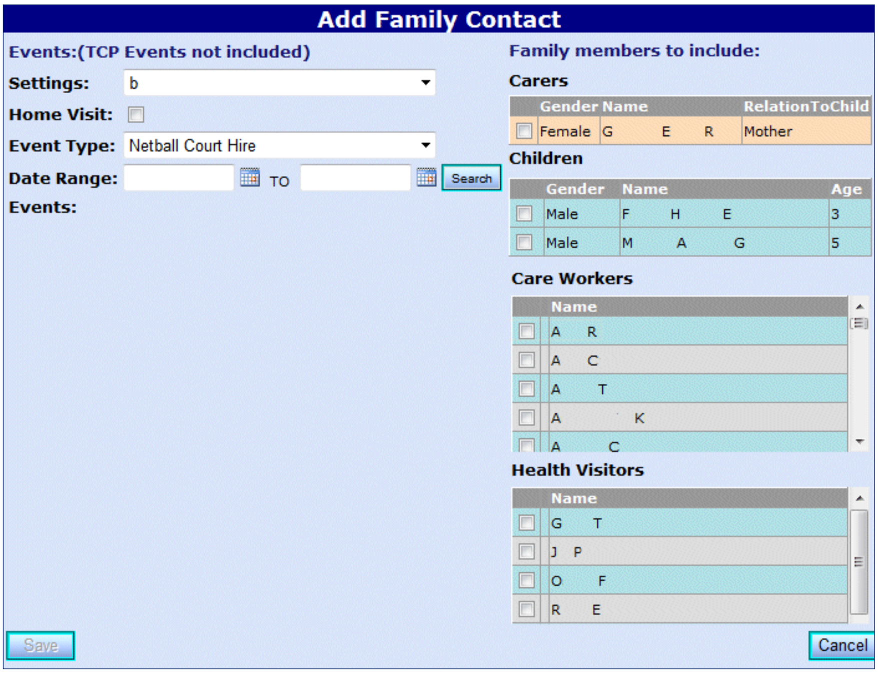


Figure 46 Activities screen with Setting and Event Type selected

3. Enter the **Date Range** of the contact and click **Search** to display a list of events at this setting that fall within the date range. An information message is displayed if there are no events for the selected date range.

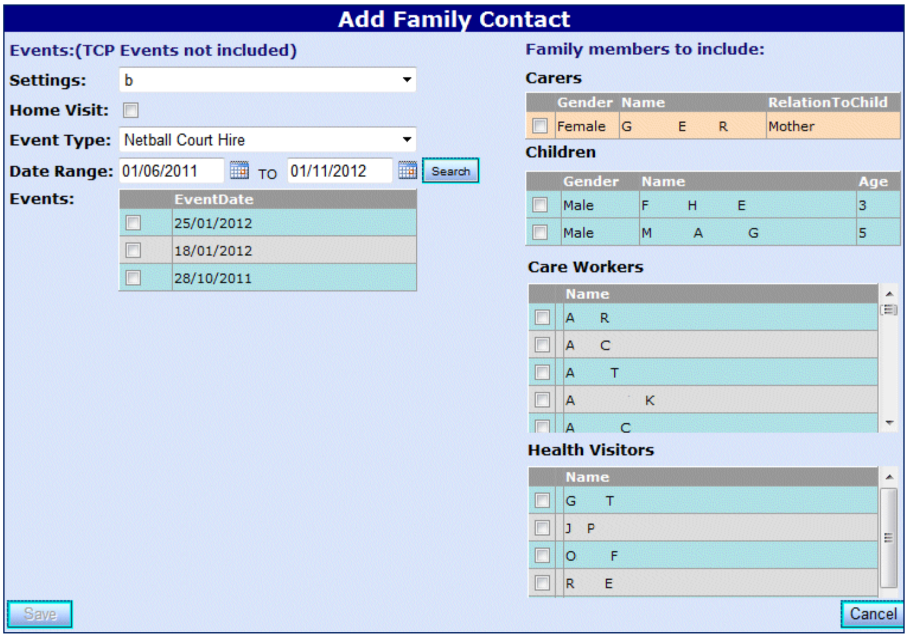


Figure 47 Activities screen with date range selected

4. To add one or more family members, care workers or health visitors to an event (or multiple events), select their names and the event dates to which you wish to add them, and click **Save**.

Linked Documents

A document can be linked to an activity by clicking the **Docs** button for the activity (see *Figure 43 Activities for a Family*), to display the **Documents** panel, then uploading it to eStart. Only files that meet the following requirements can be uploaded:

- Files must be smaller than 2MB.
- Supported file types are: .doc, .docx, .xls, .xlsx, .txt, .ppt, .pptx, .pdf, .pic, .jpg, .jpeg, .bmp, .jpe, .jfif, .dib, .gif, .tif, .tiff, .png.

To upload and link a document, click the **Browse** button to locate the document then click the **Upload** button.

Each linked document is listed, showing the name and document type. Click a linked document name to open it.

An uploaded document can be removed from the activity record by clicking the **Delete** button.

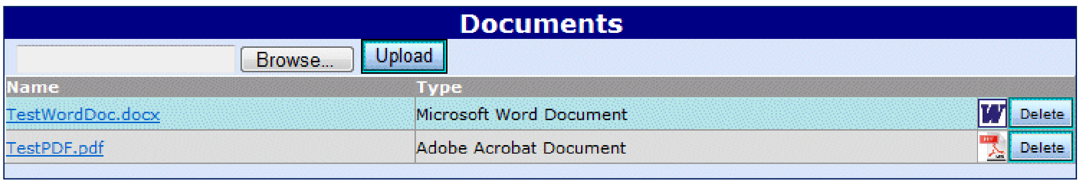


Figure 48 Linked Documents

Activity Report

The **Activity Report** contains details of all activities attended by a family, carer or child, or at which they are registered.

1. Click the **Activity Report** button (see Figure 43 Activities for a Family) to display the date range.
2. Select a different **From** and **To** date if required.

   The report contains all activities between these dates.

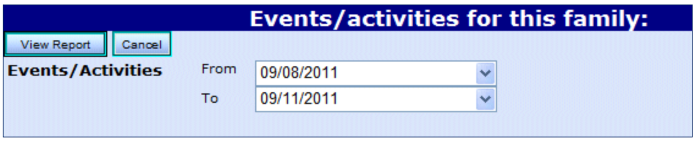


Figure 49 Choose Dates for Activity Report

3. Click the **View Report** button to generate the report.

   The report displays identifying information for the selected family, carer or child and details of their activities within the chosen date range.

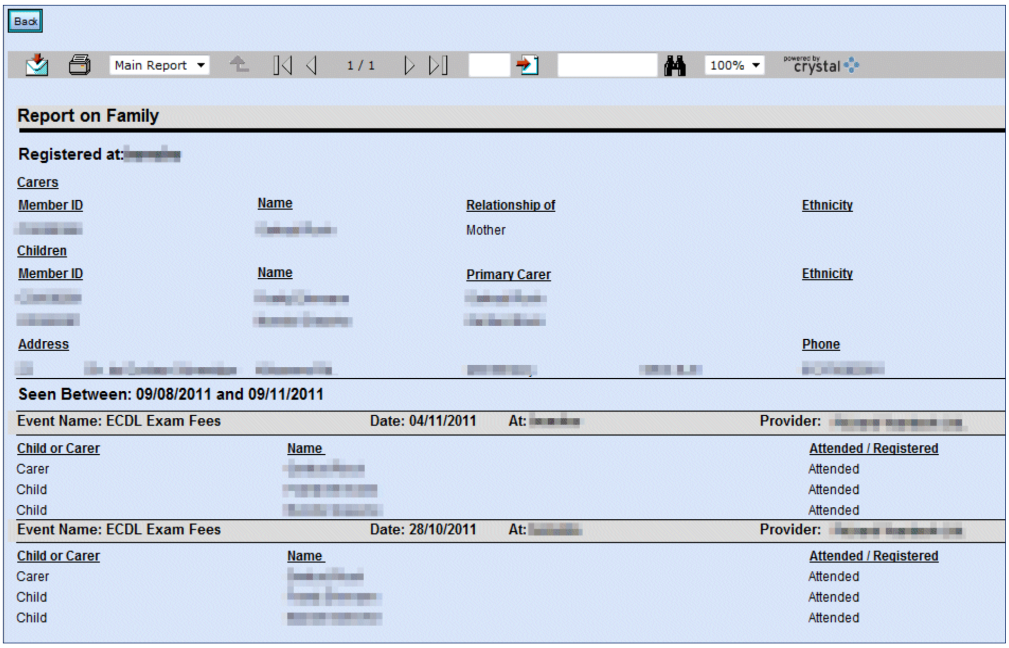


Figure 50 Activity Report

Notes

Notes can be recorded for carers, children and families. There are two types of notes:

- **General Notes** are viewed via the **Notes History** tab.
- **Confidential Notes** can only be viewed by users with a high level of permission.

Your ability to view or create general notes and confidential notes depends on your level of permissions (see the *eStart Web Administrator Handbook* for more details).

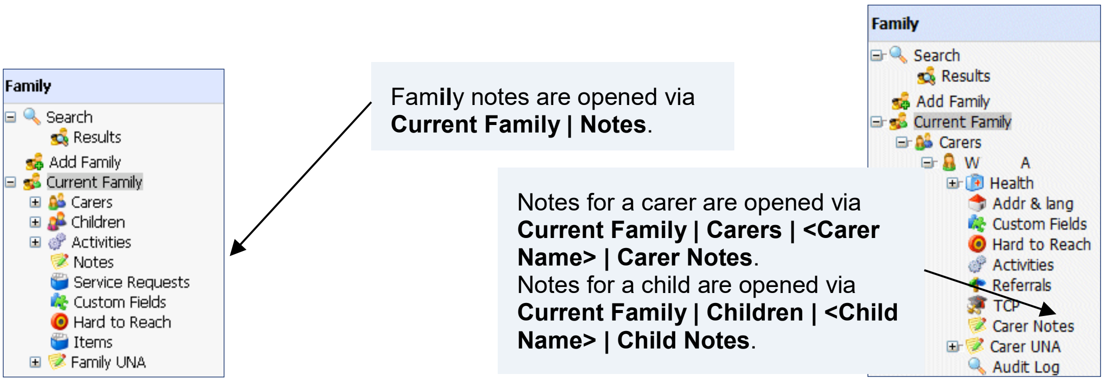


Figure 51 Family Notes

Figure 52 Carer Notes

A screen with three tabs is displayed. The first tab is **Notes History**.

Notes History Tab

The **Notes History** tab gives details of any general notes and enables you to add new notes.

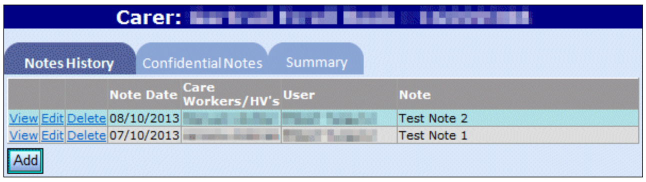


Figure 53 Notes History tab

1. Click the **Add** button to open the text editor.

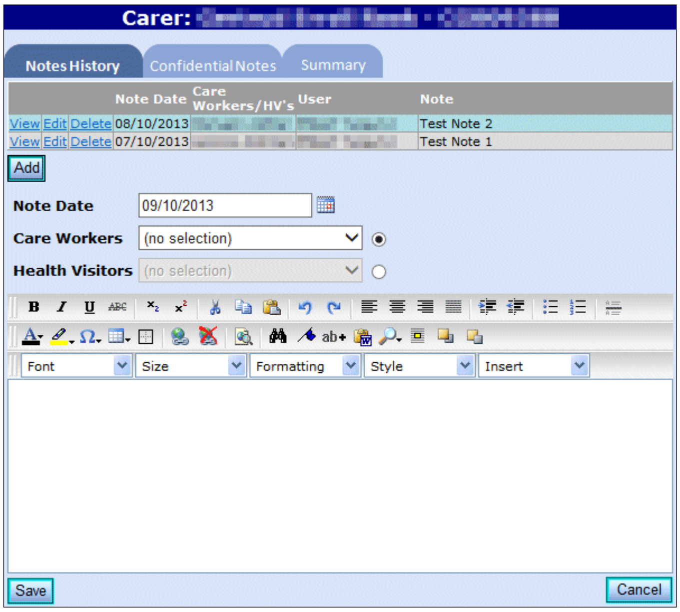


Figure 54 Individual Note History

2. Select the date.
3. Optionally, click the care worker or health visitor radio button and select the name from the drop-down list.
4. Type the note, then click the **Save** button.

   Users with suitable permissions can **View**, **Edit** or **Delete** existing notes by clicking the hyperlinks to the left of the **Note Date**.

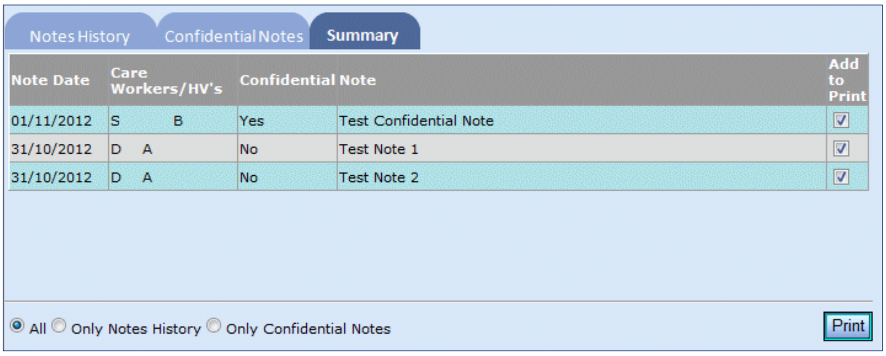
Confidential Notes Tab

This tab displays the same options as the **Notes History** tab but is intended for notes of a private nature. Only users with a suitably high level of permission can view or add confidential notes.

Summary Tab

The **Summary** tab displays a list of notes for the selected carer, child or family. By default all the notes that you have permission to view are listed. Select the **Notes History** or **Confidential Notes** radio button (the confidential notes option is only available if you have the correct permission level to view confidential notes), to display one type or the other.

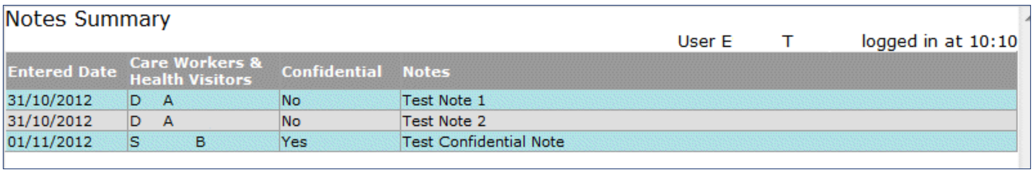
Notes cannot be viewed, edited or deleted from the **Summary** tab.



Note Date	Care Workers/HV's	Confidential	Note	Add to Print
01/11/2012	S B	Yes	Test Confidential Note	☑
31/10/2012	D A	No	Test Note 1	☑
31/10/2012	D A	No	Test Note 2	☑

Figure 55 Notes Summary tab

Select the **Add to Print** check boxes and click the **Print** button to display a printable version of the selected notes. The notes can then be sent to a printer or printed to a file.



Entered Date	Care Workers & Health Visitors	Confidential	Notes
31/10/2012	D A	No	Test Note 1
31/10/2012	D A	No	Test Note 2
01/11/2012	S B	Yes	Test Confidential Note

Figure 56 Printable Notes Summary

Service Requests

Service Requests can be added to a family's account if the family has been referred to an external agency. eStart can then record assessments on the family.

Click **Current Family | Service Requests.** then click the **New Service Request** button.

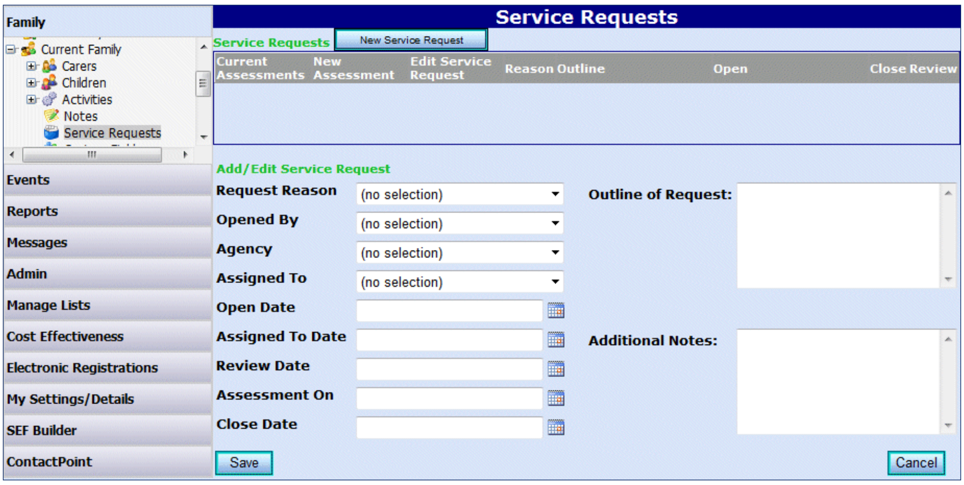


Figure 57 Family | Service Requests

Complete the fields, enter comments into the **Outline of Request** and **Additional Notes** fields if required, and click the **Save** button.

> ***Note**: Administrators can add more items to these dropdown lists via **Admin | Manage DropDowns | Service Requests**.*

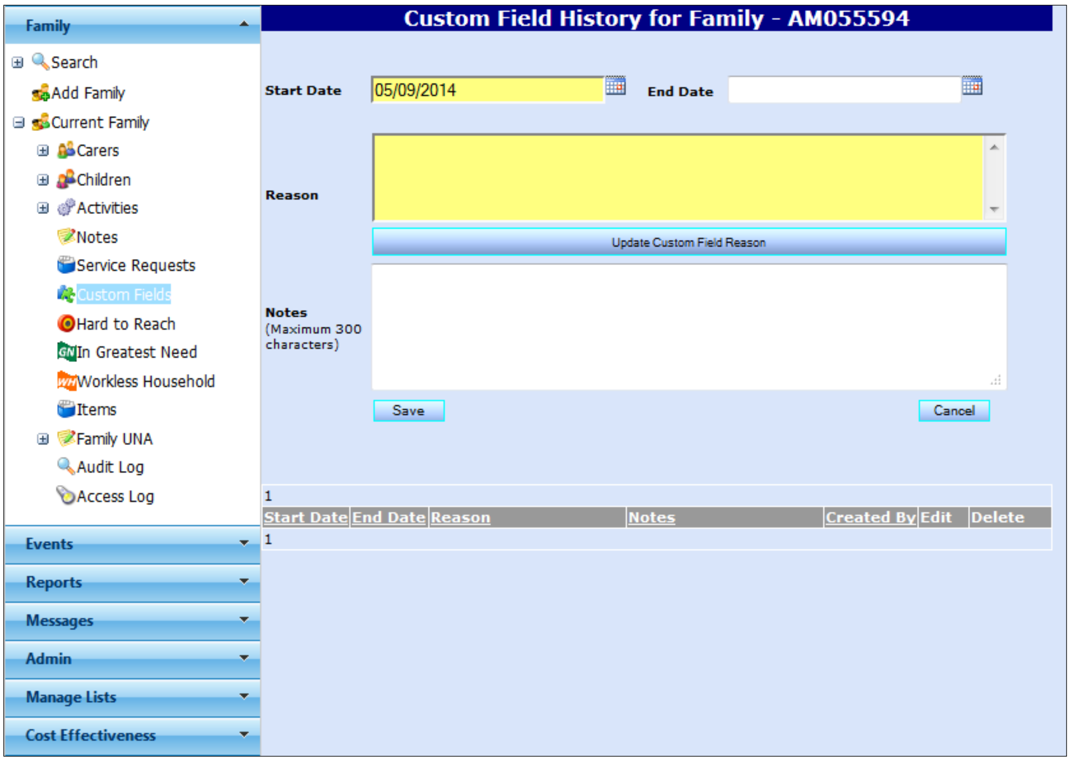
Custom Fields

> ***Note**: These reports are for families only. Additional reports are available through the **Reports** menu.*

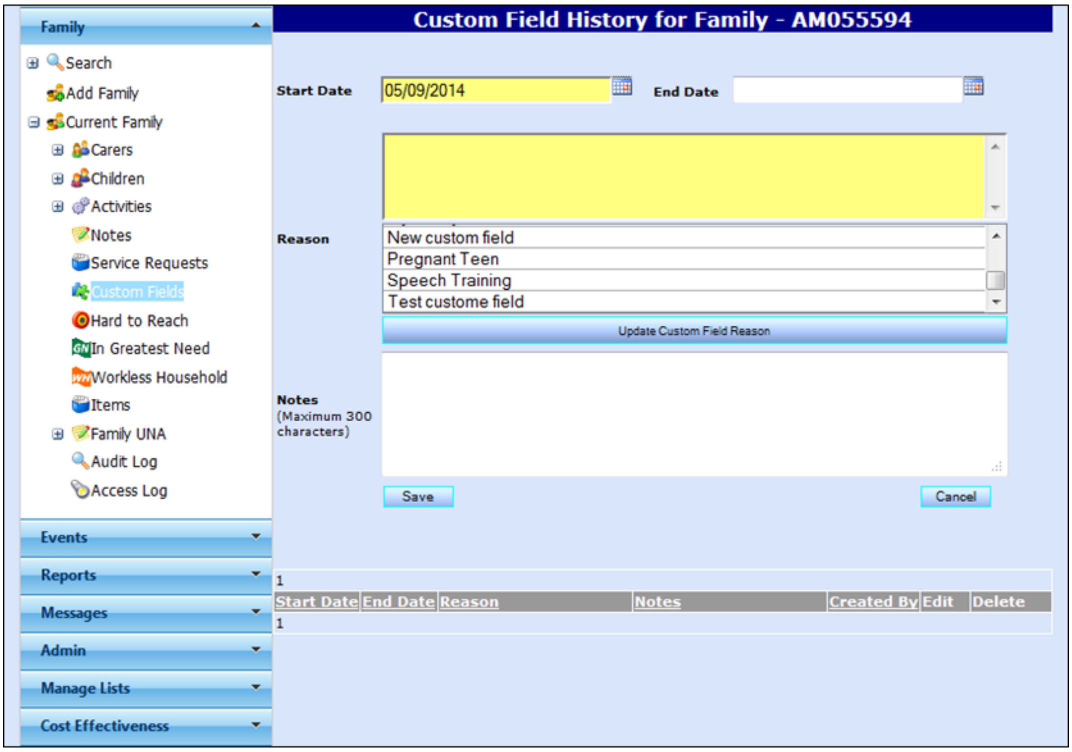
The **Custom Fields** area enables you to generate reports on statistical data. When one of the fields is selected, a report can be run to produce a list of all families who had this option selected.

To record custom field details:

1. From within the current family, select **Current Family | Custom Fields** to display the **Custom Field History for Family** page.

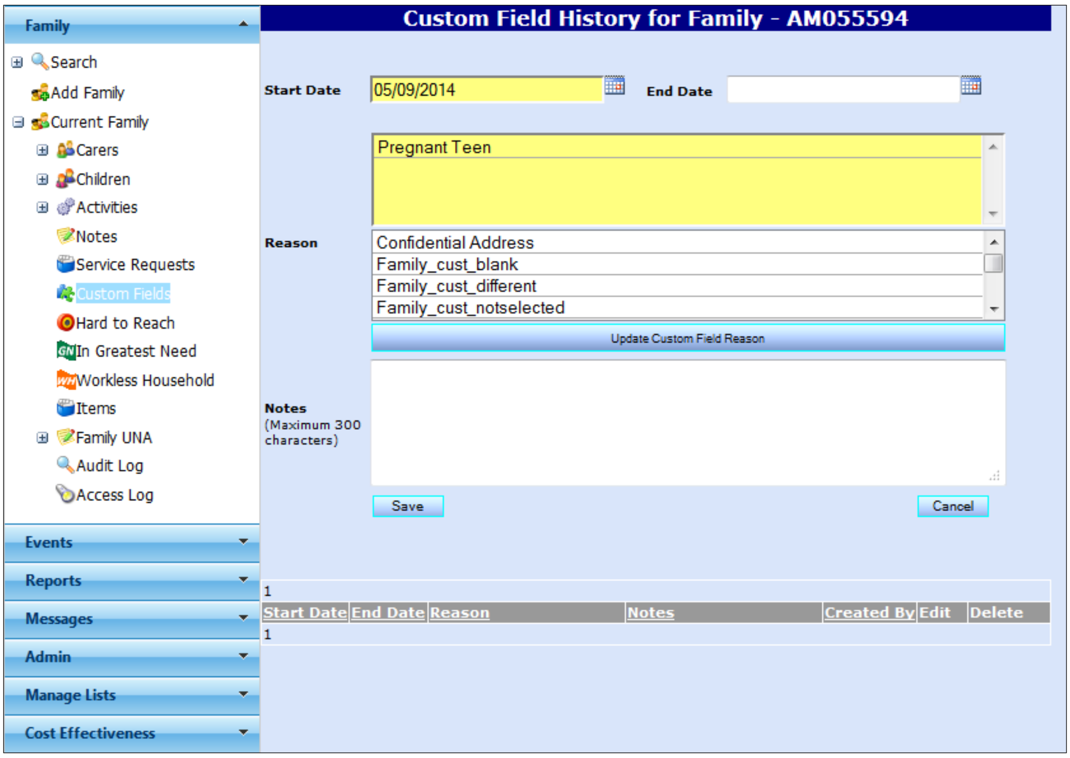


2. If required, select a different **Start Date**.
3. If required, select an **End Date**.
4. Add a **Reason**:
   a. Click the U**pdate Custom Field Reason** button to display list of available reasons.



   b. Click an item in in the list to add it to the field above (with a yellow background).

   If you need to remove an item from the yellow field, click the item in the yellow field and it will be returned to the list of unused reasons.



c. After adding all the required reasons, click the **Update Custom Field Reason** button again to close the list of available reasons.

5. If required, add any **Notes**.
6. Click the **Save** button. A confirmation dialog is displayed.
7. Click the **OK** button. The entry is now visible in the table at the bottom of the page.

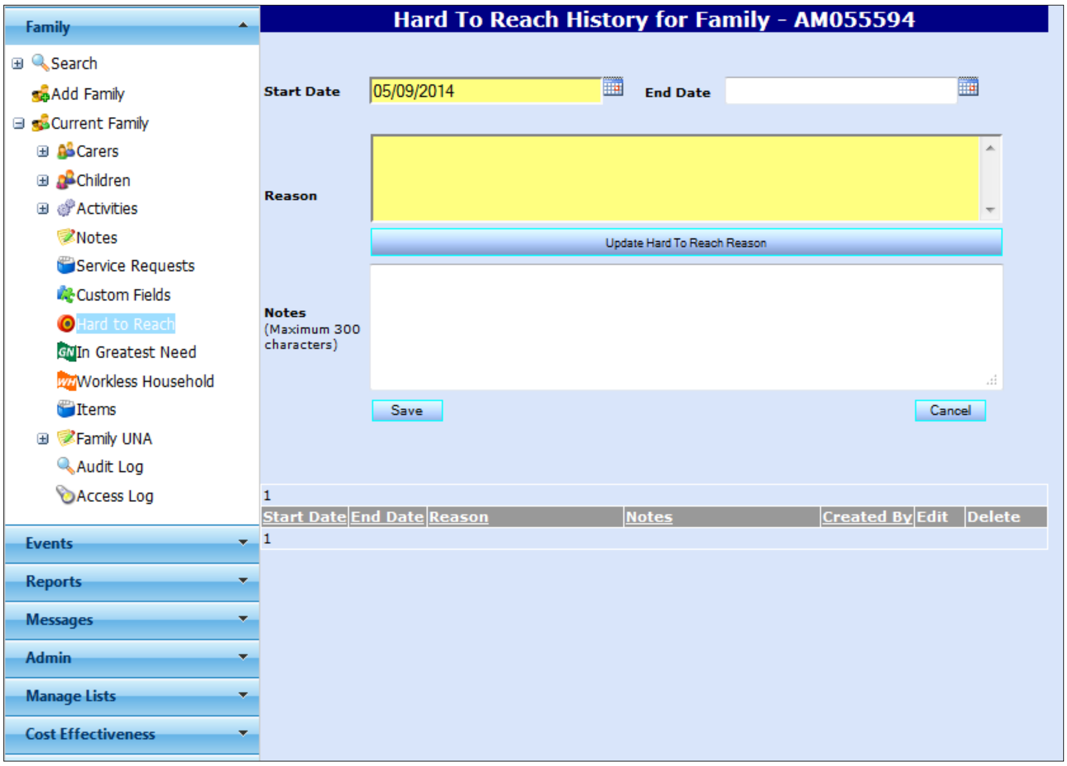
> ***Note**: Administrators can add more criteria via **Admin | Manage DropDowns | Custom Labels**. See the **eStart Web Administrator Handbook** for more information.*

Hard to Reach

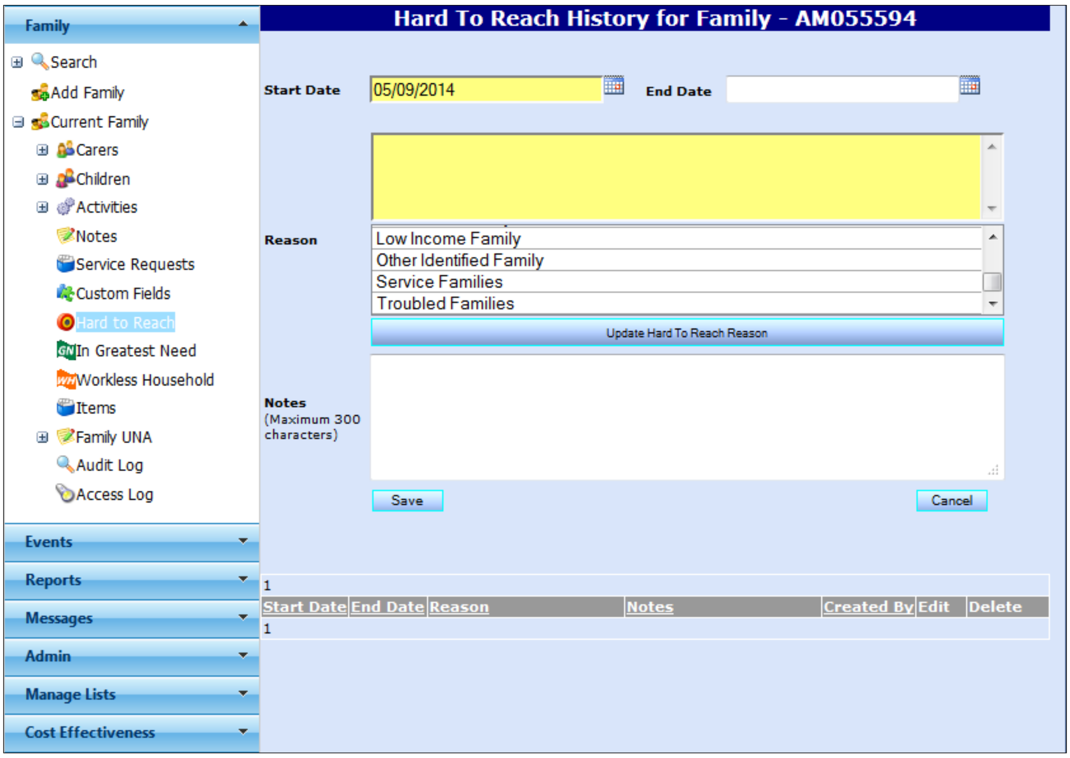
The **Hard to Reach** page (**Family | Current Family | Hard to Reach**) enables the recording of information about a family highlighting that they meet certain criteria for reporting. When a report is generated, it includes all families who have at least one of these criteria selected. Some of these are used to judge if they are classed as being **In Greatest Need** for the purposes of **Payment by Results**. For more information, see Identifying Families who are In Greatest Need on page *45*.

To record hard to reach details:

1. From within the current family, select **Current Family | Hard to Reach** to display the **Hard to Reach History for Family** page.

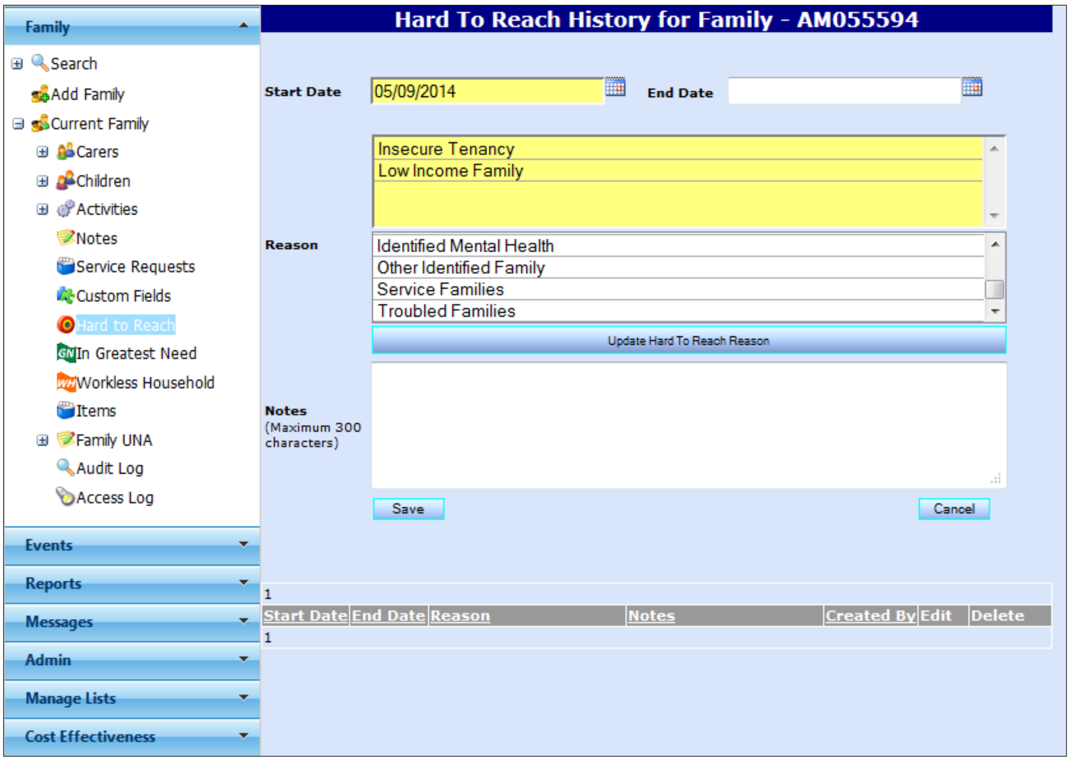


2. If required, select a different **Start Date**.
3. If required, select an **End Date**.
4. Add a **Reason**:
   a. Click the **Update Hard To Reach Reason** button to display list of available reasons.



   b. Click an item in in the list to add it to the field above (with a yellow background).

   If you need to remove an item from the yellow field, click the item in the yellow field and it will be returned to the list of unused reasons.



c. After adding all the required reasons, click the **Update Custom Field Reason** button again to close the list of available reasons.

5. If required, add any **Notes**.
6. Click the **Save** button. A confirmation dialog is displayed.
7. Click the **OK** button. The entry is now visible in the table at the bottom of the page.

> ***Note**: Administrators can add more criteria via **Admin | Manage DropDowns | Custom Labels**. These must have the **Hard to Reach** check box selected when they are added – see the* eStart Web Administrator Handbook *for more information.*

In Greatest Need – Payment by Results

It is important to identify the families who are in greatest need of early intervention, so that they can be provided with suitable targeted support. The **Payment by Results** trial (PbR) is a government scheme whereby payments to Local Authorities are made to reward progress with these families against the main aims of Sure Start. The measures to be used were announced by the DfE in March 2012 as:

- To reduce inequalities in child development, school readiness, health and life chances.
- To improve parenting aspiration and skills.

This is judged by the following criteria:

- Increasing the school readiness of young children by:
  - Narrowing the gap in attainment through the Early Years Foundation Stage Profile.
  - Increasing take up of the two year old free entitlement for disadvantaged two year olds.
  - Increasing take up of early education amongst disadvantaged three year olds
- Improving health and child development by increasing the prevalence of breastfeeding at 6-8 weeks.

- Improving parenting skills and support provided to families in need of children's centre services by:
  - Increasing the proportion of families in greatest need completing evidence based parenting programmes[3].
  - Increasing the proportion of families with children under 5 years old who are identified as being in greatest need and have sustained contact[4] with children's centres in the local authority area.

These DfE criteria are the national measures of success. In addition, each Local Authority has also defined a series of appropriate local measures. The local measures are used together with the national measures to calculate success or failure for the purposes of PbR.

Identifying Families who are In Greatest Need

For the purposes of the one year trial, the meaning of **In Greatest Need** is defined locally. Each Local Authority has identified a group of risk factors appropriate to their area, to ensure that all their children's centres take a standardised approach. This makes measuring the criteria fairer. Some examples of risk factors that might be used are:

- Low birth weight
- Child with a physical disability
- Low income (the definition of low income may vary depending on the number of children in the family and the Local Authority area)
- Parent has or had a drug or alcohol dependency
- Teenage parent

The DfE are working with HMRC during the trials to develop a national measure based on eligibility for free schools meals.

Some of a family's risk factors will improve over time as their needs are addressed. Conversely, a family's situation might worsen due to other risk factors, for example unemployment, long term illness or a mother's post natal depression. Families will, therefore, move in and out of being at greatest need and this can be recorded in eStart.

---

[3] *These are parenting programmes that show strong evidence of effectiveness in supporting children and parents, as assessed by the National Academy of Parenting Research (NAPR).*
[4] *At least five face to face contacts with Children's Centre services over a 12 month period.*

In Greatest Need History

To indicate that a family fulfils the current criteria for being in greatest need of early intervention, click the **In Greatest Need Details** button on the **Family** screen or follow the route **Family | Current Family | In Greatest Need**. The **In Greatest Need History** screen is displayed.

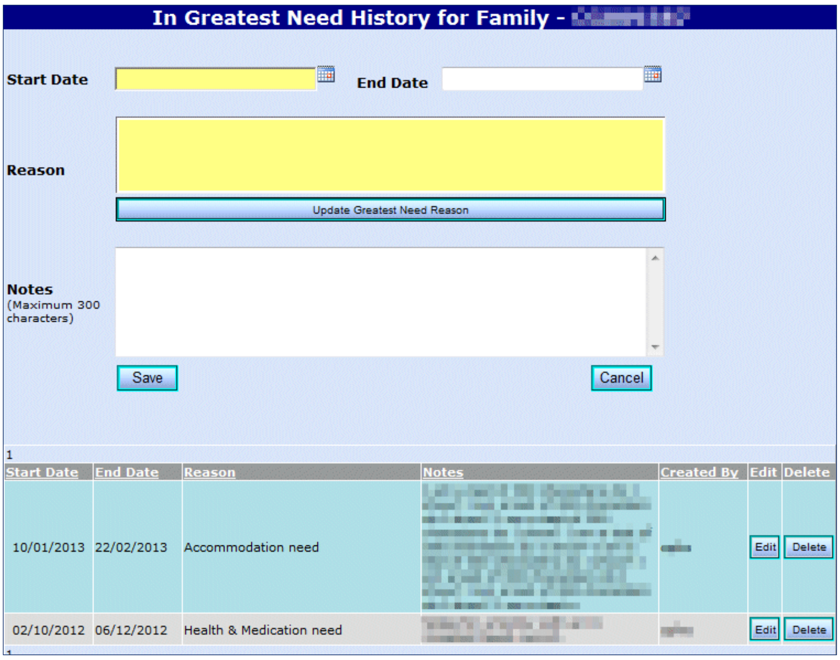


Figure 58 In Greatest Need History

The lower section of the page lists all the occasions when this family were in greatest need, with the most recent record at the top. Records with **End Dates** are historical and those with no end date are current. There can be any number of historical records because a family may dip in and out of greatest need as their circumstances change, but there can only ever be one current record. Record dates cannot overlap. The **End Date** of an earlier record must be at least the day before the **Start Date** of the next record.

1. Enter a **Start Date** (mandatory) to begin a new **In Greatest Need** record.
2. Click the **Update Greatest Need Reason** button and select a reason (mandatory).
3. If necessary, use the **Notes** field t record additional information about the record. This holds up to 300 characters. The number of characters remaining is displayed as you type.
4. Click the **Save** button to add the new record to the list.

The **In Greatest Need** icon is now displayed on the main **Family** screen.

Click the **Edit** button to make changes to the notes or to add an **End Date**. Once an end date has been entered and saved, the family will no longer be considered to be in greatest need of early intervention.

Click the **Delete** button to remove a record.

Clicking the column headers sorts the historical records by date or alphabetically. Click the header a second time to reverse the sort. The default sort is by **Start Date**, with the newest record first.

> ***Note**: Administrators can add more reasons via **Admin | Manage DropDowns | Family | In Greatest Need Reasons**.*

Workless Households

eStart provides the **Workless Household History** screen to list all the periods during which no adult members of the family were in employment, with the most recent record at the top. Records with **End Dates** are historical and those with no end date are current. There can be any number of historical records because a family may dip in and out of being workless as their circumstances change, but there can only ever be one current record.

Workless Households are classed as those where no adult members are employed. Ofsted are reporting on children in workless households to ensure that they receive suitably targeted support.

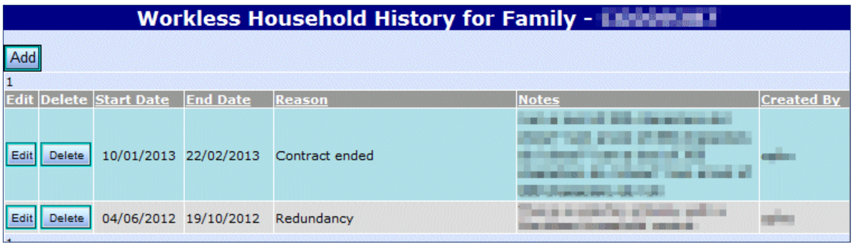
Workless Household History

From the **Workless Household History** page, you can do the following:

1. Click the **Edit** button to make changes to a record e.g. adding an End Date or Notes.
2. Click the **Delete** button to remove a record.
3. Click the **Add** button to display the complete **Workless Household History** page and enter the details of a new record.

   To indicate that a family has no employed adult members:

4. Click the **Workless Household Details** button on the **Family** screen or follow the menu route **Family | Current Family | Workless Household** to display the Workless Household History page.



Workless Household History for Family - [redacted]

Add

1

Edit	Delete	Start Date	End Date	Reason	Notes	Created By
Edit	Delete	10/01/2013	22/02/2013	Contract ended	[redacted]	[redacted]
Edit	Delete	04/06/2012	19/10/2012	Redundancy	[redacted]	[redacted]

Figure 59 Workless Household History

5. Click the **Add** button to display the complete Workless Household History page.

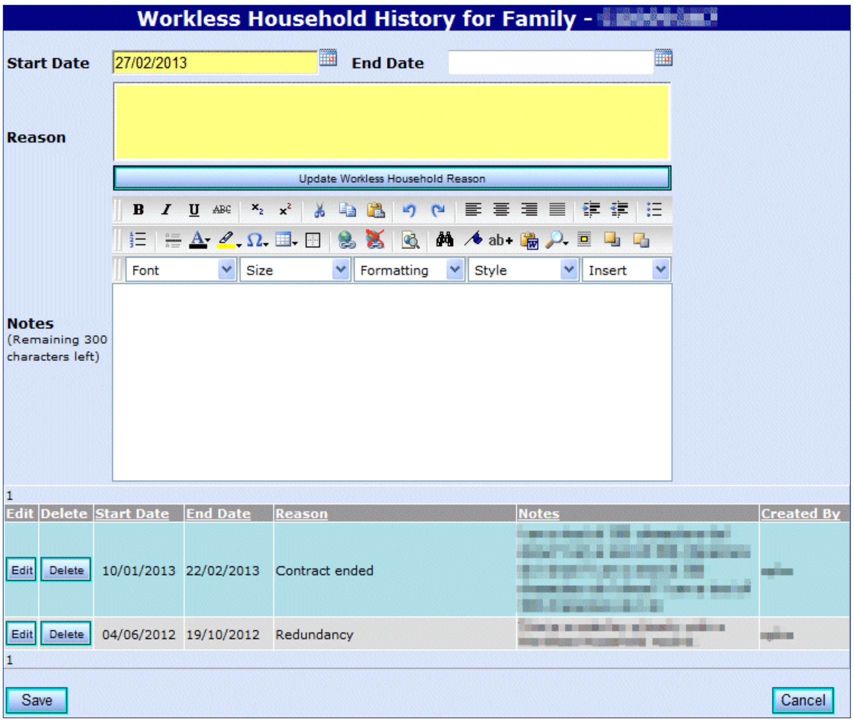


Figure 60 Add a new Workless Household record

6. Enter a **Start Date** (mandatory) to begin a new **Workless Household** record.

   Record dates cannot overlap; the **End Date** of an earlier record must be at least the day before the **Start Date** of the next record.

7. Click the **Update Workless Household Reason** button and select a reason (mandatory).
8. If necessary, use the **Notes** field to record additional information about the record.

   This holds up to 300 characters. The number of characters remaining is displayed as you type.

9. Click the **Save** button to add the new record to the list.

   The **Workless Household** icon is now displayed on the main **Family** screen.

   Clicking the column headers sorts the historical records by date or alphabetically. Click the header a second time to reverse the sort. The default sort is by **Start Date**, with the newest record first.

> ***Note****: Administrators can add more reasons via* ***Admin | Manage DropDowns | Family | Workless Household Reasons****.*

Items

The **Items** section enables you to record the loan of items or material to a family.

1. Select **Add New** and choose an item from the dropdown list.
2. Added any required dates.
3. Click on **Insert** to add it to the family's record.
4. Later, you can click the **Edit** hyperlink to change any of the details for this item, and click **Update** to save the changes.

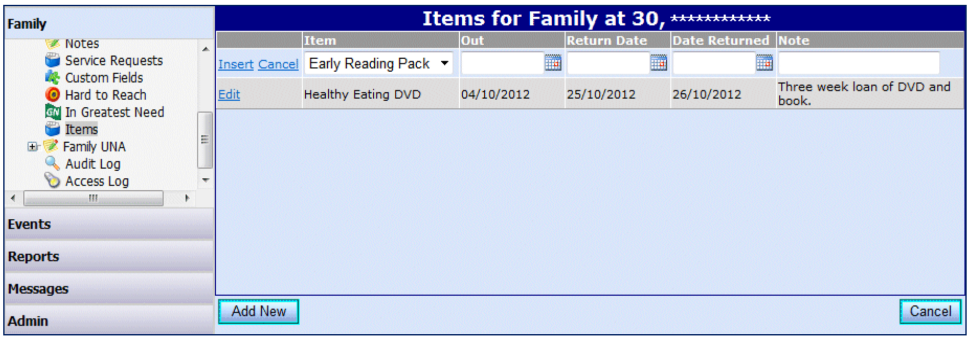


Figure 61 Family | Items

Audit Log and Access Log

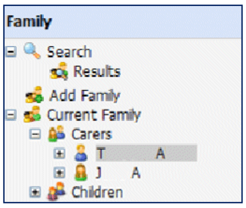
If you have permission to access these areas, the **Access** and **Audit** logs within eStart allow you to see who has viewed or made changes to a particular carer, child or family record within a selected date range, and to see which items within a record were changed or viewed.

For a more detailed explanation of these areas, please see Monitoring eStart Use *on* page *65*.

06 | Carer Record

Carer Details

To view or edit the details of a carer, use the search facility to display the **Family Details** screen. Then, either click on their name in the left-hand menu or click on the blue arrow next to their name in the list of family members on the right-hand side to open their record.



When you have accessed the **Family Details** screen, click on a carer's name in the left-hand menu or click on the blue arrow) next to their name in the list of current family members.

The **Carer Details** screen is displayed:

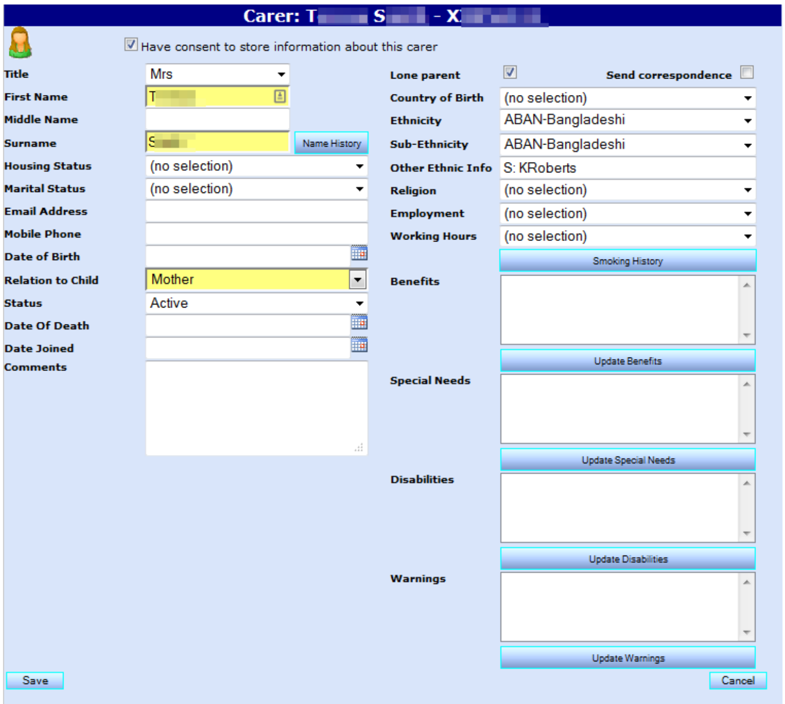


Figure 62 Carer Details screen

This screen displays the carer's basic details, which can be edited from here.

Name History

If the carer's name was entered incorrectly or has changed since they registered, click on **Name History**, then click the **Change Name** button.

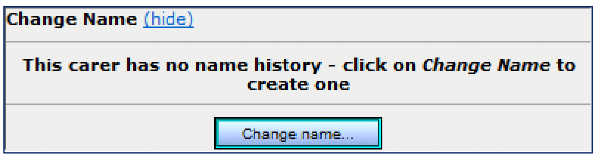


Figure 63 Name History

***Note**: You can only access **Name History** if you have the correct permission level set for your account.*

The following screen is displayed, showing the current name details. Make all the necessary changes or additions and select a **Reason for Change** (mandatory). Click the **Save** button.

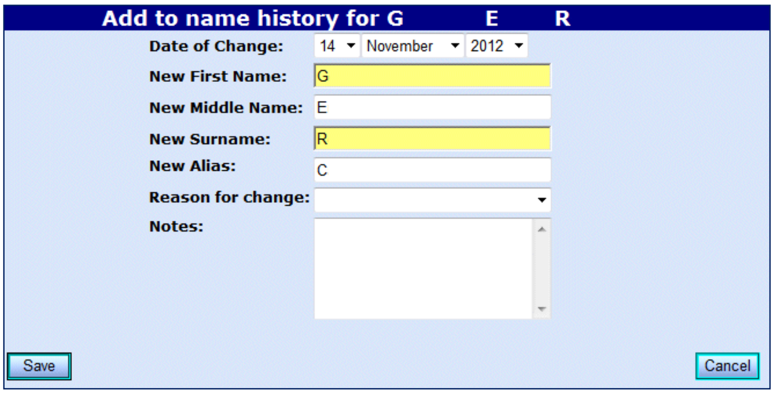


Figure 64 Name Change Details

> ***Note**: Administrators can add more reasons via **Admin | Manage Dropdowns | Member | Name Change Reasons**.*

Status

This dropdown enables you to record whether an individual carer or child is active or inactive and, if they are inactive, the reason for this. The entries in the list are defined by console administrators via **Admin | Manage Dropdowns | Member | Inactive Descriptions**.

When you make a person inactive, their open affiliations and registrations will be ended. All involvements for this member that do not have an end date or that have an end date in the future, have the end date set to today's date.

> ***Note**: The involvement end date is displayed (and can be edited) in the **Involvement Ended** field on the **Setting Involvement Details** screen that is opened when you click the **Registration and Affiliation Details** button on the **Family** screen.*

If you need to delete a member's record from eStart (see Delete a Carer on page *54*), you first need to make them inactive.

Date of Death

You cannot save a **Date of Death** for a person unless their status has already been set to inactive.

Smoking History

To add or update a Smoking History for the carer, click on the **Smoking History** button, then click on **Change Smoking History**. The following dialog is displayed (this dialog is displayed at the top of the eStart screen so you may need to scroll up if it isn't visible).

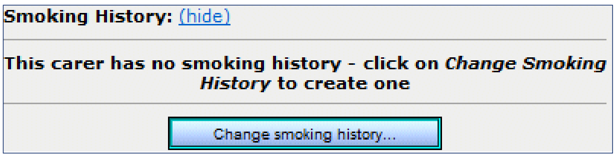


Figure 65 Smoking History | Change Smoking History

Update all the requested information. A **Reason for Change** is mandatory. Click the **Save** button.

Figure 66 Smoking History Change Details

> ***Note**: Administrators can add more reasons via **Admin | Manage Dropdowns | Health | Smoking Change Reasons**.*

Benefits

To add information about any benefits this carer is receiving (e.g. Jobseeker's Allowance or a disability benefit), click on the **Update Benefits** button to display a list of benefits in the lower box.

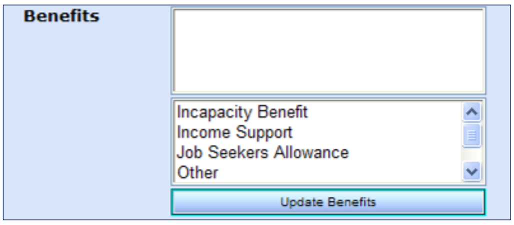


Figure 67 Update Benefits Information

Select a benefit from the list in the lower box. Your selection now appears in the **Benefits** box above. Remove a benefit from the upper box in the same way, by selecting it to move it back to the lower box. To finish, click the **Save** button in the bottom left hand corner of the main screen.

> ***Note**: Administrators can add more benefits via **Admin | Manage Dropdowns | Carer | Benefits**.*

Special Needs

To add this information, click on the **Update Special Needs** button.

Figure 68 Update Special Needs

Select a special need from the list in the lower box. Your selection now appears in the **Special Needs** box above. You can remove a special need from the upper box by selecting it. To finish, click the **Save** button in the bottom left hand corner of the main screen.

> ***Note**: Administrators can add more special needs via **Admin | Manage Dropdowns | Health | Special Needs**.*

Disabilities

To add this information, click on the **Update Disabilities** button.

Figure 69 Update Disabilities

Select a disability description from the list in the lower box. Your selection now appears in the warning box above. Remove a description from the upper box by selecting it. To finish, click the **Save** button in the bottom left-hand corner.

> ***Note**: Administrators can add more disability descriptions via **Admin | Manage Dropdowns | Health | Disabilities**.*

Warnings

Warnings act as alerts to care workers and other staff who visit sites which may have restrictions or other aspects they need to be aware of. Click the **Update Warnings** button to add a warning to this carer's record.

Figure 70 Update Warnings

Select a warning description from the list. Your selection moves to the **Warning** box above. You can remove a warning from the upper box by selecting it. To finish, click the **Save** button in the bottom left hand corner of the main screen. A yellow warning triangle is now displayed on the **Family Details** screen (see *Family Icons* on *page 30*).

Figure 71 Add Warnings

> ***Note**: Administrators can add more warning descriptions via **Admin | Manage Dropdowns | Warning Descriptions**.*

Delete a Carer

1. First, set the status of the individual to inactive.
2. Click the **Save** button. A **Delete** button is displayed.
3. Click the **Delete** button to remove the person from the system.

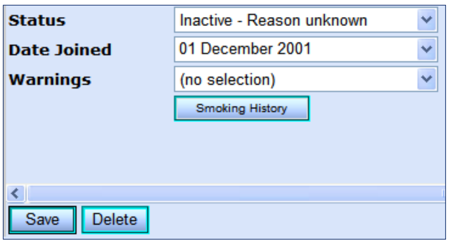


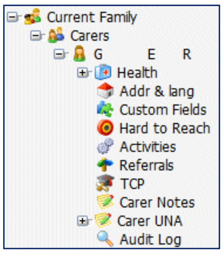
Figure 72 Delete a Carer

> ***Note**: Administrators can add more status options if needed. Please see* [*Status*](#) *on page 52 for more information.*

A message is displayed to warn you that once deleted, a record cannot be recovered.

All the Events that the Carer had previously attended are also deleted.

Carer's Record - Additional Details



More details can be added to a Carer's record. These are listed in the left-hand menu. Many of these are explained in the **Family** section.

Figure 73 Additional Details for a Carer's Record

Health

eStart can be used to monitor the health of a carer over a period of time, using measurements of criteria taken at different events. **Health | History** enables the recording of this information.

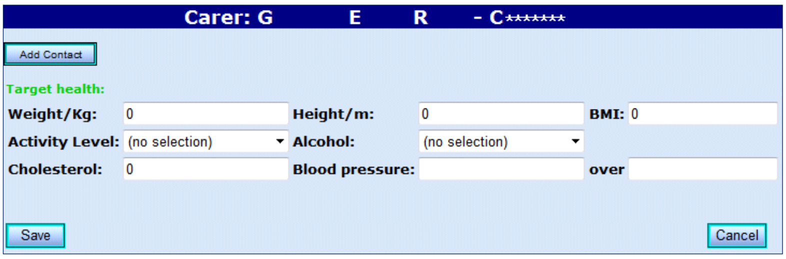


Figure 74 Carer | Health | Target Health

Enter the carer's height then either the BMI or weight they are trying to achieve. When a weight and height are both recorded, the BMI is calculated automatically using:

BMI = Weight in Kilograms / (Height in Meters x Height in Meters)

If you enter their height and a target BMI, eStart automatically calculates the target weight to achieve this BMI. Click the **Save** button.

When a carer has attended an activity or event at which new measurements of the criteria were taken (i.e. there has been a contact), these can be recorded against the specific event. Click the **Add Contact** button to display the **Update Health Details** screen:

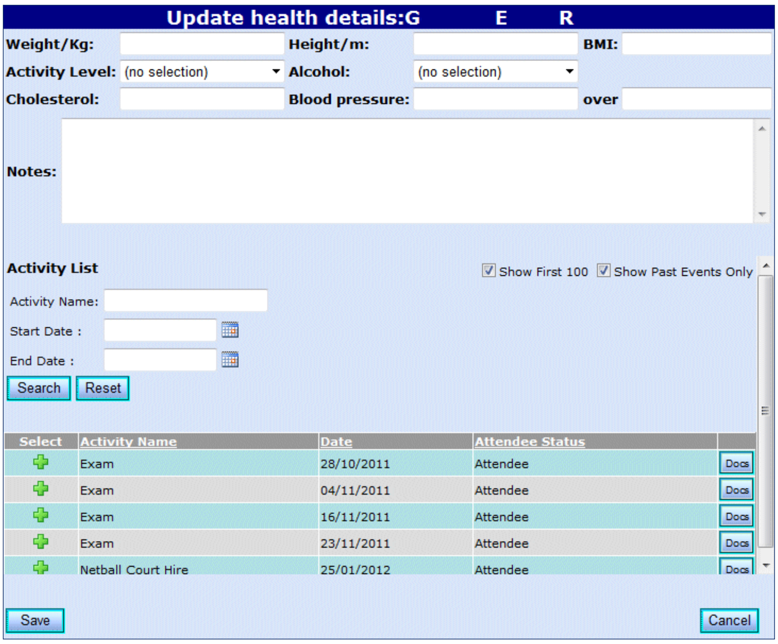


Figure 75 Update Health Details

Filter the list by entering part or all of an **Activity Name**, and a date range. The check boxes in the upper right-hand corner enable you to limit the number of activities listed to the first 100 results or to show only past events.

You cannot add a new activity or event from here; they must be added via **Current Family | Activities | New Contact**.

Click the green cross to select the appropriate activity, enter the new health details in the fields above, and click the **Save** button.

The **Health History** screen is displayed, showing the **Target Health** details and the **Most recent** and **Oldest recorded health** details (if different).

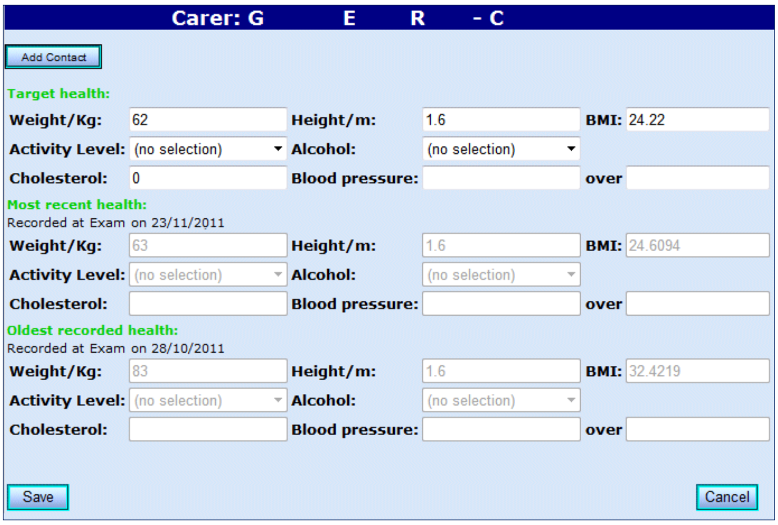


Figure 76 Health History

You can make changes to the targets but you cannot change the historical data from here.

Pregnancy

This is only available for female carers and is also displayed as part of the **Add Carer** screen.

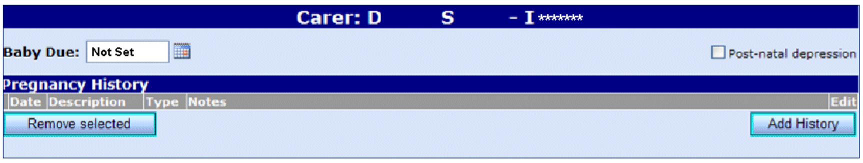


Figure 77 Pregnancy Details 1

1. Select the baby's due date. The pregnant carer icon (see Family Icons on page *30*) is now displayed on the **Family** screen of the pregnant carer.
2. Click the **Save** button to display the **Baby Born** and **Pregnancy Ended** buttons.

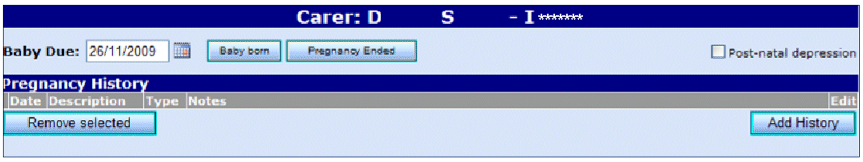


Figure 78 Pregnancy Details 2

3. When the carer has given birth, click the **Baby Born** button to display the **Add Child** screen enabling you to add in the new child information.
4. Complete the **Add Child** wizard. Full details on adding a child start in the Step 9: Add Child – Basic Details topic on page *25.* When completed, the baby's details screen is displayed.
5. Review the details and click the **Save** button. The pregnant carer icon is no longer displayed on the **Family** screen.
6. To add more details for this and any previous pregnancies to the carer's record, click the **Add History** button and enter the appropriate details:

Figure 79 Add Pregnancy History

This information is added to the history on the **Pregnancy Details** screen.

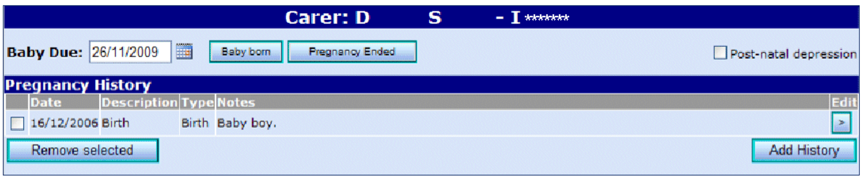


Figure 80 Pregnancy Details with history

7. Alternatively, record the ending of a pregnancy by clicking the **Pregnancy Ended** button:

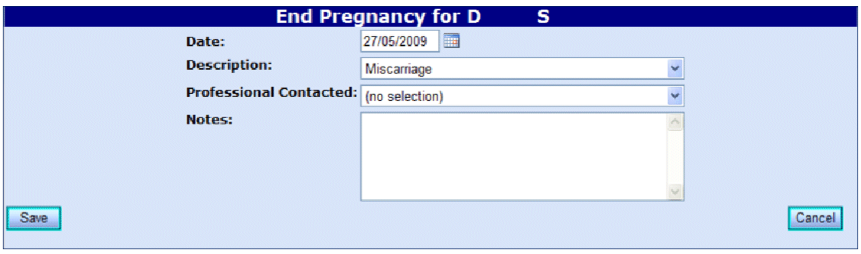


Figure 81 Pregnancy Ended Details

Choose a suitable description, complete the other details on this screen if appropriate, then click **Save**. The pregnant carer icon is no longer displayed on the **Family** screen.

Address and Languages

This screen should be used if the carer has been registered with a family but is living elsewhere, for example, a parent who has moved out of the family home. It enables you to change their address from that of the family, and also to record their languages and their standard of English.

1. Using the left hand menu, choose the family member and click on **Address & Languages**.

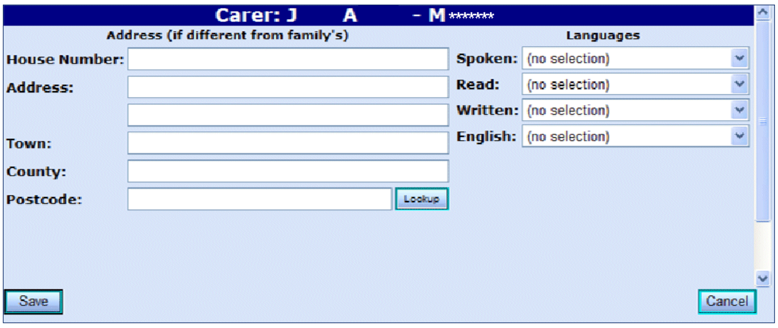


Figure 82 Changing the address for an individual

2. Enter their address details.
3. Click the **Save** button.

   You have now added an address for the carer that is different to the family's address.

   Different languages used by the carer can be added using the **Languages** dropdowns lists.

07 | Child Record

Child Details

The **Child Details** screen displays the basic information about the child. This information was entered when the family was added to eStart. For more information please see Step 9: Add Child – Basic Details on page *25,* and subsequent topics.

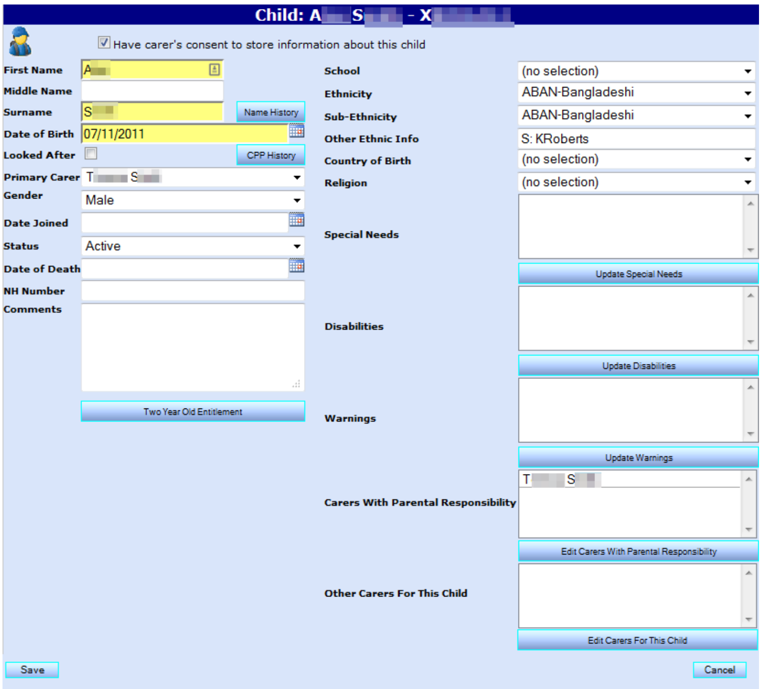


Figure 83 Child Details screen

If the entry you need is not available in the lists of **Special Needs**, **Disabilities** and **Warnings** you will need to contact an eStart administrator who can add it in for you.

Date of Death

You cannot save a date of death for a child unless their status has been set to inactive.

Lists of Carers

There are two lists of carers for a child, those with **Parental Responsibility** and **Other Carers for this Child**. Anyone who has been added as a carer for the family is initially included in both dropdown lists for selection, however when you select a name from one list to define them as a specific type of carer, they cannot then be selected from the other list i.e. the two types are mutually exclusive.

- **Carers with Parental Responsibility** are those carers who have legal rights and obligations in making decisions which affect the child's life.
- **Other Carers for this Child** might include, for example, an adult within the household who is the parent of other children within the same family but not of this child. Such people might be carers but would not necessarily have parental responsibility.

CPP History

If the child is the subject of a Child Protection Plan (CPP) or has been in the past, the **CPP History** button displays a historical record of this, and enables you to add new records.

NOTE: Child Protection Plan (CPP) was previously Child Protection Register (CPR).

1. Click the **CPP History** button to display the **CPP History** dialog:

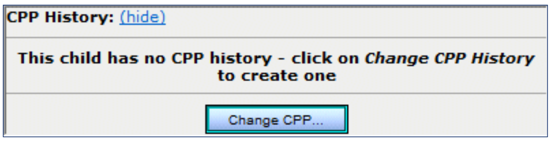


Figure 84 Child | Change CPP History (no CPP history)

If the child already has a child protection history, basic information is included in the CPP History dialog:

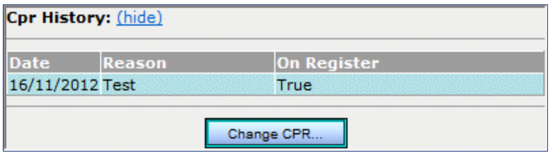


Figure 85 Child | Change CPP History (with CPP history)

2. Click the Change CPP button to display the Add to CPP History screen.
3. To add the first record, click the **Add** button and enter the **Date of Change**, the **Reason** for the child's inclusion on a CPP and any **Notes**. Select the **On Register** check box if necessary.

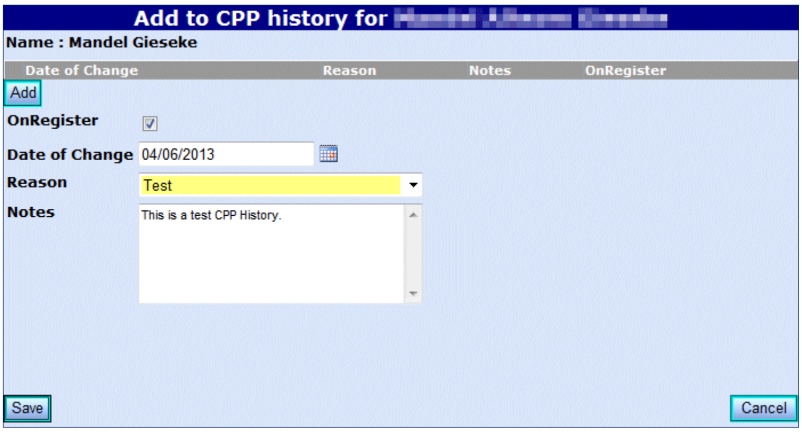


Figure 86 Child | Adding a new CPP History

The **On Register** check box controls whether or not this information is visible on the **Family** screen. Use the check box to indicate when a child is put on or taken off the register or plan, including the date of the change, adding notes if necessary.

4. Click the **Save** button. The new record is displayed on the **Add to CPP History** screen:

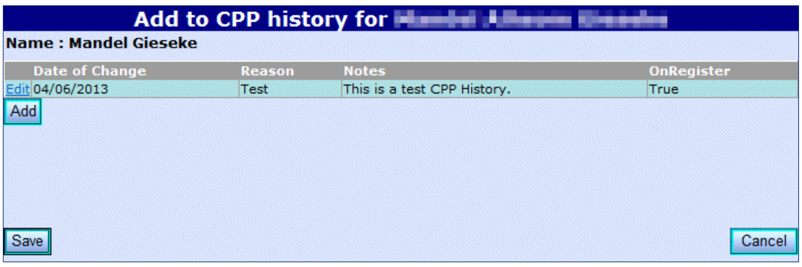


*Figure 87 Child | **Add to CPP History** screen with new record added*

5. To edit an existing record (for example to add notes or to deselect the **On Register** check box), select the **Edit** hyperlink to display the record, and make the appropriate changes.

> ***NOTE:*** *You should always consider whether it is more appropriate to edit an existing child protection record, or to add a new one. Although all changes are recorded in the child's audit log, adding a new record retains an easily accessible history in eStart.*

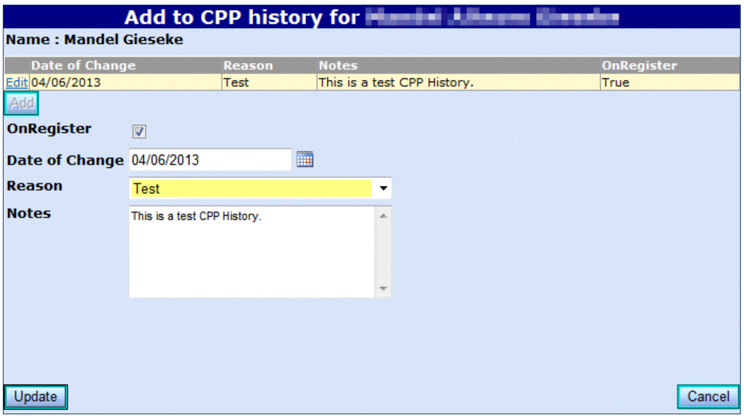


Figure 88 CPP History – Edit

6. Click the **Update** button to save the changes.

Two Year Old Entitlement

The two year old entitlement is an offer of 10-15 hours a week of free early education, targeted at some of the most disadvantaged two year olds. In May 2012, the Government confirmed that two year olds who are in public care or who live in households that meet the eligibility criteria for free school meals would be entitled to a free early education place from September 2013. This includes approximately 20 per cent of two year olds. The eligibility criteria will be further widened from September 2014 to include approximately 40 per cent of two year olds.

An increasing take-up of the free entitlement for disadvantaged two year olds is one of the criteria used in the assessment of **Payment by Results** (PbR).

Clicking the **Two Year Old Entitlement** button on the **Child Details** screen displays the **Two Year Old Entitlement** screen:

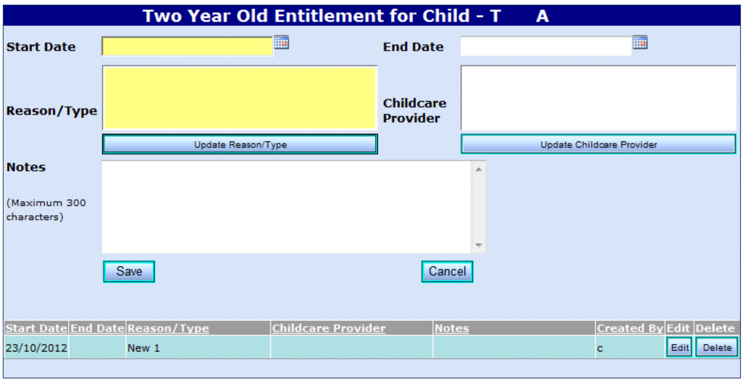


Figure 89 Two Year Old Entitlement screen

The lower section of the page lists all the periods during which the child has been in receipt of the **Two Year Old Entitlement**, with the most recent record at the top. Records with an **End Date** are historical and those with no end date are current. A child may cease to be entitled and then become entitled again, so there can be any number of historical records. There can only be one current record and record dates cannot overlap; the **End Date** of an earlier record must be at least the day before the **Start Date** of the next record.

1. Enter a **Start Date** to begin a new **Two Year Old Entitlement** record, then click the **Update Reason/Type** button and select a reason. These are both mandatory. The optional **Notes** field enables the recording of additional information about the record and holds up to 300 characters. The number of characters remaining is displayed as you type.
2. One or more **Childcare Providers** can be recorded. Click the **Update Childcare Provider** button and select the provider names.
3. Click the **Save** button to add the new record to the list. The **Two Year Old Entitlement** icon is then displayed on the **Child Details** screen and on the main **Family** screen.

   Click the column headers to sort the historical records by date or alphabetically, as appropriate. Click a second time to reverse the sort. The default sort is by **Start Date**, with the newest record first.

   Click the **Edit** button to make changes to the notes or providers, or to add an **End Date**. Once an end date has been entered and saved, the child will no longer be recorded as being in receipt of the Two Year Old Entitlement. Click the **Delete** button to remove a record.

Delete a Child

1. First, set the **Status** of the child to one of the inactive reasons.
2. Click the **Save** button. A **Delete** button is displayed.

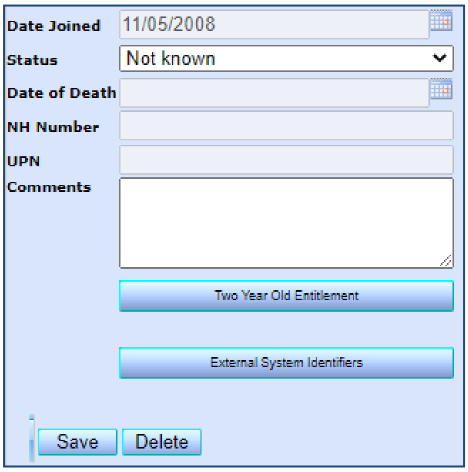


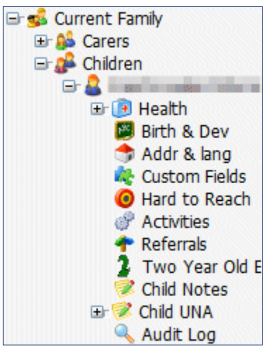
Figure 90 Delete a Child

3. Click the **Delete** button to remove the child from the system.

   A message is displayed to warn you that once deleted, a record cannot be recovered.

   All the Events that the Child had previously attended are also deleted.

Child's Record - Additional Details



The menu on the left-hand side enables you to add more information about the selected child.

Many of these options are explained in the **Family** section of this handbook.

Figure 91 Children Menu Options

Birth and Development

This area of eStart enables you to monitor the child's development process from birth. You can record their progress over time and maintain their development plans. Any details entered when adding the child are included, and can be edited (see Step 12: Add Child - Health Details on page *27* for more information).

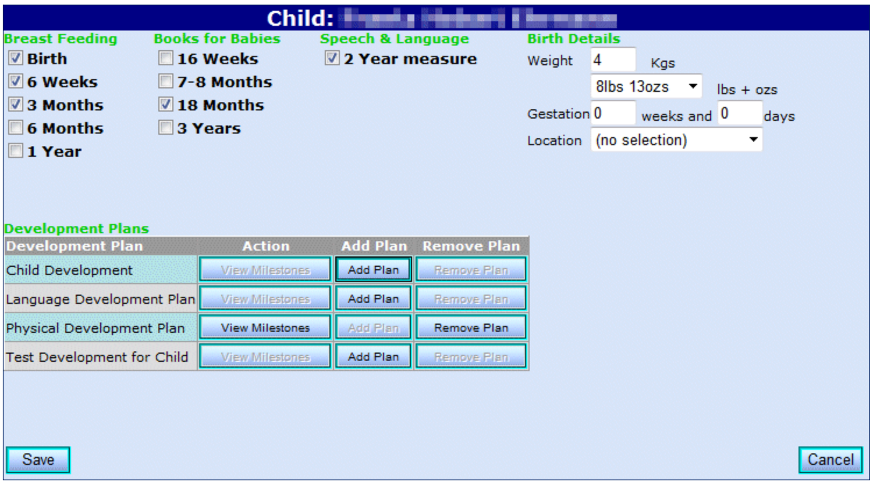


Figure 92 Child Development page

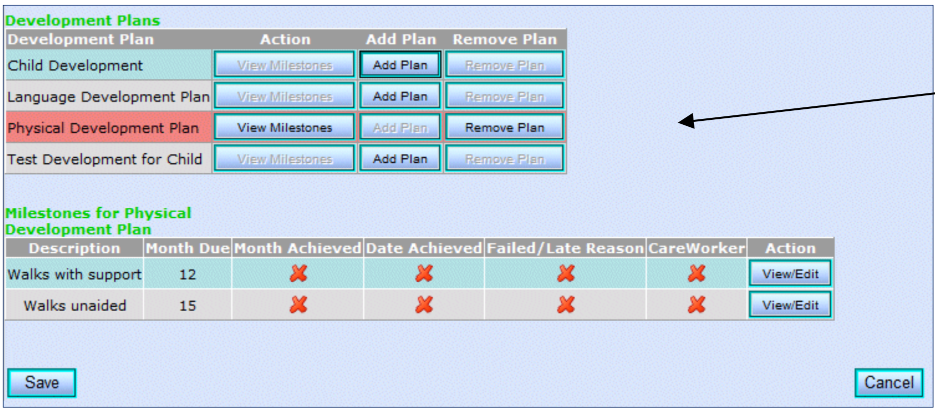
You can return to this page in the future to make any appropriate changes.

Development Plans

The **Development Plans** section of the **Birth and Development** page enables the recording of milestones passed and goals achieved.

All the plans defined for children are listed. Plans that have already been selected for this child have an inactive **Add Plan** button. Those that have not yet been selected for this child can be selected by clicking the **Add Plan** button, then the **Save** button. Click the **View Milestones** button to display a list of all the milestones or goals that make up this development plan. You can then record the child's progress against these milestones and goals.

In the example in Figure 93, milestone information has not yet been recorded for this child for the Physical Development Plan.



The currently selected plan is highlighted in red.

Figure 93 Child Development page with milestones

When the child has passed a milestone, or if they fail or are late in passing it, click the **View/Edit** button to display the **Edit Milestone** fields:

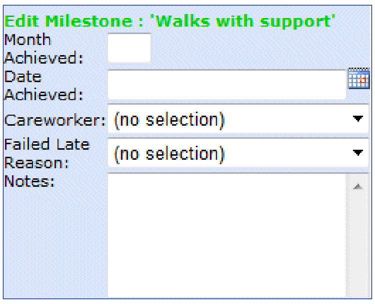


Figure 94 Child Development page – Edit Milestone

Complete all the appropriate fields, adding explanatory notes if necessary. If the milestone has been failed or was passed late, select the reason from the **Failed Late Reason** dropdown.

> ***Note***: *Administrators can add in more* ***Development Plans*** *(and their milestones) and more* ***Failed Late Reasons*** *via* ***Admin | Manage Dropdowns | Development Plans****.*

Referrals

The **Referrals** area of eStart enables you to maintain records of the referrals of carers or children to events by care workers.

It is displayed via **Current Family | Children | <Child's Name> | Referrals** or **Current Family | Carers | <Carer's Name> | Referrals**.

Figure 95 Referrals screen

A summary of the highlighted referral is displayed. To highlight a different referral, click on a referral date.

To make changes to the selected referral, click the **Edit** button. To add a new referral, click the **Add** button.

When you click the **Edit** or **Add** button, the **Referral and Case Management** screen is displayed.

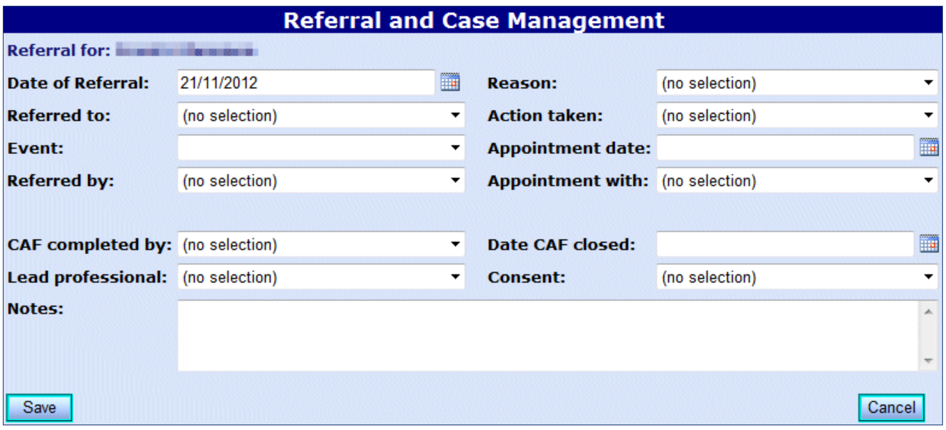


Figure 96 Referrals Case Management

Complete the fields and click the **Save** button.

> ***Note***: *The* ***Event*** *dropdown is only active once you have made a selection from the* ***Referred to*** *dropdown list. When you select a setting from the* ***Referred to*** *list, the events held by that setting are available in the* ***Event*** *dropdown.*

> ***Note***: *Administrators can add in more* ***Actions***, ***Consent Types***, ***Reasons*** *and* ***Referred To*** *descriptions via* ***Admin | Manage Dropdowns | Referrals***.

08 | Monitoring eStart Use

Monitoring eStart Use

The **Access** and **Audit Logs** within eStart allow you to see who has viewed or made changes to a specific person or family record within a selected date range, and also to see which items within a record have been changed.

By default, only console managers have access to view the logs, but they can give permission for other users to view them through the usual permissions route.

> ***Note**: In order for the logs to display the correct information it is important that the web server date and time are accurate because these are used for the date and time of the log records.*

Audit Log

The **Audit Log** tracks all changes made to a record. The carer and child audit logs display changes to the carer or child's **Basic Details**, **Health** data, **Custom Fields**, **Hard to Reach**, **Activities**, **Referrals**, and **TCP** attendance. For family records, the log also records changes made to **Service Requests**, **In Greatest Need** records and **Items**.

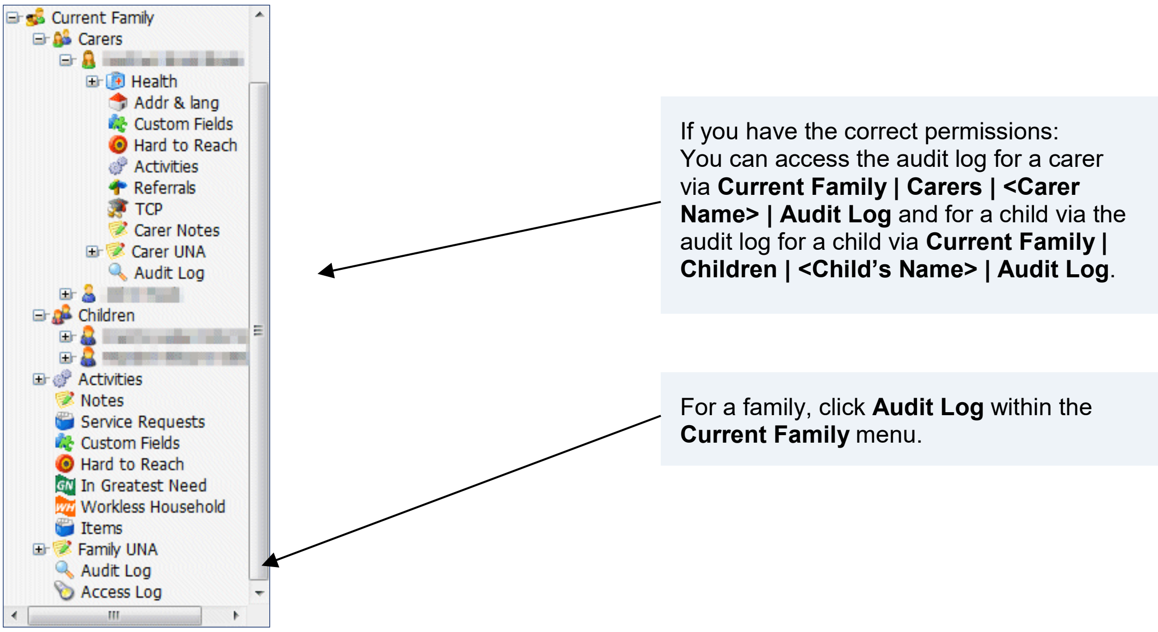


Figure 97 Audit Log menu

Click **Audit Log** to display the logged changes:

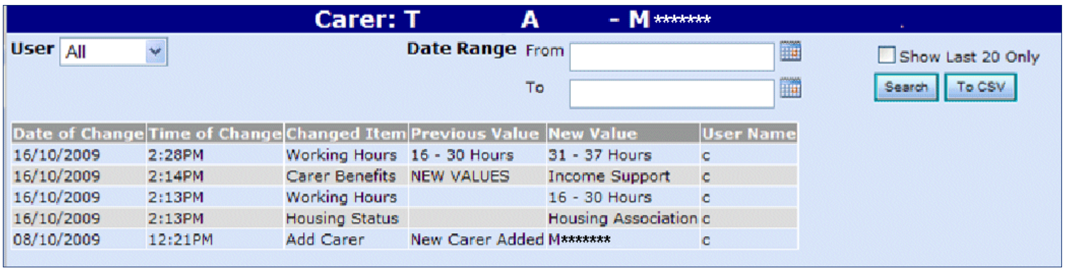


Figure 98 Audit Log (Carer)

There is a line for each piece of information that has been added or changed. For each line the following information is included:

1. The date and time of the change (based on your web server's date and time)
2. The actual item (field) that was changed
3. The previous value (if one existed)
4. The new value
5. The user name of the person who made the change

The oldest line of information is when the person was added to eStart (if this was after the implementation of the Audit Log - see warning note below).

> ***Note**: Only information that has been added or changed since the **Audit Log** functionality was implemented in eStart v3.37 is listed. No earlier information is included in the **Audit Log**.*

Values that have changed due to a merge are prefixed with **Merged**.

You can limit the results to list only those changes made within a certain date range and you can also choose to only show the last twenty records. If you choose or change either of these filter options, you then need to click the **Search** button again to display the new list of results.

The **To CSV** button enables you to download the list to Excel, then either open it or save it (e.g. as an Excel spread sheet). Give the file a suitably descriptive file name when you save it.

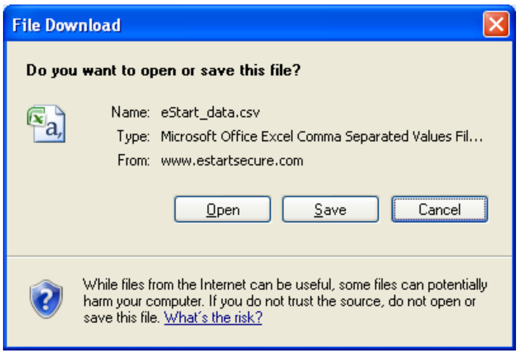
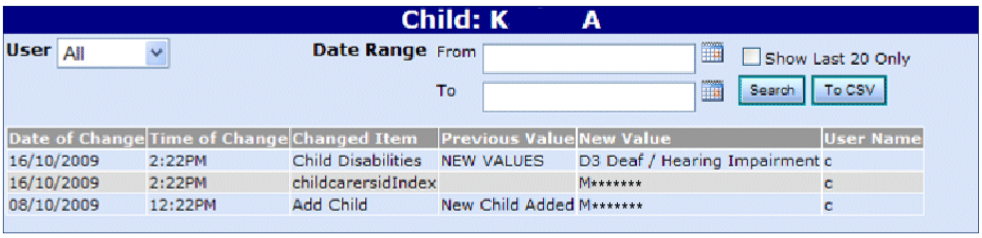


Figure 99 Export Audit Log to CSV

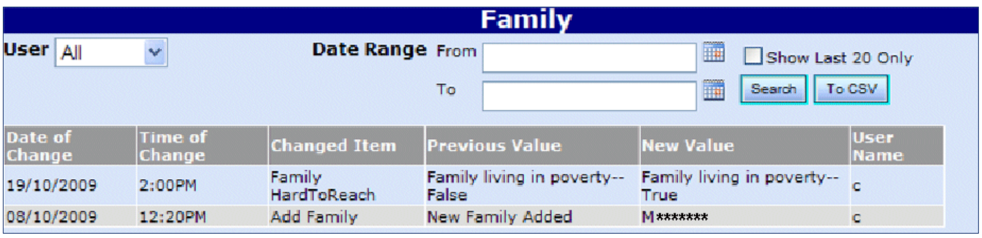
Changes are listed in the same way in the **Child** audit log:



Date of Change	Time of Change	Changed Item	Previous Value	New Value	User Name
16/10/2009	2:22PM	Child Disabilities	NEW VALUES	D3 Deaf / Hearing Impairment	c
16/10/2009	2:22PM	childcarersidIndex		M*******	c
08/10/2009	12:22PM	Add Child	New Child Added	M*******	c

Figure 100 Audit Log (Child)

And the **Family** Audit Log:

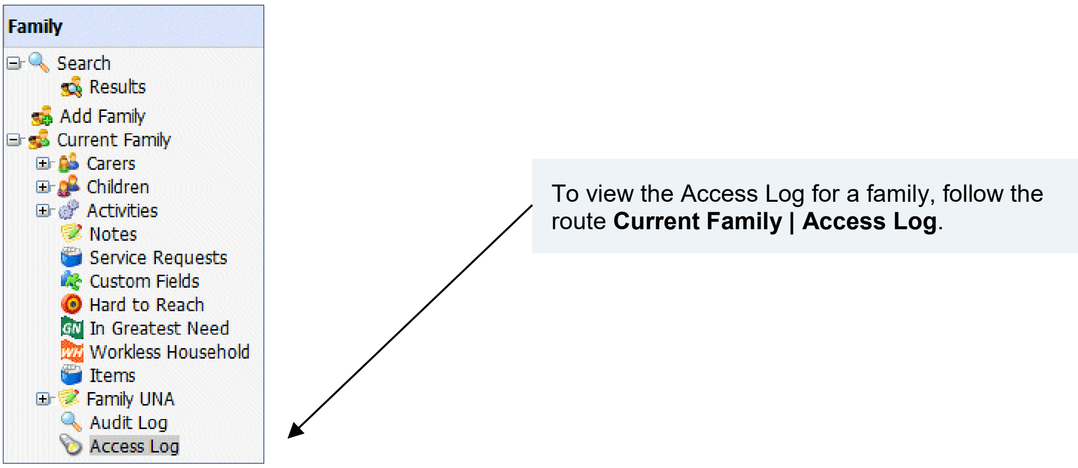


Date of Change	Time of Change	Changed Item	Previous Value	New Value	User Name
19/10/2009	2:00PM	Family HardToReach	Family living in poverty--False	Family living in poverty--True	c
08/10/2009	12:20PM	Add Family	New Family Added	M*******	c

Figure 101 Audit Log (Family)

Access Log

The **Access Log** displays a record of all attempts made to access a **Family** record (not an individual record).



When you click on **Access Log**, a screen similar to that shown below is displayed:

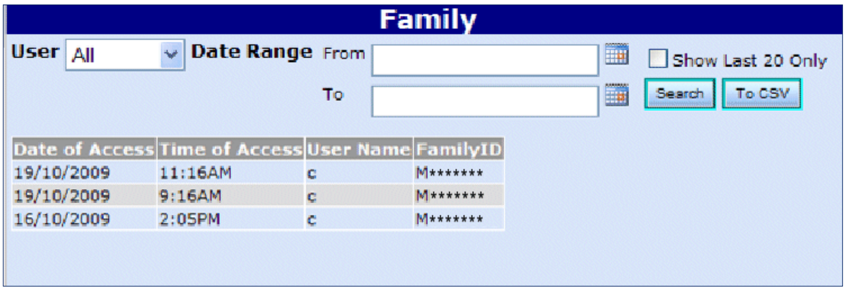


Figure 102 Access Log

There is a line of information for each access attempt. For each line the following information is included:

1. The date and time of the access (based on your web server's date and time)
2. The user name of the person who accessed the record
3. The ID of the family whose record was accessed

> ***Note***: *Only access attempts made after the **Access Log** functionality was implemented in eStart v3.37 are listed. No earlier information is included in the **Access Log**.*

You can limit the results to list only those access attempts made within a certain date range and you can also choose to only show the last twenty records. If you choose or change either of these filter options, you then need to click the **Search** button again to display the new list of results.

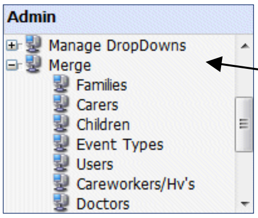
The **To CSV** button enables you to download the list to Excel and either open it or save it (e.g. as an Excel spread sheet). Make sure you give the file a suitably descriptive file name when you save it.

09 | Merging and Moving

Merging and Moving

The merge function enables you to merge families, carers, children, event types, users, care workers or doctors if there are duplicates, or to move carers and children between families.

> ***WARNING:*** *The following example describes merging child data. See* *Merging Families* *on page 75* *for the additional steps to merge entire families. You must complete these additional steps or you will delete the families from the database.*



To merge or move items, follow the menu route **Admin | Merge | [Merge Option]**.

Figure 103 Admin | Merge

Merging Data

1. Select **Admin | Merge | [Item]**. The following screen or equivalent is displayed (this example is **Admin | Merge | Children**):

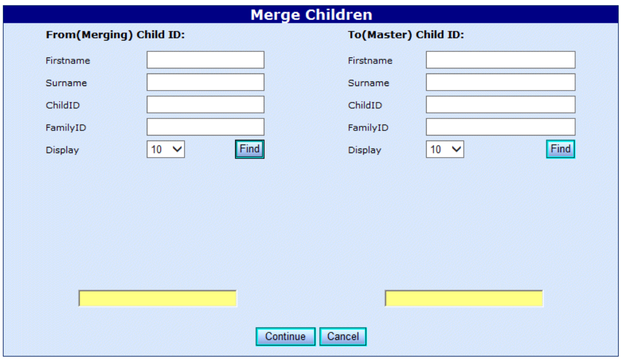


Figure 104 Merge Children screen

2. In the **From (Merging)** section, enter the search criteria for the record you wish to merge or move.
3. Click the **Find** button to display the results:

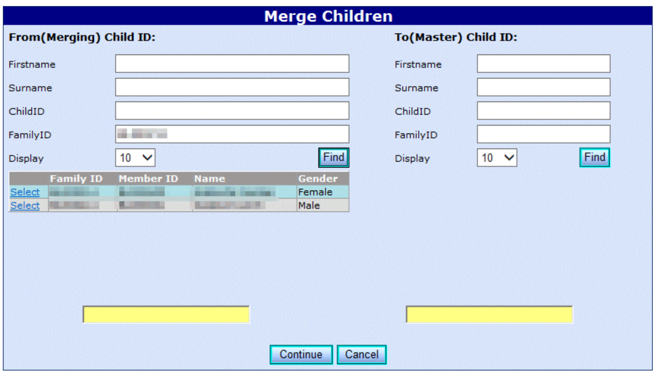


Figure 105 From (Merging) Child search results displayed

4. Click the **Select** hyperlink for the required record. The selected record's ID is displayed in the yellow field below the list:

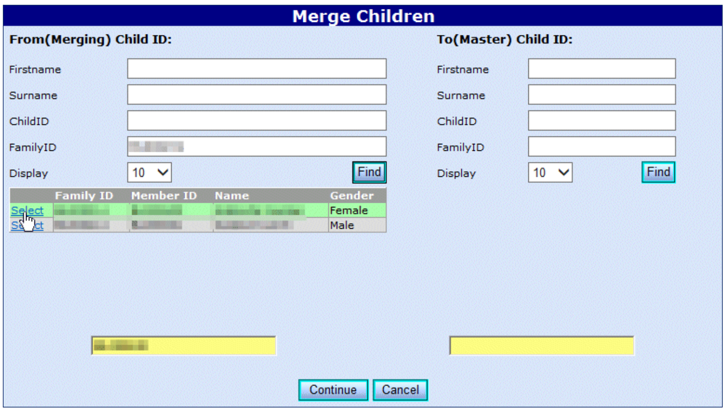


Figure 106 Selected Merging Family's ID displayed

5. Repeat steps 2 - 4 for the **To (Master) Child ID**.

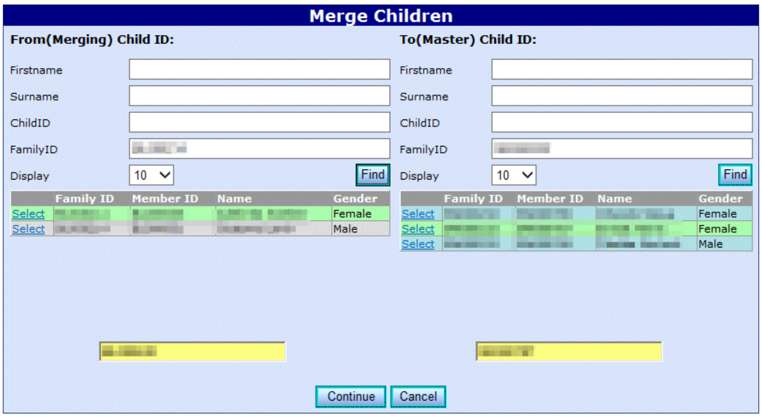


Figure 107 Merging and Master Child both selected

6. Click the **Continue** button. If the **From** child is registered to attend events, the **Merge Child Events** dialog is displayed. This dialog enables you to copy events to the **To** child. Proceed to step 7.

   If the **From** child is not registered to attend events, then skip to step 8.

NOTE: *If you are merging families or moving members from one family to another, additional steps must to be followed in order to preserve the data without creating duplicates. See* *[Merging Families](#) on page 75.*

If the **From** child is registered to attend events, the **Merge Child Events** screen is displayed, enabling you to copy the events to the **To** child. This screen is not displayed if there are no event records available to copy.

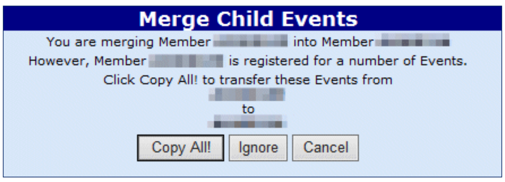


Figure 108 Merge Member – copy events

7. Click the **Copy All** button to transfer the events to the child you are merging to, or the **Ignore** button to continue without transferring the events.

If any basic data items for the selected members do not match, the **Merge Child Data** screen is displayed, listing these items.

8. Click the check boxes in the **Select** column for the items you wish to merge. Select the check box in the column header to select all the items.

   You can choose which items to merge and, in the case of dependent data, select whether any existing data is to be overwritten or added to. See [Dependency Data](#) on page *77* for an explanation of data types.

   The **Merge Child Data** screen lists any data items that are different for the two members, and also those where data is present for one member but not the other.

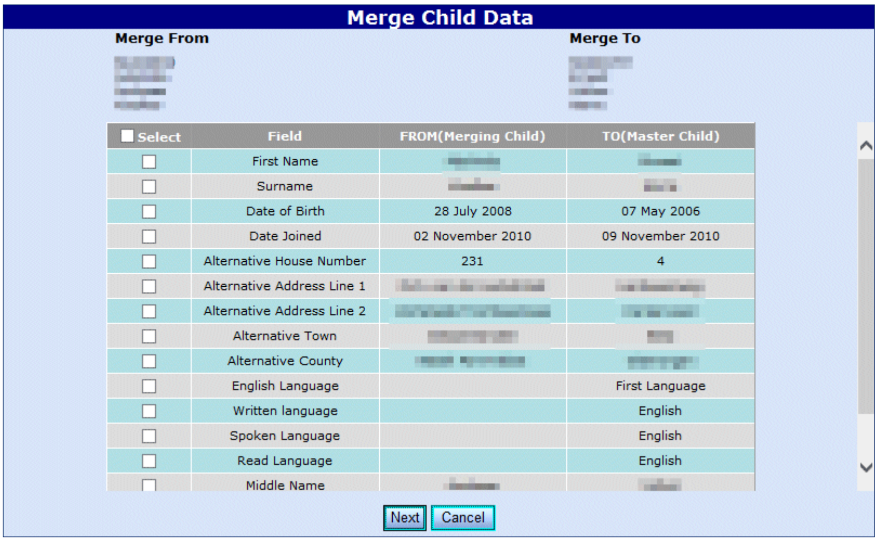


Figure 109 Merge Child Data screen

NOTE: *It is not possible to select individual address items to merge. If you choose an address item, then all the address items are automatically selected.*

9. Click the **Next** button. If any simple dependency data does not match, it is listed on the **Merge Dependencies** screen.

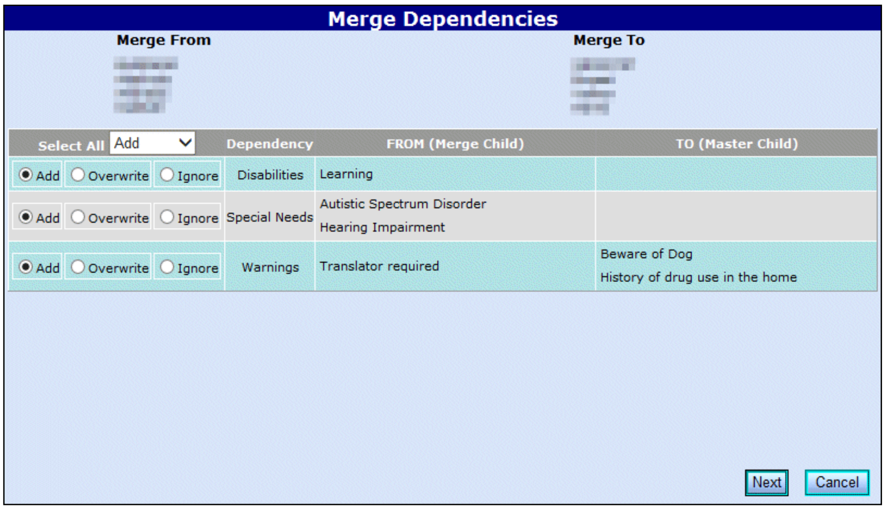


Figure 110 Merge Dependencies screen

10. Click the **Add**, **Overwrite** or **Ignore** radio buttons as appropriate:

- **Add:** The **From** data is added to the **To** data (if any exists). No data is removed.

  In the example in Figure 110, if **Add** is selected for **Warnings**, then the warnings displayed on the **Merge To** child's record after the merge are **Beware of Dog**, **History of drug use in the home** and **Translator required**.

- **Overwrite:** The **To** data is removed and is replaced by the **From** data.

  In the example in Figure 110, if **Overwrite** is selected for **Warnings**, then the warning displayed on the **Merge To** child's record after the merge is **Translator required**.

- **Ignore:** No changes are made; the data is not merged.

  In the example in Figure 110, if **Ignore** is selected for **Warnings**, then the data after the merge is **Beware of Dog** and **History of drug use in the home**.

The **Select All** drop-down sets all the radio buttons to the same action, and individual radio buttons can then be selected for finer adjustments of the merge.

11. Click the **Next** button.

- If there is no complex dependency data to merge, the **Reason for Merge** drop-down is displayed on the next page (see step 13).
- If complex dependency data is present, then the **Reason for Merge** dropdown is displayed after the list of complex dependencies on the next page.

  If there is any complex dependency data to merge, the data items are listed. For each dependency each data item (for example the dates of an **In Greatest Need** record or the name of a **Hard to Reach** criterion) is listed separately and followed by a comma, which is then followed by the value, if one exists (optional notes added by a user).

  For example, in Figure 111 the complex dependency **Hard to Reach** has two **From** criteria. The first criterion is **Family living in poverty** with the value of **Parents unable to work**, and the second is **Young Carer** with the value of **Caring for mother with MND**.

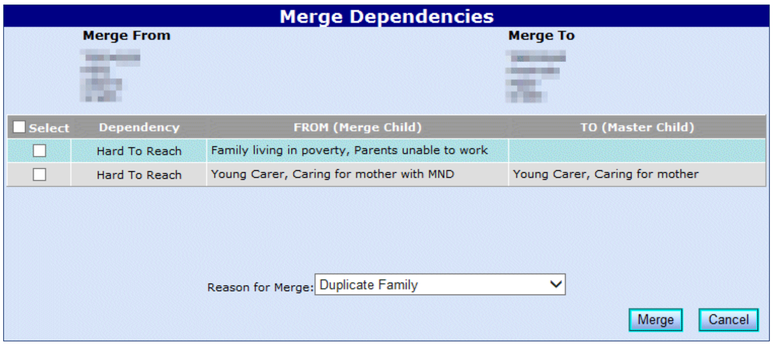


Figure 111 Merging complex dependencies

12. Select the check boxes for those data items you wish to merge (overwrite).
13. Select the **Reason for Merge** from the dropdown.

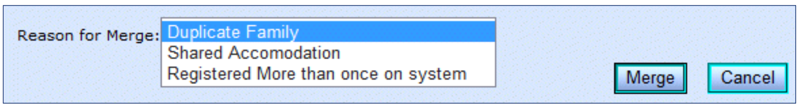


Figure 112 Selecting a reason for the Family merge

14. Click the **Merge** button.

If the merge completes successfully a confirmation message is displayed.

Figure 113 Merge successfully completed and database updated

15. Click the **Done** button.

Merging Families

When merging families, eStart guides you through additional processes to merge the carers and children from the selected families before completely merging the families. This avoids duplicates and enables all essential data to be transferred first, before the ID of the family from which the data is being moved is removed.

1. Follow steps 1-4 of [Merging Data](#) on page *71* (selecting **Admin | Merge | Families** at step 1) and click the **Continue** button.

   If the **Merge From** family has associated children and carers, the **Merge Menu** screen is displayed. This enables you to choose the type of members to be merged into, or moved to, the **Merge To** family.

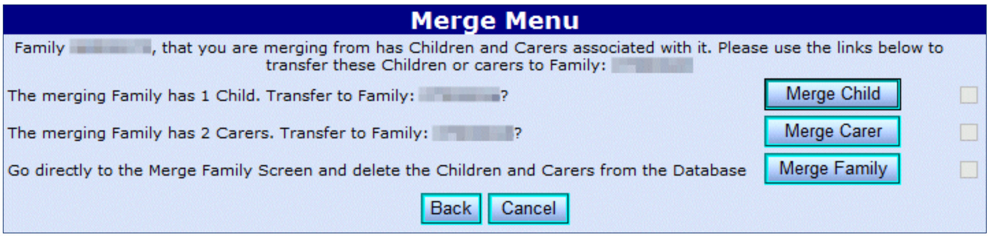


Figure 114 Merge Menu – Selecting the member type to transfer

> ***NOTE:** If the **Merge From** family has only children or only carers (not both), then the **Merge Menu** screen is not displayed. Instead, the **Merge Child** screen (if the family only has child members) or the **Merge Carer** screen (if the family only has carers) is displayed, as shown in [Figure 115](#), below.*

2. Click the **Merge Child** or **Merge Carer** button to display the **Merge Child** or **Merge Carer** screen. This lists all the carers or children from both families, displaying their name and the first line of their address.

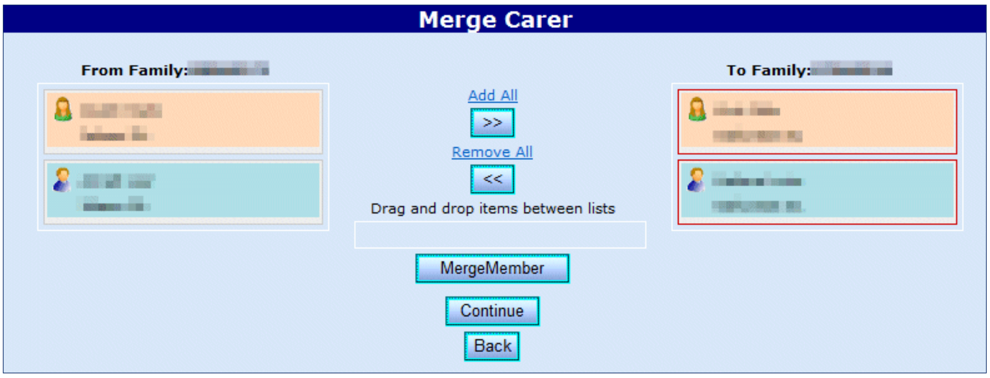


Figure 115 Merge Carer screen

3. Choose the members to merge or move.

   To move members:

- Click the **Add All** or **Remove All** hyperlinks or buttons to move all the family members to the new family ID
- Drag an individual member's name to the right-hand side to move them to the new family ID:

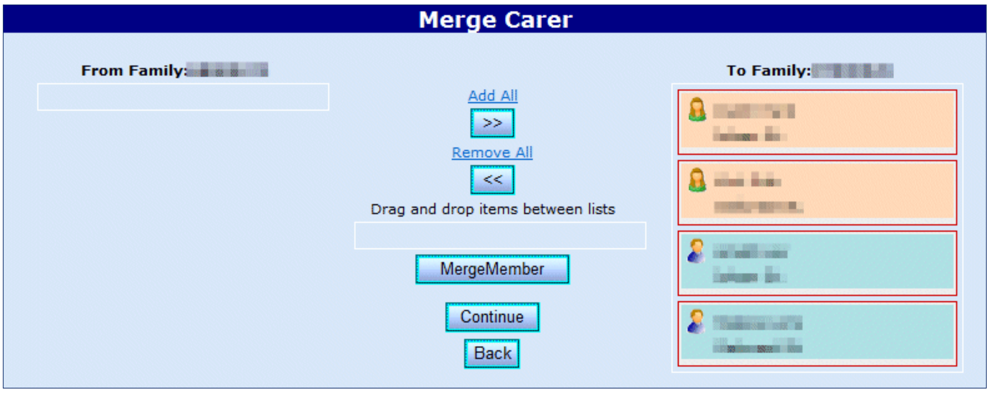


Figure 116 Merge Member – Carers moved to new family ID

To merge two family members into one record, drag individual names into the centre box:

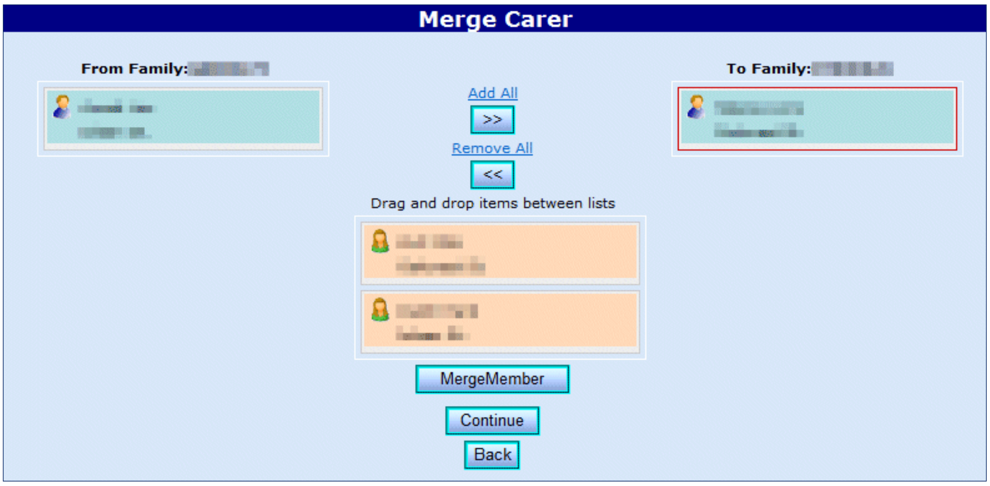


Figure 117 Merge Member – carers to be merged into one person

4. Click the **Merge Member** button (to merge two members into one) or the **Continue** button (to add a member to the new family ID).

   - If members are being moved, their data is moved to the new family and the **Merge Menu** screen is displayed again to enable you to repeat steps 2-4 above, for the other family members.
   - If two members are being merged, the merge process continues as from step 4 in *Merging Data* on page *71*.

   Repeat the **Merge Menu** processes until all the family members have been merged or moved.

5. When all the children and carers have been merged or moved as appropriate, click the **Merge Family** button on the **Merge Menu** screen. This removes the **From Family ID** and retains the **To Family ID** on eStart.

   If the merge completes successfully the following message is displayed.

6. Click the **Done** button.

Dependency Data

Data items that consists of only one entry at a time and are not dependent on other data items (e.g. **Gender**, **Surname**, **Telephone Number**), are referred to as **Basic Data**.

However, many eStart data items are dependent on other data, for example **Address History**, **Benefits**, **Custom Fields** etc. These are referred to as **Dependency Data**.

Dependency data can be simple or complex.

- Simple dependencies are those where the data consists of items selected from a dropdown list or is a series of single field entries, such as:
  - Name history (carer and child)
  - Benefits (carer)
  - Special Needs (carer and child)
  - Referrals (carer and child)
  - Notes (carer, child and family)
  - Disabilities (carer and child)
  - Affiliations (family)
  - Address history (family)
- Complex dependencies are those where the data consists of a data item (for example, the dates of an **In Greatest Need** record or the name of a **Hard to Reach** criterion) and an optional value (notes added by a user), such as:
  - Custom fields (carer, child and family)
  - Hard to reach (carer, child and family)
  - In greatest need (family)
  - Workless household (family)

10 | Events

Manage Events

The **Manage Events** section of eStart enables you to enter the details of new events, add **Attendees** (for an event in the past) or **Registrants** (for an event in the future) to an event, monitor event outcomes and record feedback from the attendees.

Click **Events** in the left-hand menu or **Manage Events** on the **Home** page.

Figure 118 Manage Events

View Event Types

When you click on **View Event Types** from the left hand menu or on **Manage Events**, all events at the children's centre are listed.

The **Event Type List** can be searched by an event **Description**, **Location**, **Provider**, **Active** status or **Setting**. The Filter dropdown enables you to further filter the results by either the initial letter of the event, or by **Favourites**.

The **TEBE** column indicates whether or not the event is part of the **Target Evidence Based Event (TEBE) Parental Programme**. TEBE events are used to measure success against the **Payment by Results (PbR)** criteria.

If an outcome has been added to the event, the **Outcome Summary** button is outlined in dark blue, as in the Baby Yoga event in the following grapic.

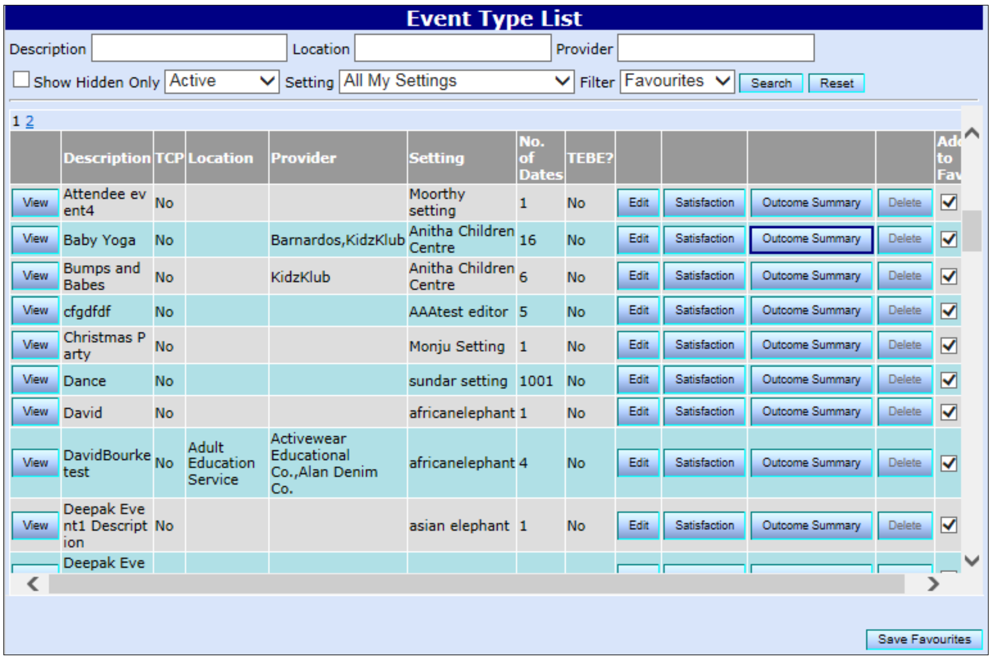


Figure 119 Event Type List

Adding Favourite Event Types

The default **Filter** option on the **Event Type List** screen is **Favourites**. Event Types are added or removed from the favourites list by selecting or deselecting the **Add to Favourites** check box on the right, and clicking the **Save Favourites** button.

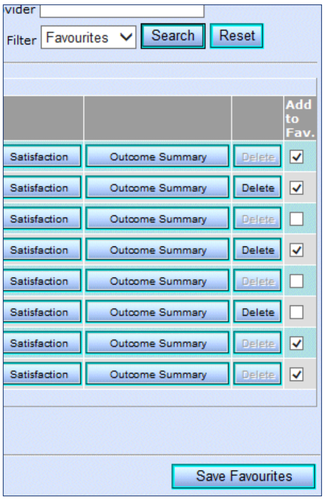


Figure 120 Adding favourite Event Types

Outcome Summary

The **Outcome Summary** displays an overall view of the event attendances and outcomes (please see [Attendees](#) on page *86* for more information about this).

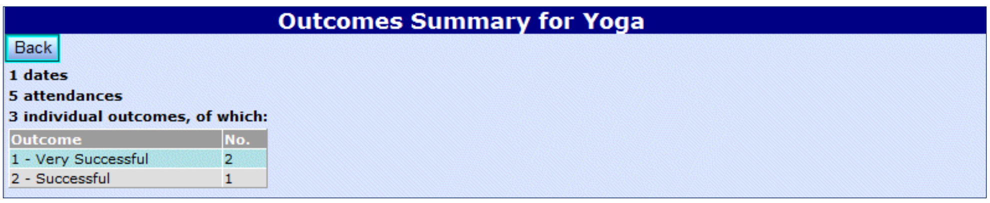


Figure 121 Outcome Summary for an Event

Satisfaction Ratings

When feedback has been received from the attendees, you can add **Satisfaction Ratings**. Satisfaction ratings apply to an event type rather than a specific occurrence of an event, i.e. a whole course rather than a single class. Click the **Satisfaction** button to open the **Satisfaction Ratings** page. Select the feedback rating from the dropdown list, select the attendees who gave this rating and click the **Apply to selected members** button.

Figure 122 Satisfaction Ratings Screen

> ***Note**: The **Satisfaction Rating** descriptions and order can be changed by an administrator via **Admin | Manage Dropdowns | Satisfaction Ratings**.*

Adding an Event Type

To create a new event type, follow the route **Events | Add Event Type**. A blank **Event Type** page is displayed.

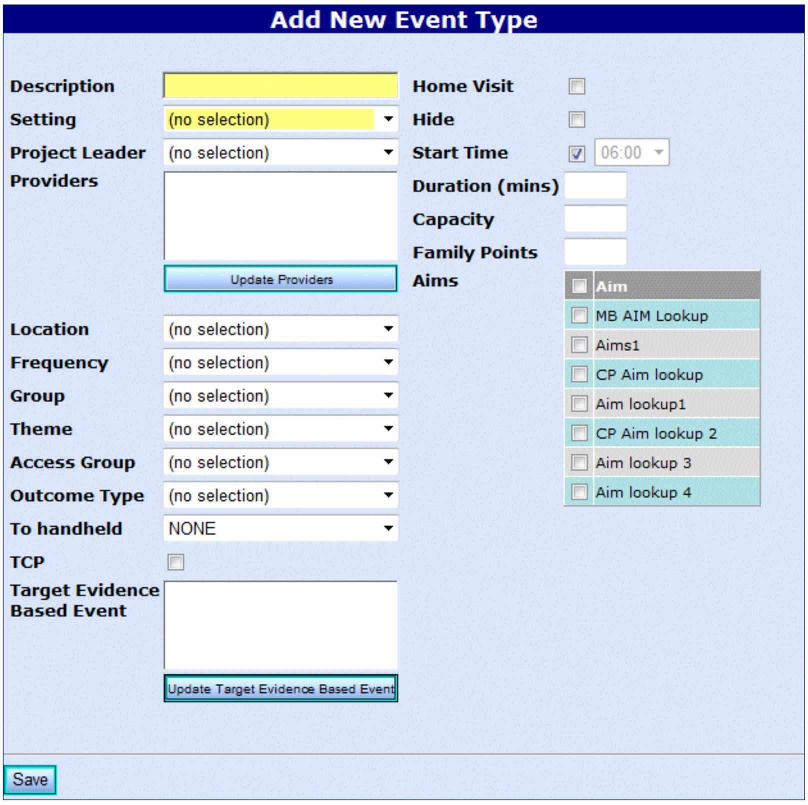


Figure 123 Add New Event Type

1. Enter the information for this event type, selecting entries from the relevant dropdown lists. The **Description** and **Setting** are mandatory, all other fields are optional.
2. Add providers. The list of providers that is available is determined by the chosen setting. To add providers:
   a. Select a setting.
   b. Click the **Update Providers** button to open a list of all the event providers for the setting you have chosen.
   c. Click the provider names to add them to the list for this event in the upper box.
   d. Click the **Update Providers** button again to close the lower box.
3. If this event type is part of the **Target Evidence Based Event (TEBE) Parental Programme**, select the relevant TEBE entries by clicking the **Update Target Evidence Based Event** button.
4. Set a default start time for the events (event dates) that are based on this event type:
   a. Deselect the **Start Time** check box
   b. Select the new time (the default is 06:00)
   c. Select the **Start Time** check box.
5. Click the **Save** button.

   You can now add dates for individual event occurrences.

> ***NOTE:*** *Administrators can add more entries to all the dropdown lists via **Admin | Manage Dropdowns | Events**.*

Adding an Event Date

When all the **Event Type** details been entered and saved, you can add the dates for the individual occurrences of the event. This enables you to add attendees and keep a register.

> ***Note**: If an event type defined as a **TCP** type is selected, then a **View Event Type | Add Course** menu option is available instead of **View Event Type | Add Date**.*

1. Select **Events | View Event Types** to display a list of available list types.
2. Click the **View** button for event type for which you need to add a date.
3. Select **View Event Types | Add Date** to display the **Add date for:** page.
4. Select the required **Date**, **Start Time**, **End Time** and **Outcome Type**.
   - The **Start Time** defaults to that set when the event type was added.
   - The **End Time** defaults to one hour after the **Start Time** but can be edited as appropriate.
5. Click the **Save** button.

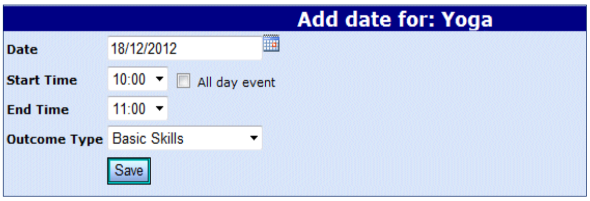


Figure 124 Adding a date for an event

You can enter a date in the future, enabling you to register members in advance (registrants).

> ***NOTE:*** *If a date is saved with the* ***All Day Event*** *check box selected and the* ***All day event*** *check box is subsequently deselected, the* ***Start Time*** *and* ***End Time*** *will reset to 00:00 and must be re-entered.*

All Events

When a date is added for an event, the following screen is displayed. This screen is also displayed when you click the **View** button for the event in the left-hand column of the table.

All Events For: Baby Yoga

Show Archived Only Results 20 FROM TO Go Red coloured rows are over capacity.

Back

1

	Date	Start Time	Duration (mins)	Outcome Type	Att								
Registrants	25/11/15	10:30	90		0 (0 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	23/04/14	07:00	360	Being Healthy	2 (2 Reg) (2 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	22/04/14	07:00	360	Being Healthy	2 (2 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	04/03/14	07:00	360	Being Healthy	0 (5 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	03/03/14	07:00	360	Being Healthy	0 (5 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	04/01/13	11:00	60	Basic Skills	0 (4 Reg) (2 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	19/12/12	10:00	60	Basic Skills	0 (6 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	18/12/12	10:00	60	Basic Skills	6 (6 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	16/12/12	17:00	60	Basic Skills	4 (4 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	04/12/12	17:00	60	Basic Skills	4 (4 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	03/12/12	17:00	60	Basic Skills	4 (4 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	03/12/12	17:00	60	Basic Skills	4 (4 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	30/11/12	17:00	60	Basic Skills	4 (4 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs
Attendees	29/11/12	17:00	60	Basic Skills	4 (4 Reg) (0 Anon)	Edit	Duplicate	Notes	Delete	Print	Outcomes	CW Durations	CW Travel Costs

Figure 125 Past Events screen

The **All Events** screen enables you to:

- Record the members (named and anonymous) and care workers who attended a past event by clicking the **Attendees** button. See Attendees on page *86.* This does not include care workers (at least one care worker must be added).
- Record the members (named and anonymous) and care workers who are expected to attend a future event by clicking the **Registrants** button (at least one care worker must be added). See *Registrants* on *page 84*.
- Make changes to the date, time or outcome type of this event by clicking the **Edit** button.
- Repeat an event that occurs frequently, rather than adding a new event each time, using the **Duplicate** button. See *Recurring Events* on *page 90* for further details.
- Add brief comments about this this event by clicking the **Notes** button.
- View the **Event Register** by clicking the **Print** button. This displays a report listing all the registrants for the event including their **Family ID**, **Name**, **Type**, **Age** (children only) and **Postcode**, and indicating whether or not they attended the event. Use the report toolbar to export, print, change page or search the results.
- The **Outcomes** button is enabled when at least one attendee is added to an event (not including care workers). Clicking this button displays the **Individual Outcomes** page and enables you to add outcomes for the attendees. See Individual Outcomes on page *86*. A summary of outcomes is displayed by clicking the **Outcome Summary** button on the **View Event Types** page. If an outcome has been associated with an attendee, the **Outcomes** button is highlighted in dark blue.
- Record a breakdown of the length of time spent by care workers at each stage of the event by clicking the **CW Durations** button.

- Record the transport details and costs of care workers attending the event by clicking the **CW Travel Costs** button.
- Filter the events and display only those held between specific dates using the **No. of Results** selector and the **From** and **To** options to.

Registrants

For events in the future:

1. Click the **Registrants** button to display a search screen with three tabs.
2. Select the **Setting** and enter the search criteria to filter the left hand list.
3. Click the **Search** button.
4. Click the arrow buttons for members in the **Search Results** list to move them into the **Registrants** list. Click the double arrow button to move all the names across.

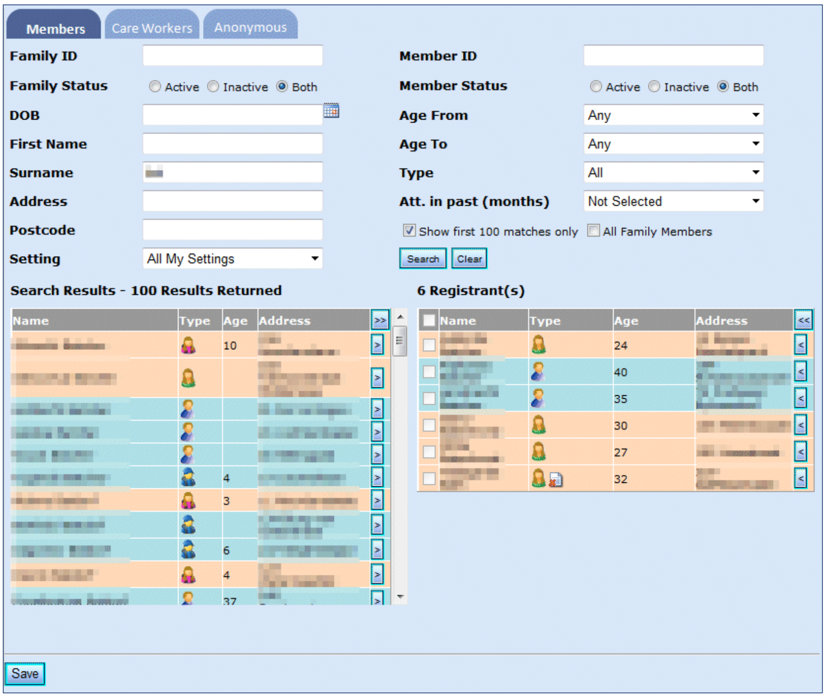


Figure 126 Search for Attendees or Registrants to add to an Event

5. Click the **Care Workers** tab to display a list of **Available Care Workers**.

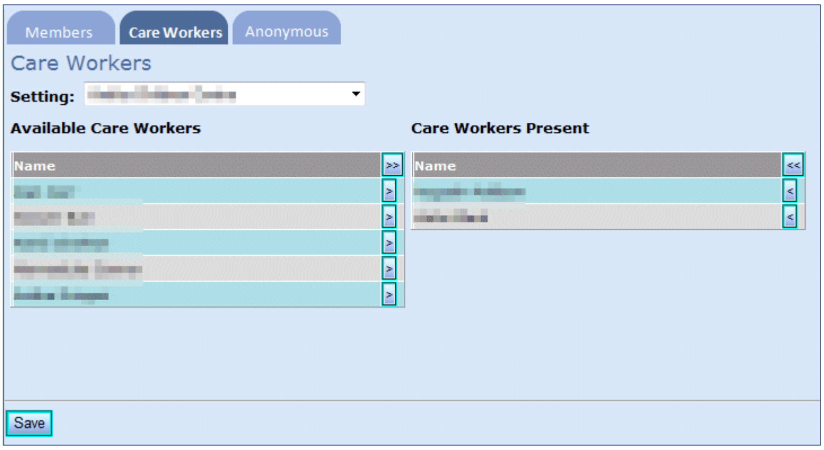


Figure 127 Search for Care Workers to add to an Event

6. Select the care workers for this event by clicking the arrow buttons. Only care workers associated with the selected setting are included in the list. Change the selected setting to generate a new list if you need to add care workers from more than one setting.
7. If necessary, add **Anonymous Members** (those who don't wish their name to be disclosed or who aren't registered at a children's centre). Enter the numbers of anonymous members for each category and click the **Save** button.

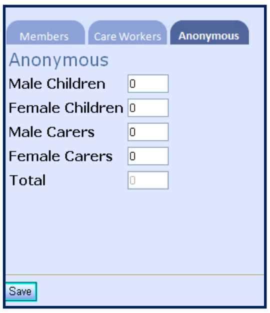


Figure 128 Adding anonymous members to an event

8. Click the **Save** button. A confirmation message is displayed.

   During the **Save** process, eStart checks that the attendees or registrants are either registered or affiliated to the event or course's setting on the date of the event (or the dates of all course meetings). If they are not, a page icon with a red cross is displayed in the **Type** column (see Figure 126).

   When an event is in the past, you can record which registrants attended the event.

Attendees

For events in the past, you can record the attendance of registrants at the event or add new attendees.

To record the attendance for an event:

1. Click the **Attendees** button to display the **Attendees** search and a list of known attendees.

   Any members who are already selected as registrants are listed on the right-hand side.
2. Select the check boxes for the registrants who attended the event.
3. If necessary, add additional attendees using the **Attendees** search. This is similar to the **Registrants** search, see Registrants on page *84*.
   a. Select the setting and enter your search criteria.
   b. Click the **Search** button.
   c. Click the arrow buttons for members in the **Search Results** list to move them into the **Registrants** list. Click the double arrow button to move all the names across.
   d. Select the names of all the confirmed attendees in the right-hand list. The numbers of registrants and attendees is updated.

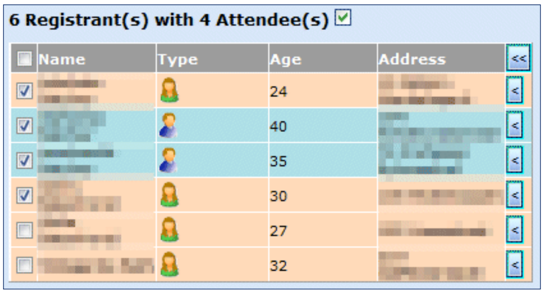


Figure 129 Marking Registrants as Attendees

4. Select any care workers and anonymous attendees from the relevant tabs.
5. Click the **Save** button.

   A confirmation message is displayed and the numbers of registrants and attendees is updated on the **Past Events** screen.

Individual Outcomes

Outcomes can be selected for each attendee at an event.

1. Click the **Outcomes** button on the event's **Past Events** page to display the **Individual Outcomes** page.
2. Select the relevant **Outcome Type** and the actual **Outcome** from the dropdown lists.
3. Select the check boxes for the attendees to whom this applies.
4. Click the **Apply to selected** button.

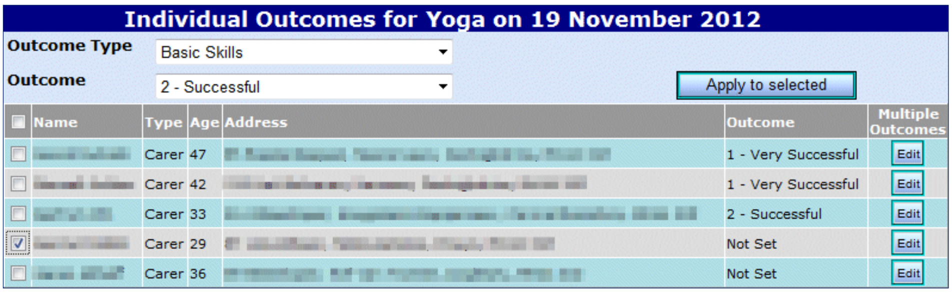


Figure 130 Outcomes Screen

If you need to remove an outcome once it has been added, or if you need to add more than one outcome, click the **Edit** button in the **Multiple Outcomes** column. This displays a screen enabling you to delete an outcome or to add additional outcomes for the attendee.

Time and Travel Breakdowns for Care Workers

Time

1. Click the **CW Durations** button to display a breakdown of the length of time spent by the care workers during each stage of the event.

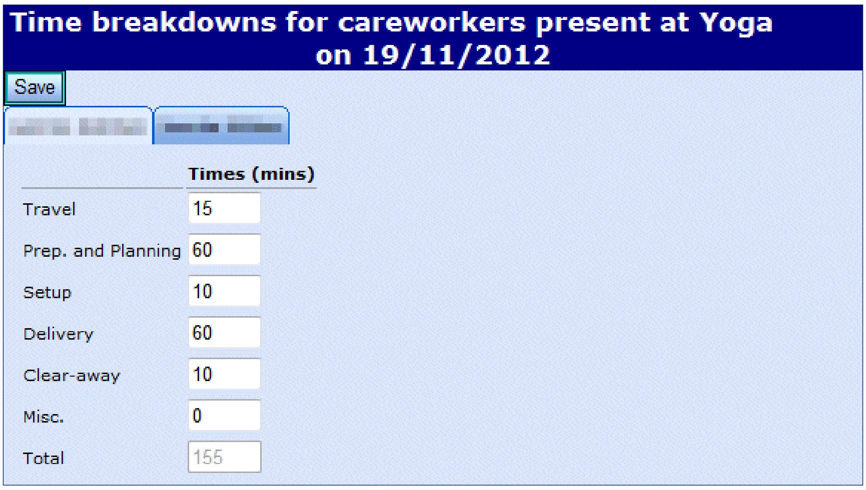


Figure 131 Care Worker Duration breakdown

2. Enter the times in minutes.
3. Click the **Save** button. The **Total** is calculated automatically.

   There is a separate **Time Breakdown** tab for each care worker.

Travel

1. Click the **CW Travel Costs** button to display travel details for the care workers associated with this event.

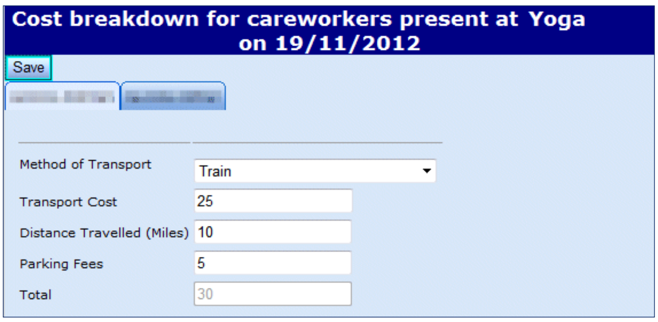


Figure 132 Care Worker Travel Cost breakdown

2. Select the method of transport that has associated costs from the dropdown list.
3. Enter the costs and distance travelled.
4. Click the **Save** button. The total of the **Transport Cost** and **Parking Fees** entries is calculated automatically.

   There is a separate **Costs Breakdown** tab for each care worker.

Events Calendar

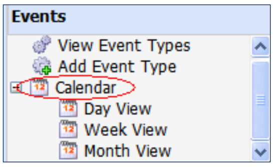


Figure 133 Events Calendar Options

The **Events Calendar** displays all events scheduled for a particular day, week or month. When the calendar is displayed, clicking the **Key** hyperlink at the top left on the screen displays a list identifying which children's centre or setting each event is scheduled to run at.

If a colour has been assigned to a setting by your eStart Administrator (via **Admin | Manage Dropdowns | Postcodes/Settings | Settings | Add** or **Edit**), this is used in the calendar as the background colour for that setting's events.

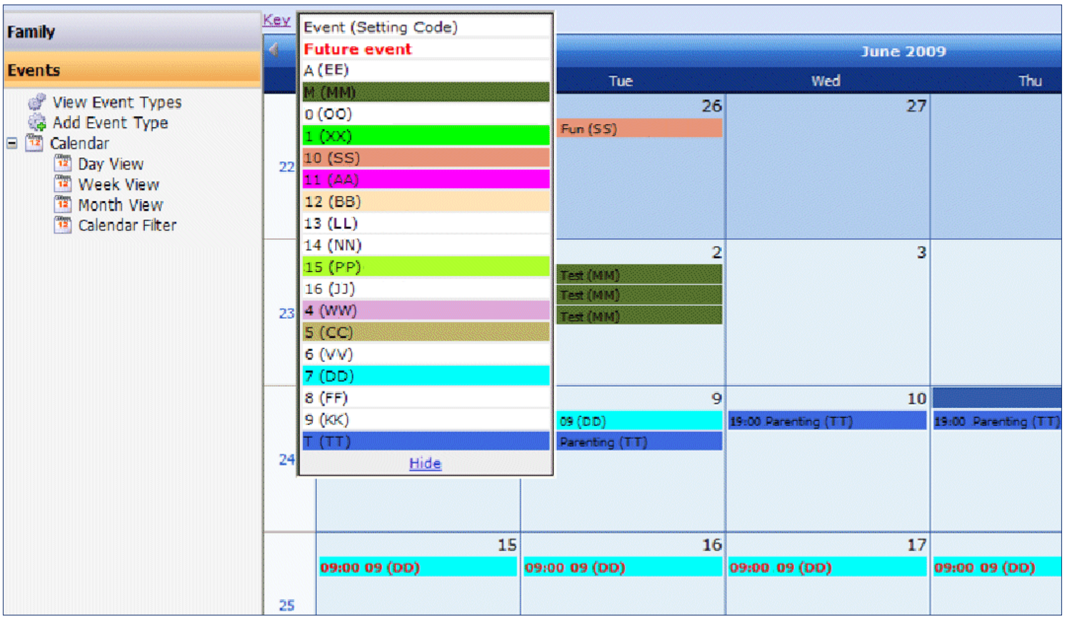


Figure 134 Events Setting Codes

Click the **Help** hyperlink to display a window describing how to make any amendments to the current display:

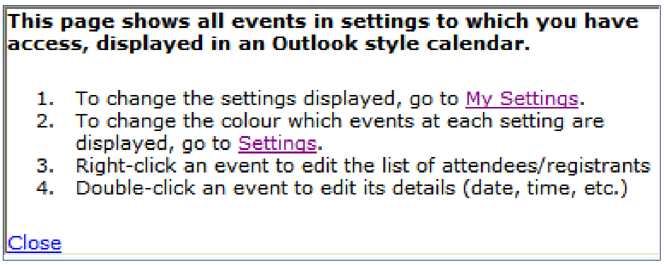


Figure 135 Help window

Day View

The day view displays all events scheduled to run on the current day. Select different days using the forward and back arrows in the upper corners, or the **Change Date** hyperlink.

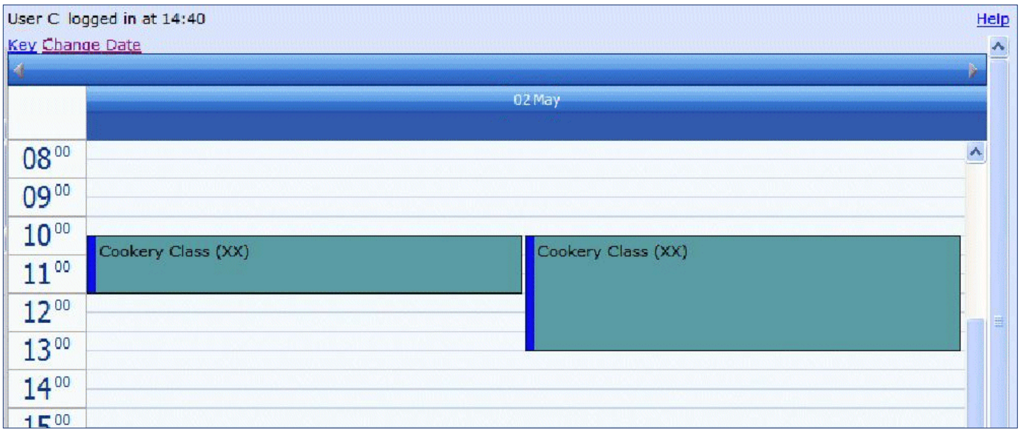
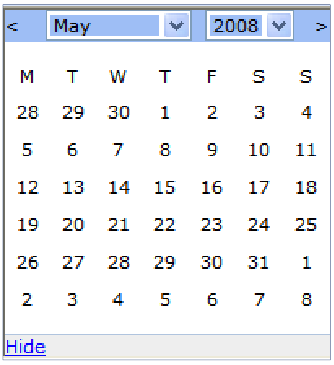


Figure 136 Events Day View



Click the **Change Date** hyperlink to display a popup calendar enabling you to choose a new date to view.

Figure 137 Change Date

Week View

The week view displays all the events scheduled to run in the current week. Use the forward and back arrow in the upper corners to move to a different week.

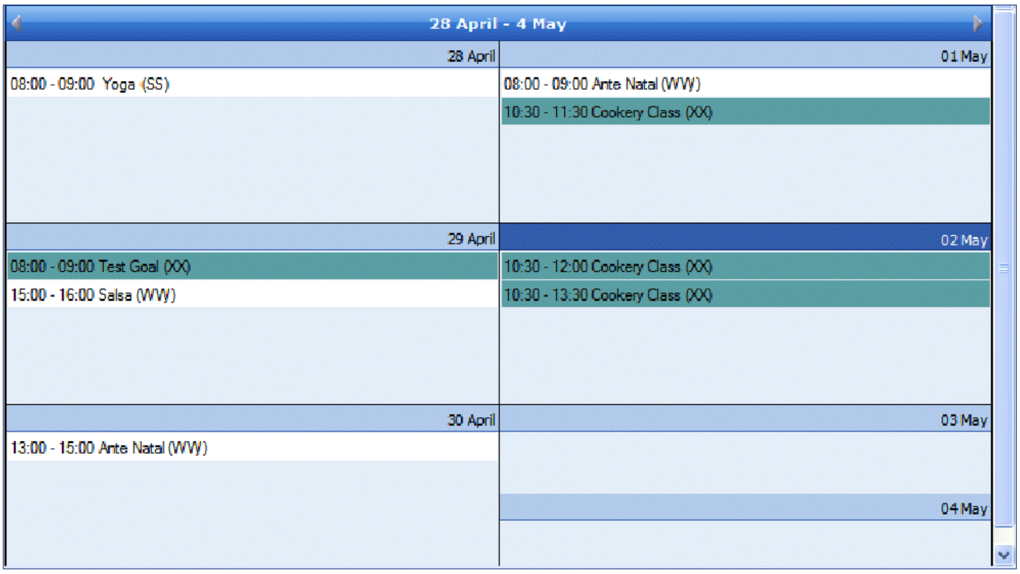


Figure 138 Events Week View

Month View

This displays all events scheduled for the children's centre during the current month. Use the forward and back arrow in the upper corners to move to a different month.

Figure 139 Events Month View

Recurring Events

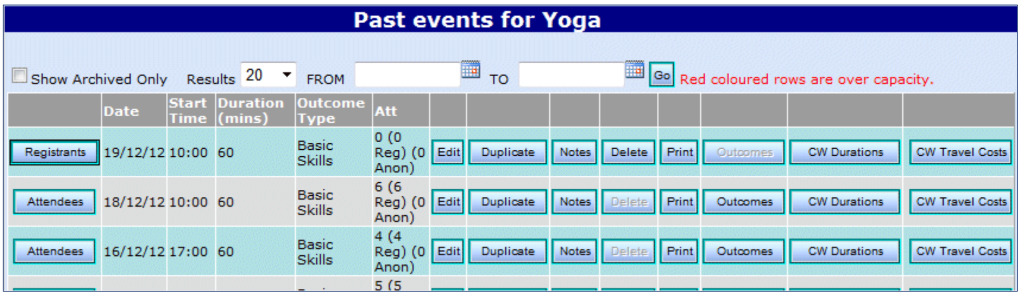


Figure 140 Past Events View screen

To create a recurring event:

1. Click the event's **Duplicate** button on the **Past Events** page.

   The **Duplicate Date** page is displayed - see *Figure 141*, below.

> ***Note**: The **Date** defaults to today's date, and the **Start Time**, **End Time** and **Outcome Type** are carried over for all the duplicate events.*

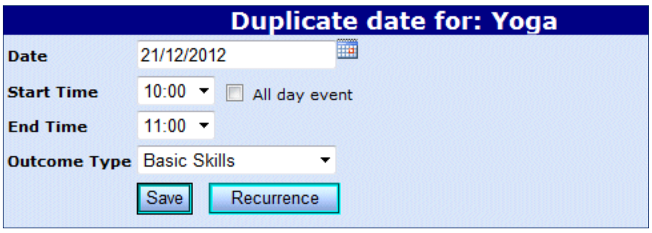


Figure 141 Duplicate events screen

2. Click the **Recurrence** button to display the **Recurrences** page:

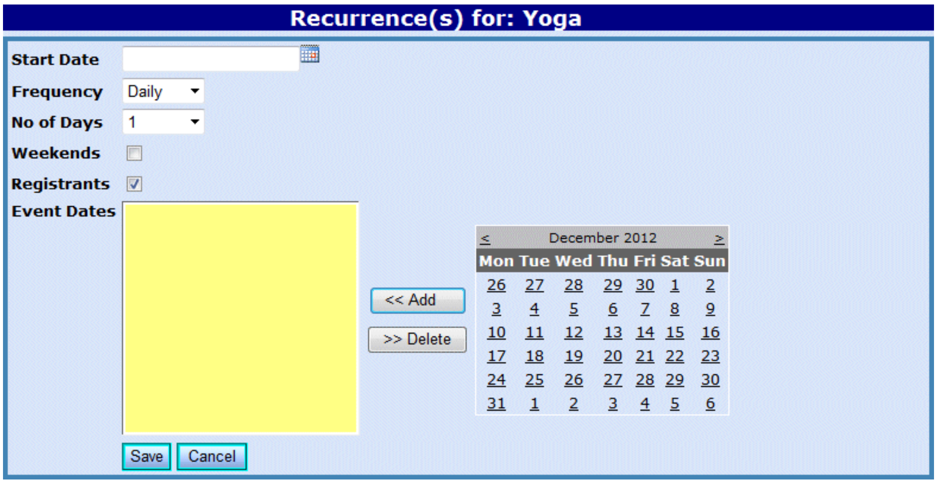


Figure 142 Recurring Events

3. Enter the date of the first event in the recurring series.
4. Select the **Frequency** from the dropdown list. Choose from **Daily**, **Weekly**, **Monthly** or **Custom**.
5. Select the **No** of **Days** (this is the number of events that will be created).
6. If you want to include weekend dates, select the **Weekends** check box.
7. To copy the list of registrants from the original event to the recurrences, select the **Registrants** check box.
8. If you have selected daily, weekly or monthly frequency, eStart generates a list of event dates, based on the **Start Date** and **number of day**s selected.

   If you have selected **Custom** frequency, click the event dates on the calendar and click the **Add** button to create the list.

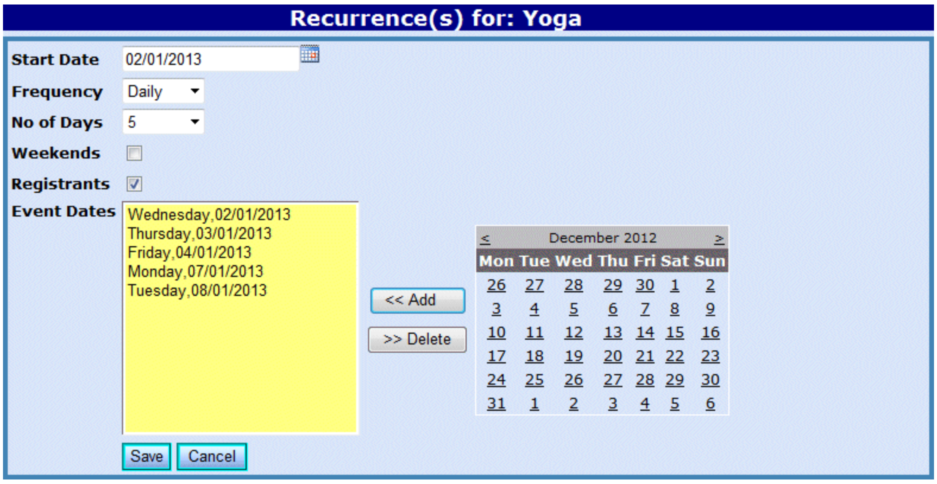


Figure 143 Recurring Event Dates

9. If required, the list can be edited once it has been created.

- Add extra dates as described in step 5.
- To remove a date, select it in the list and click the **Delete** button.

In this example, Tuesday 08/01/2013 has been removed and Wednesday, 09/01/2013 has been added, using the calendar and the **Add** and **Delete** buttons.

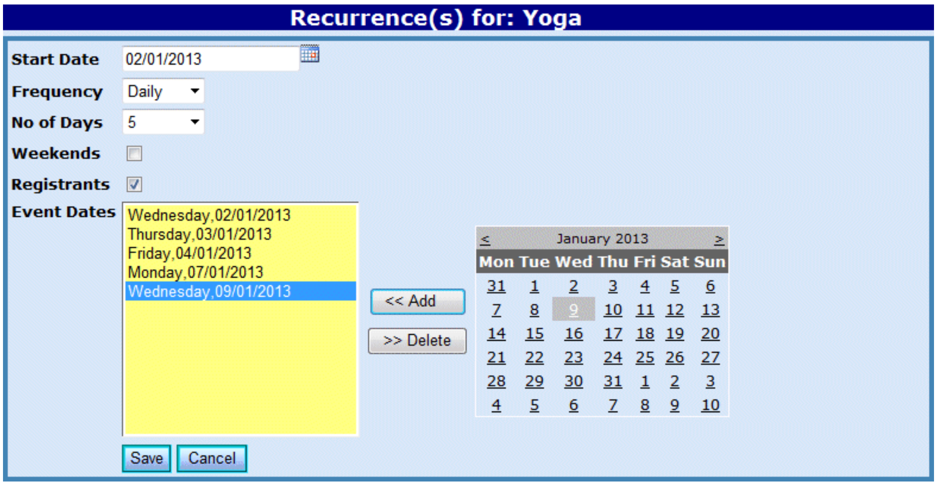


Figure 144 Adding and Deleting Recurring Event Dates

10. Click the **Save** button.

11 | Manage Lists

Manage Lists

Manage Lists enables users to conduct searches on family data and generate lists of names. These can then be used to send emails or text messages, to create mail shots etc. or can be exported, e.g. to an Excel spread sheet or XML file.

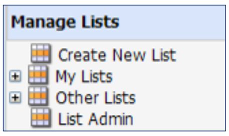


Figure 145 Manage Lists

There are two ways to send messages (emails and text messages) from eStart.

- If you wish to contact non-eStart users (for example parents) or a pre-defined list of eStart users then you need to use the **Export** function within **Manage Lists**.
- If you wish to contact eStart users (e.g. care workers), the **Messages** function enables you to create and send emails and SMS/text messages through the eStart database without creating a list first see Messages on page *107*.

The **Manage Lists** functions are described below.

My Lists

All the lists you have created are listed when you open the **My Lists** menu option. The lists marked with an asterisk (*) are dynamic lists and those without are static lists (the dynamic lists are listed below the static lists). You can make changes to your lists and save them, either as the same list or as a new list.

These can be either public or private lists.

Other Lists

The lists which do not belong to you but are available for your use (i.e. were created by another user and saved as public lists) are listed when you open the **Other Lists** menu option. If the selected list does not belong to you then you cannot save changes. The **Save** button is not available for these lists.

List Admin

The **List Admin** section allows you to manage lists that you have created and saved. Click **Manage Lists | List Admin** in the left-hand menu.

A dropdown is displayed at the top of the page. This lists all users that have saved lists on the eStart database. Selecting a user will display that person's saved lists.

These lists can now either be loaded or deleted as appropriate.

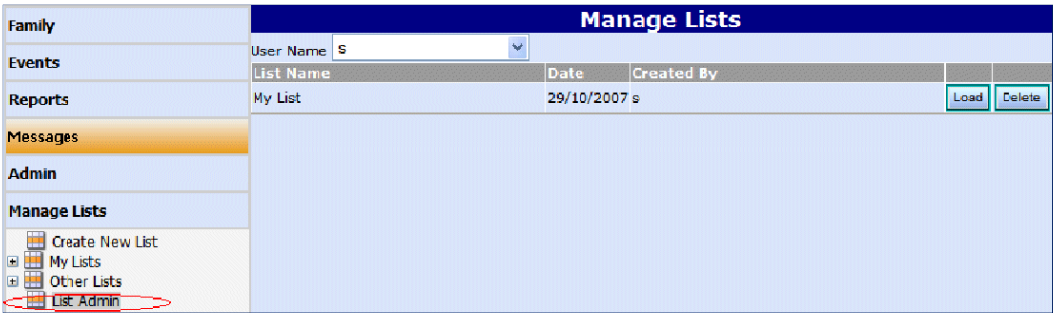


Figure 146 Manage Lists screen

Static and Dynamic Lists

Lists can either be **Static** or **Dynamic**:

- **Static lists** are those in which the list of selected names is saved but the search criteria are not saved. The list saved is that on the right hand side of the screen. Once saved, a static list must be updated manually if new records should be included.
- **Dynamic lists** (*) are those in which the list of **Matches** on the left hand side of the screen is saved, along with the search criteria. Dynamic list update with live eStart data every time the list is opened.

A dynamic list can be distinguished from a static list by (*) in front of the list name. A dynamic list can be saved as either **Public** or **Private**. The two types of list are saved slightly differently - see below.

Search Criteria

You create lists by searching for the required records in eStart and adding them to the required list. There are four tabs in the **Manage Lists** area, each containing certain search criteria.

Search Criteria tab

These are the basic person details fields such as **First Name**, **Surname**, **Address**, **Postcode**, **Family**, **Age From**, **Age To**, **Type**, **Setting** (this will default to the default setting saved in My Settings/Details), **Super Output Area** (SOA), **Member ID and Include affiliated families**.

The settings available are those to which you have access. The **SOA** dropdown list is linked to the **Setting** dropdown, so if a setting has been selected, the list of SOAs available is restricted to those that are linked to the chosen setting. If you select the SOA dropdown without having first selected a setting, then the list of SOAs available is a full list of all the SOAs for the group of settings to which you have access.

Extended Search Criteria tab

These criteria include **Family ID**, **Ethnicity**, **Member ID**, **Religion**, **Gender**, **Nationality**, **GP**, **Centre Health Visitor** and **Family Health Visitor**. By using these you can create mailing lists which target the clients of, for example, specific GPs or Health Visitors.

Carer-Specific Search Criteria tab

The search can be further extended to include carer details such as **Principle Carer**, **Correspondent**, **Pregnant** status and **Lone Parent**.

Event-Specific Search Criteria tab

Members in the list can also be searched depending on their membership of a **Setting**, **Events**, **Date Range**, **Outcome Type**, **Outcome**, **Group**, **Theme**, **Access Group**, **Provider** and **Location**.

Enter or select the criteria from which you wish to create your list and click on the **Search** button. All the people in eStart who meet the criteria are now listed in the **Matched Records** column on the left hand side of the screen.

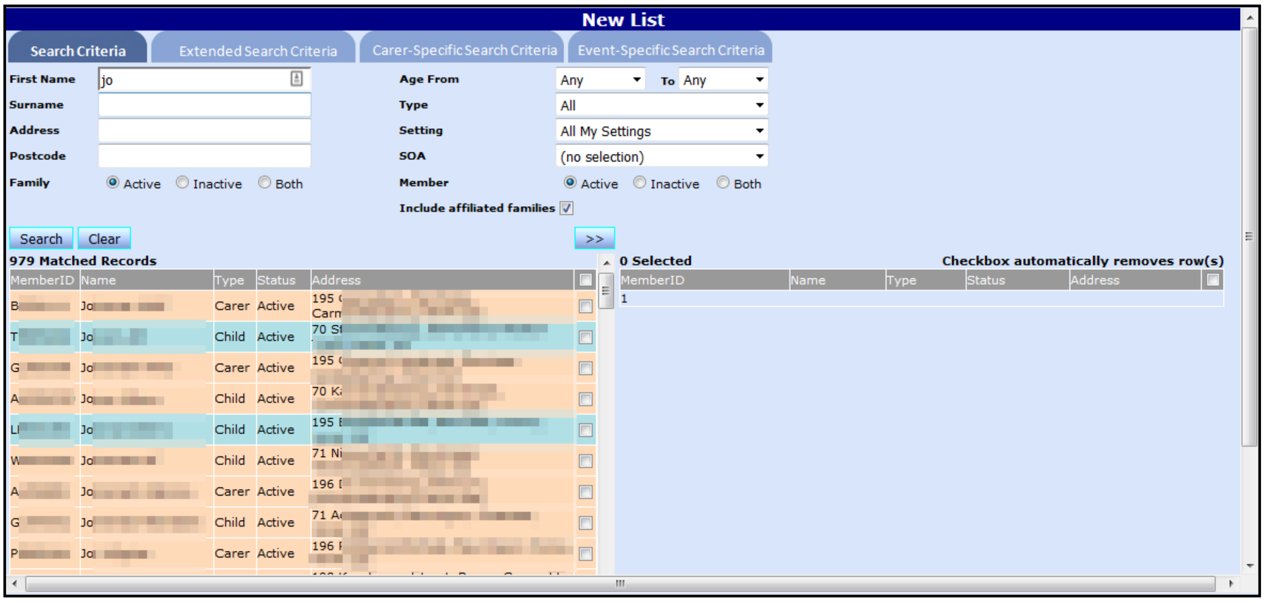


Figure 147 New List screen with Matches

Public and Private Lists

Dynamic lists can be public or private.

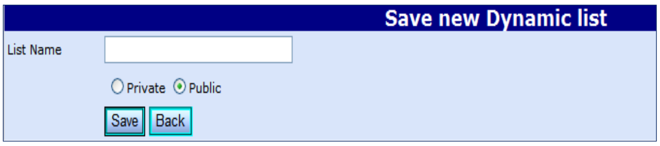


Figure 148 Public or Private dynamic list

A Public List:

- Can be viewed by all users
- Can only be changed by the user who created it

A Private List:

- Can only be viewed by the user who created it
- Can only be changed by the user who created it

Creating New Static List

To create a new static list:

1. Select **Manage Lists** | **Create New List**.to display the **New List** page.

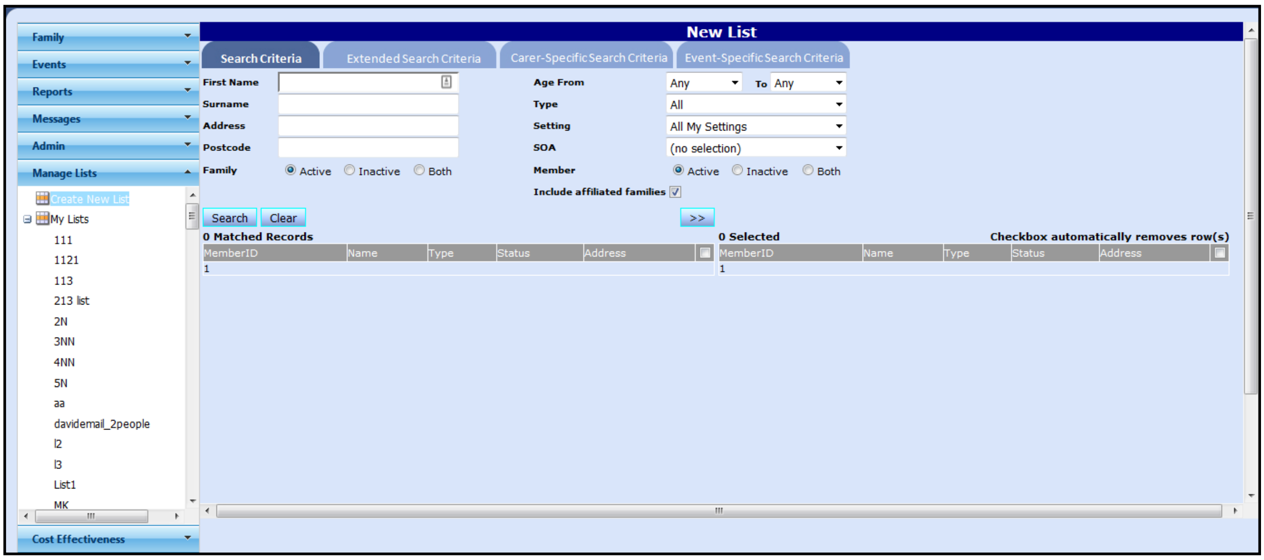


Figure 149 Create New List screen

2. Enter the criteria on which to base the list. The more criteria you use and the more details you enter into the criteria, the fewer results are generated. There are four tabs listing the search criteria, each with a **Clear** button to remove any entries you have made. The **Clear** buttons only clear the entries for the tab you are currently on.

> ***TIP***: *If you have made a lot of selections on several tabs and need to start again, the quickest way to clear all the entries and start again with a blank form is to select **Create New List** again from the left hand menu, rather than to go into each tab and click the **Clear** button on each one.*

3. Click the **Search** button to display a list of all the matching names on the left-hand side of the page.

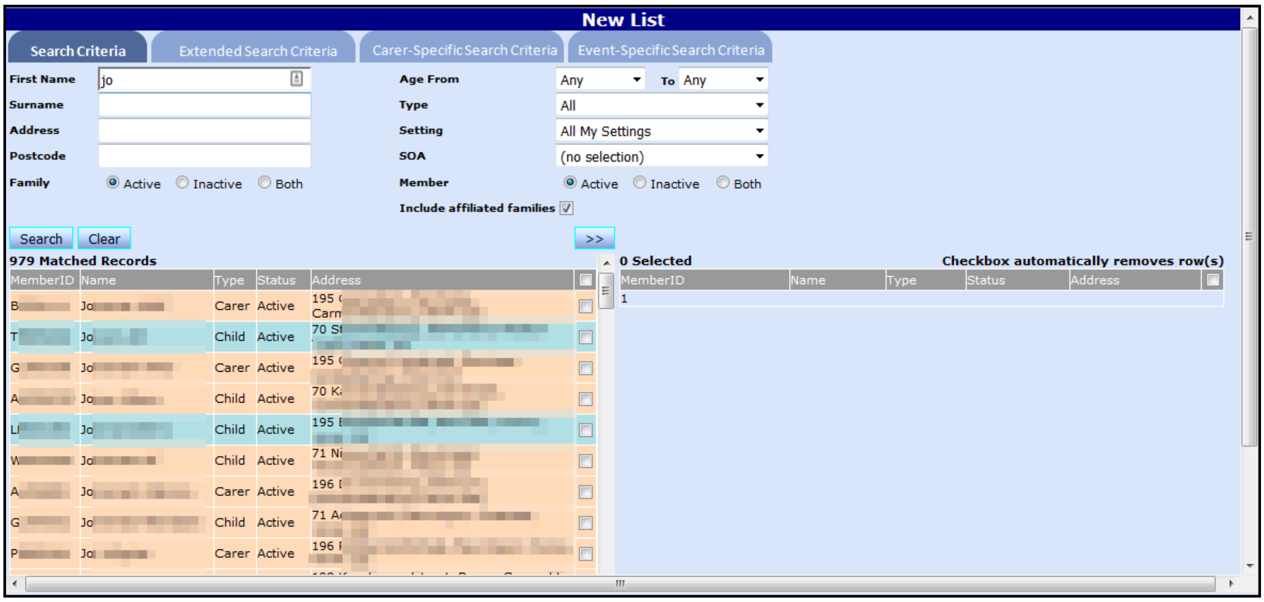


Figure 150 Create New List screen with search results

4. Select the check box adjacent to the names you want to include in the list. Alternatively, select the check box in header row to select all the matched records.

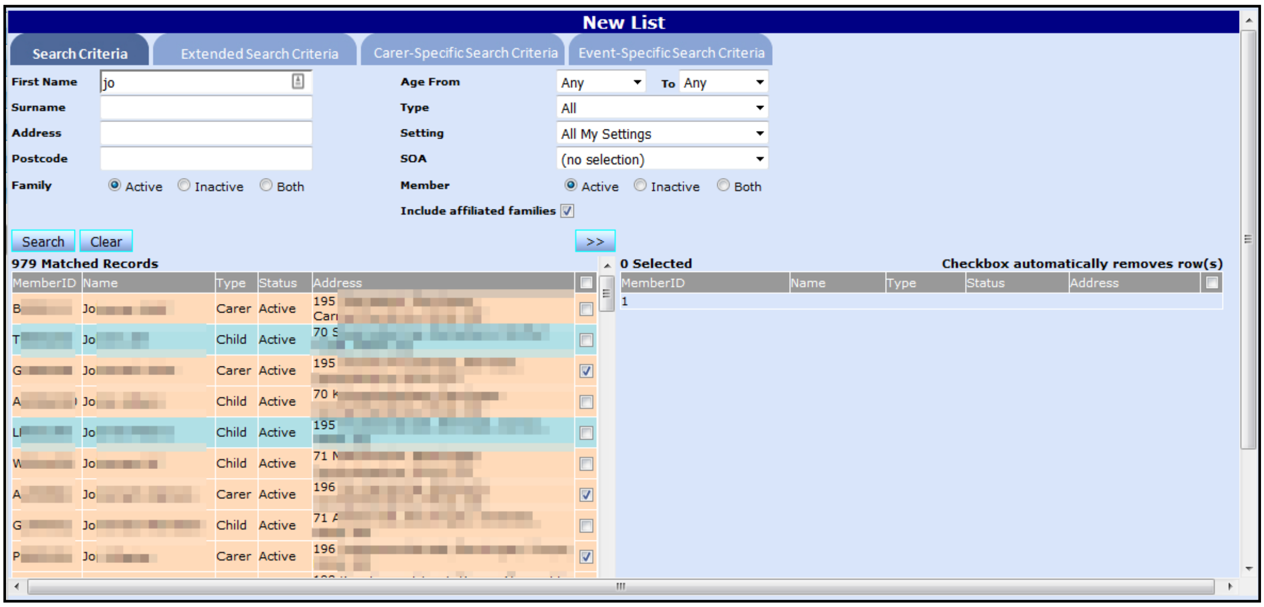


Figure 151 Create New List screen with search results selected

5. After making your selections, click the double-chevron button to add all the selected records to the list on the right-hand side.

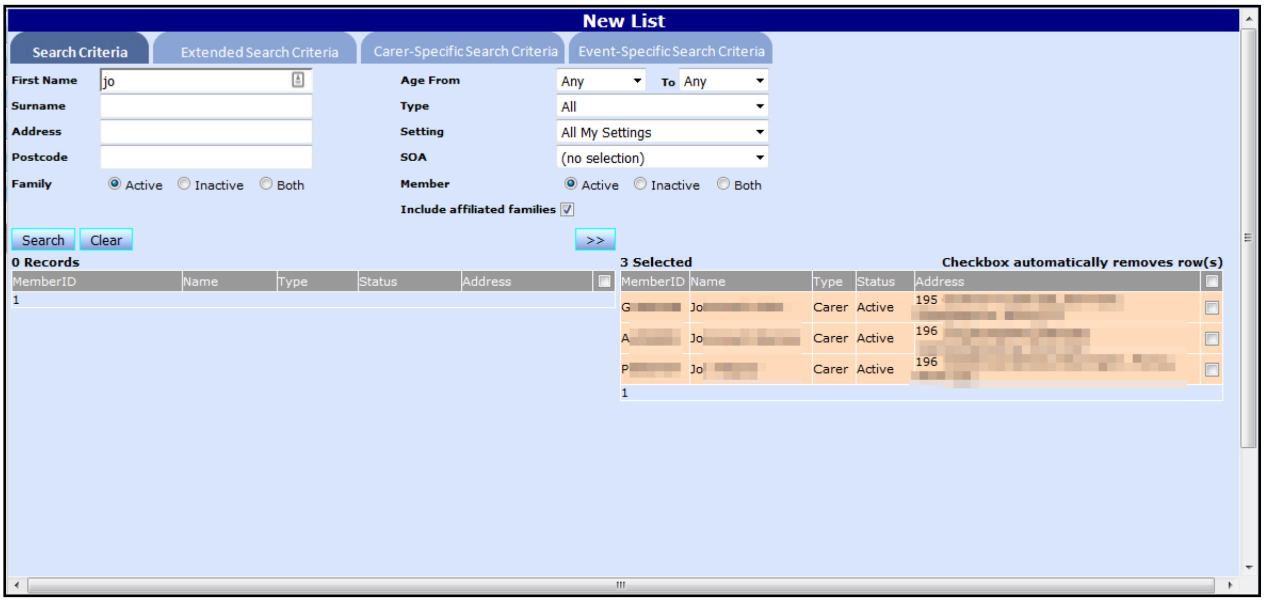


Figure 152 Create New List screen with records added to list

If you want to remove a record from the right-hand side list, select the check box adjacent to the record that is no longer required; the selected records are removed automatically.

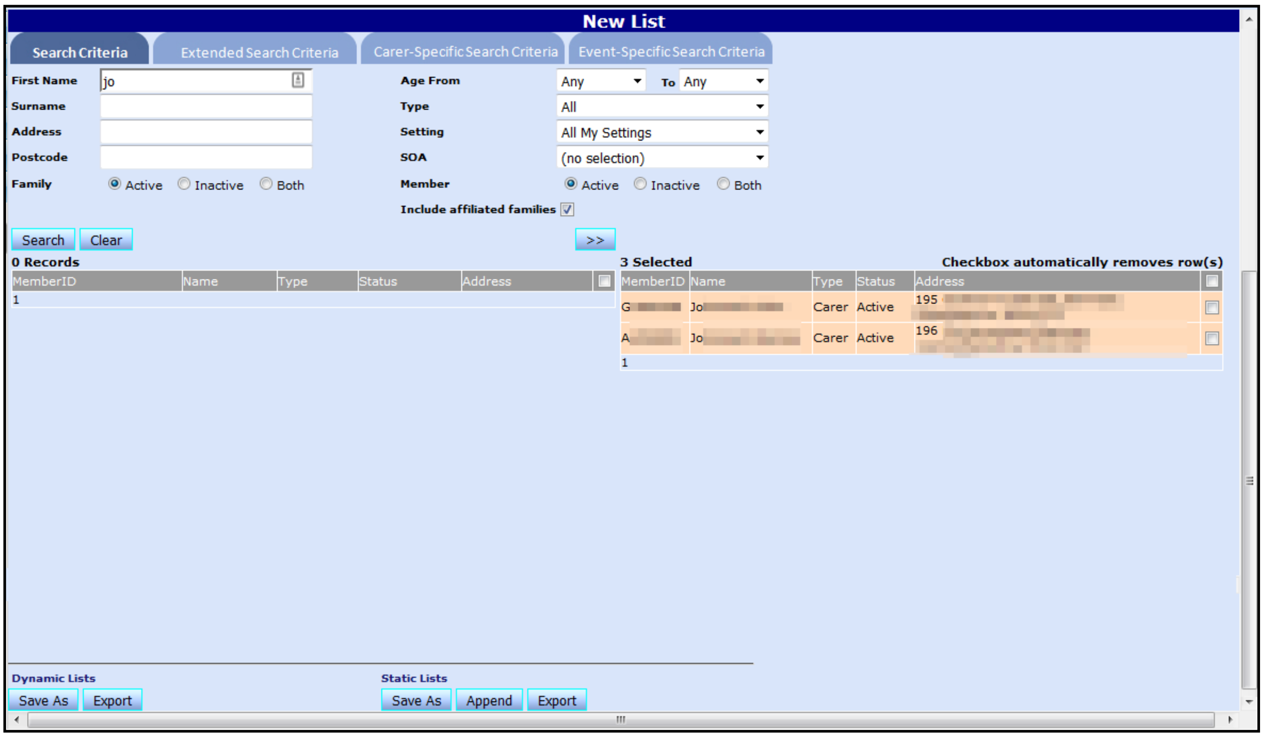


Figure 153 Create New List screen with one record removed

6. After adding all the required records to the list on the right-hand side, click the **Save As** button under the **Static Lists** heading at the bottom of the page.

Figure 154 Save new Static list page

7. Enter a **List Name** then click the **Save** button to finish making the list. Once the list is saved, you are returned to the search criteria page.

Creating New Dynamic List

To create a new dynamic list:

1. Select **Manage Lists** | **Create New List**.to display the **New List** page.

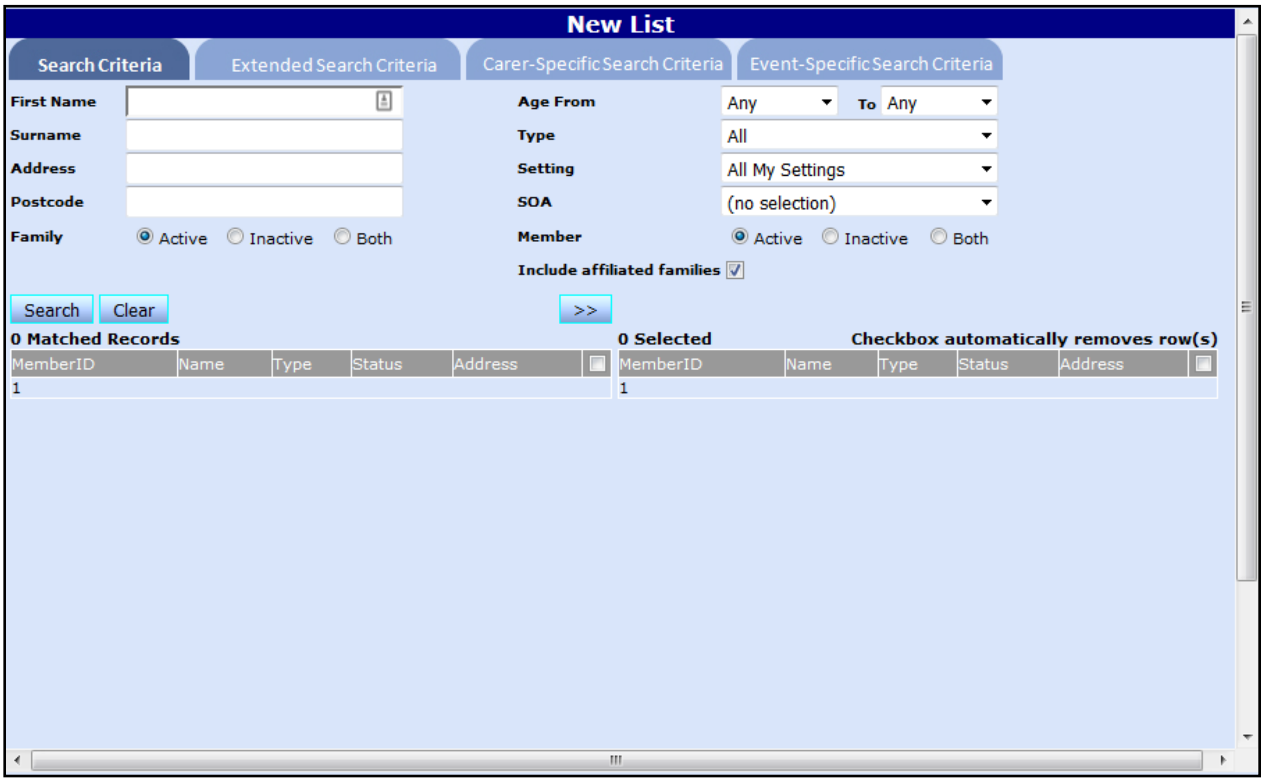


Figure 155 Create New List screen

2. Enter the criteria on which to base the list. The more criteria you use and the more details you enter into the criteria, the fewer results are generated. There are four tabs listing the search criteria, each with a **Clear** button to remove any entries you have made. The **Clear** buttons only clear the entries for the tab you are currently on.

> ***TIP***: *If you have made a lot of selections on several tabs and need to start again, the quickest way to clear all the entries and start again with a blank form is to select **Create New List** again from the left hand menu, rather than to go into each tab and click the **Clear** button on each one.*

3. Click the **Search** button to display a list of all the matching names on the left-hand side of the page.

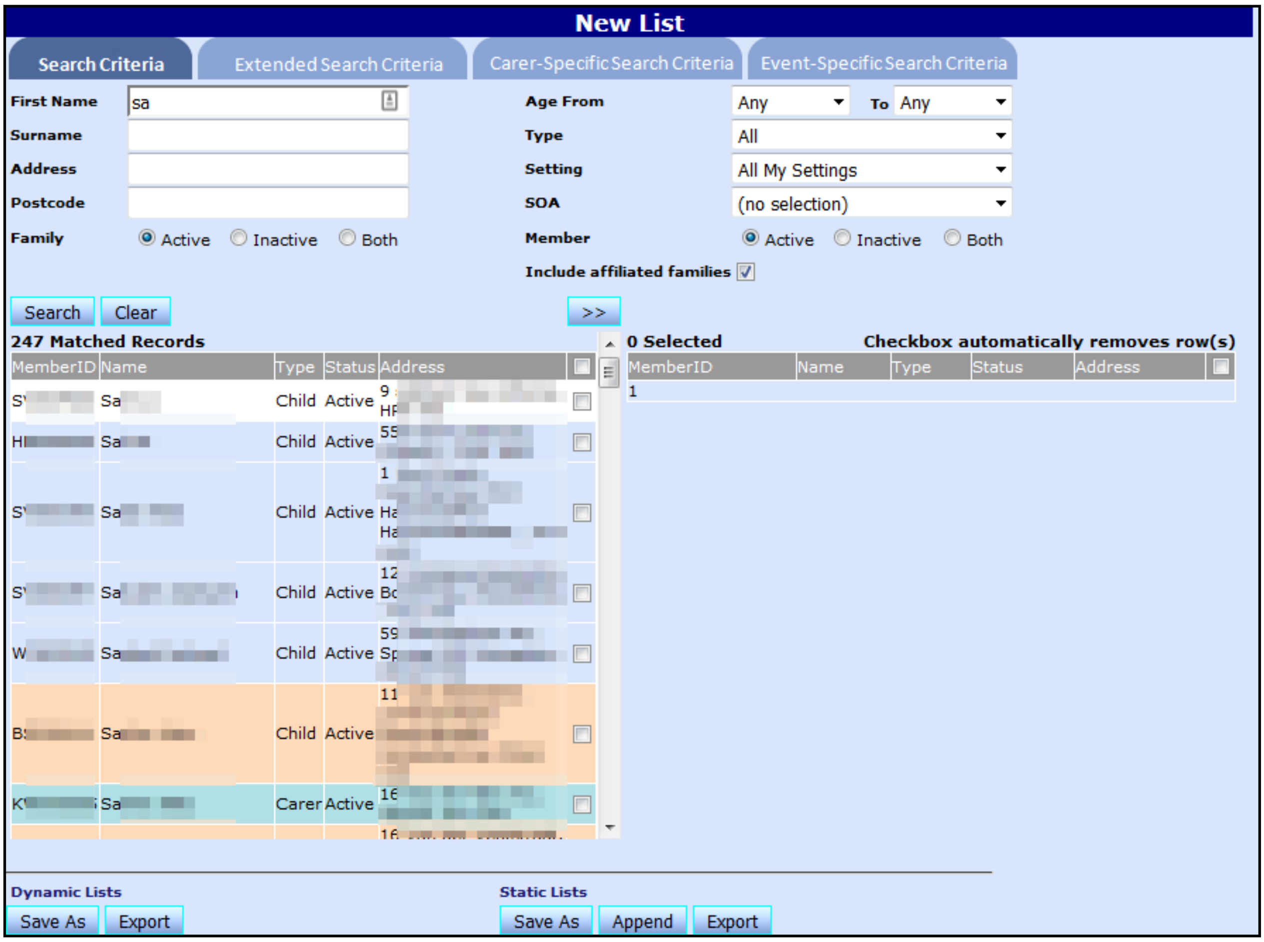


Figure 156 Create New List screen with search results

4. Review the results in the list and refine your search criteria to include additional records or to exclude currently listed records that are not required.
5. Once your list contains the required records, click the **Save As** button under the **Dynamic List** heading at the bottom of the page to display the **Save new Dynamic list** page.

Figure 157 Save new Dynamic list screen

6. Enter a **List Name** and select the **Private** or **Public** radio button as required. For more information on the private/public options, see Public and Private Lists on page *95*.
7. Click the **Save** button to finish making the list. Once the list is saved, you are returned to the search criteria page.

Editing Records in a Static List

You can manually update the records in a static list to reflect changes to your eStart data.

> ***TIP:*** *If a list is likely to need frequent updates, you should consider creating a dynamic list instead of editing a static list each time your data changes. For more information, see* *Creating New Static List on page* 95.

1. Open the static list whose records you want to edit.
2. If you need to add new records to the list:
   a. Search for the required records.
   b. Select the check boxes for the records you want to add to the existing list.
   c. Click the double-chevron button to add the records to the existing static list.
   d. Click the **Save** button.
3. If you need to remove records from the list:
   a. In the existing list on the right-hand side, select the check box for each record you want to remove. The records are removed automatically.
   b. Click the **Save** button.

Appending one List to Another

The **Append** function enables you to combine two static lists. You can use this functionality to add new records to an existing static list. Appending one list to another does not delete either list.

In the following instructions, List 1 already exists and we want to add the records in List 2 to List 1. When the procedure if finished, List 1 will contain all records from both lists, and List 2 will be unchanged.

To append one list to another:

1. Open or create the list (List 2) whose records you want to append to an existing list (List 1). For more information, see Creating New Static List on page *95*.
2. With the list containing the records to want to add (List 2) open, click the **Append** button to display the **Save List** page.

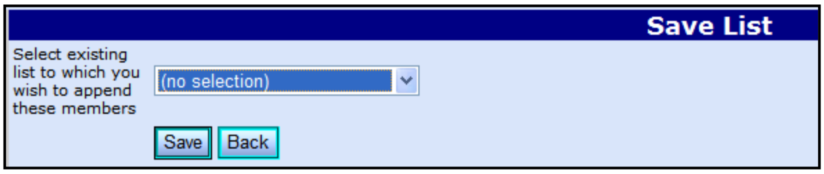


Figure 158 List for appending members.

3. Select the list to which you want to add the records (List 1) from the drop-down list.
4. Click the **Save** button when you have made your selection.

   The members from List 2 are now added to List 1.

Exporting Lists to Other Formats

Once you are happy with the list you have produced you can then save it and export it to a Microsoft application such as Excel, or create mail shots.

Click the **Export** button under **Dynamic Lists** or **Static Lists**.

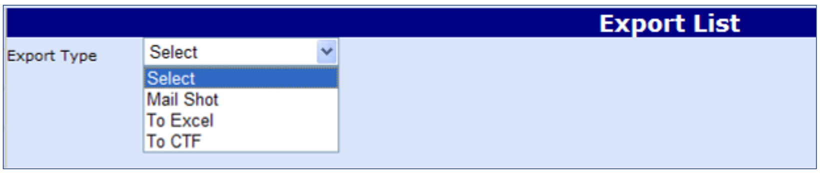


Figure 159 Export type dropdown.

Mail Shot

Select **Mail Shot**. The **Select Mail Merge Type** screen is displayed.

The **Type** dropdown allows you to choose to use the selected list for **Mailing Labels**, **Emails** and **Text Messages** and can be merged to **This (selected) List**, **Main Carer** or **Main Correspondent**.

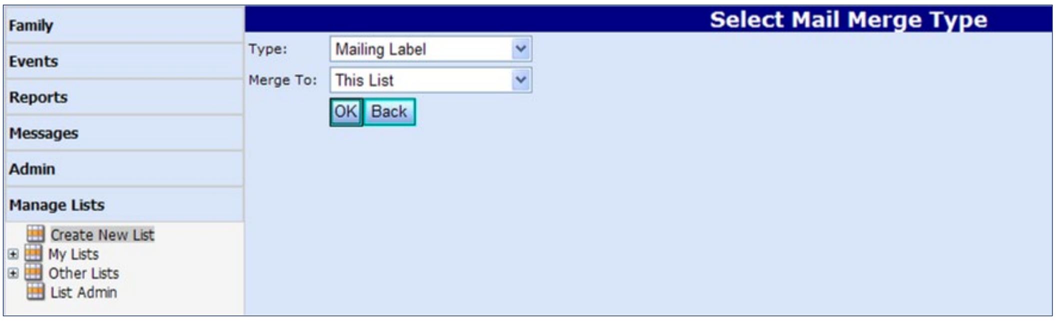


Figure 160 Mail Merge Type Screen

Main carers and correspondents are not necessarily the same. A main carer must be selected as a **Primary Carer** on a child's record and a correspondent must have the **Send Correspondence** check box selected on their record.

Mailing Label

1. From the **Type** drop-down menu select **Mailing Label**.
2. From the **Manage To** drop-down menu select **This List**.
3. Click the **OK** button.

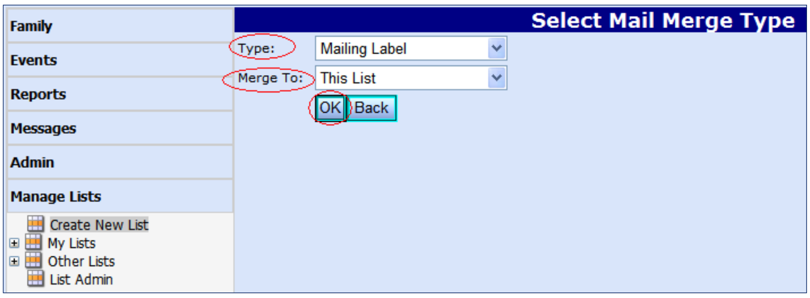


Figure 161 Selecting Mailing Label

4. Choose a label type. You can select one of two sizes, L7163 or L7160.
5. Click the **OK** button.
6. You now have the option to **Open** or **Save**. Clicking the **Open** button enables you to view the mail shot. Click the **Save** button to save it to a file.

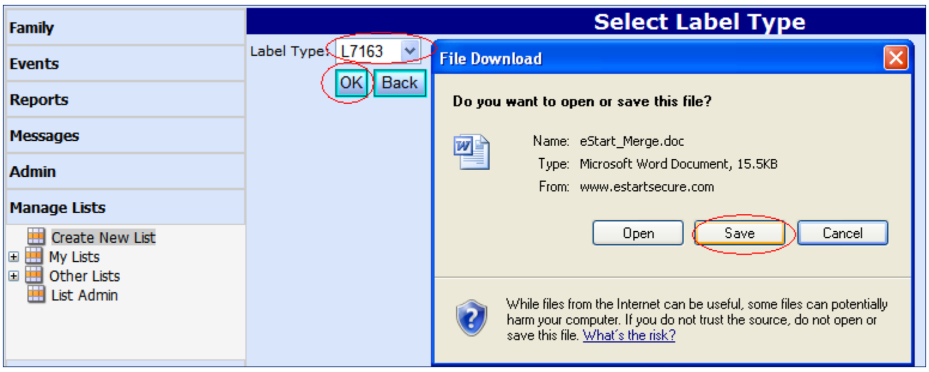


Figure 162 File Download dialog

Email

Enter the subject and message, and click the **Send** button.

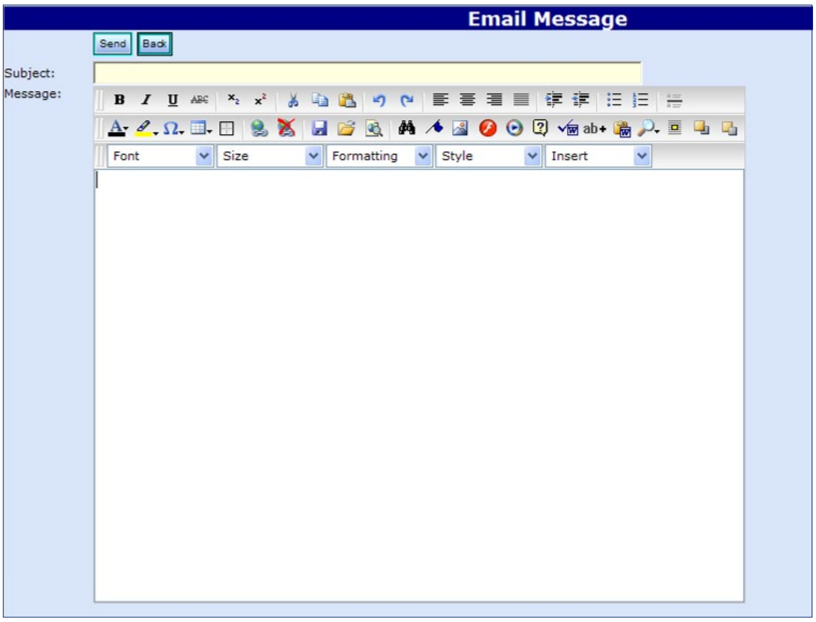


Figure 163 Creating an Email Mail Shot

You can edit the font size and colour and can insert media files and pictures. These features and others can be found on the toolbars above the message box.

Text Message

Enter the message and click the **Send** button.

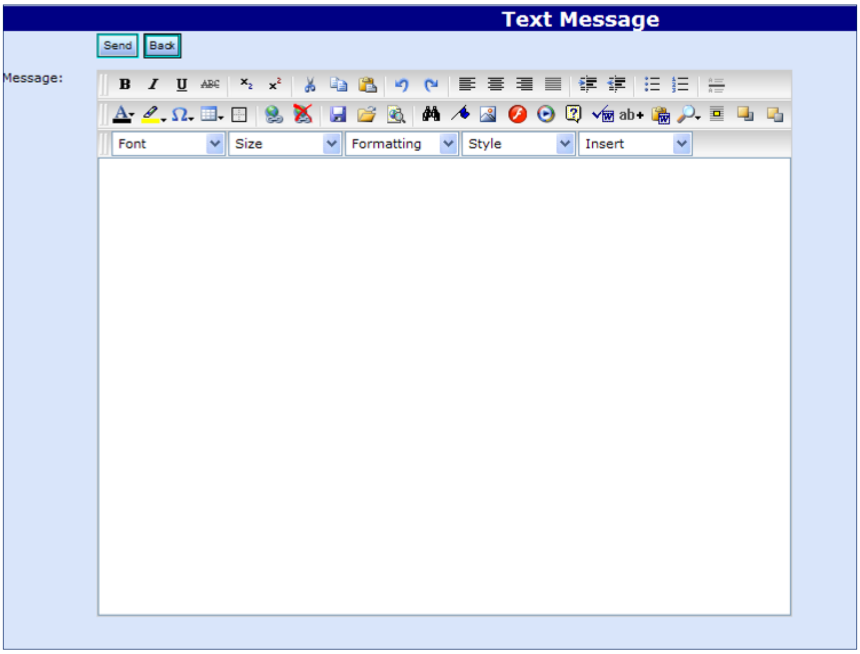


Figure 164 Creating a Text Message Mail Shot

You can edit your message before you send it, by using the toolbars. You must ensure that your chosen recipients have valid mobile phone numbers set-up against their details.

To Excel

This function allows you to export data from the lists you create to Microsoft Excel.

1. Click the **To Excel** button.
2. Select the fields for export. You can choose to export as many headers (field names) as you like from the list. Click on a single field name to select it for export. More than one field can be selected using ctrl + left mouse click or by clicking **All** to select all the fields. Click the **Toggle** button to select or deselect the fields.

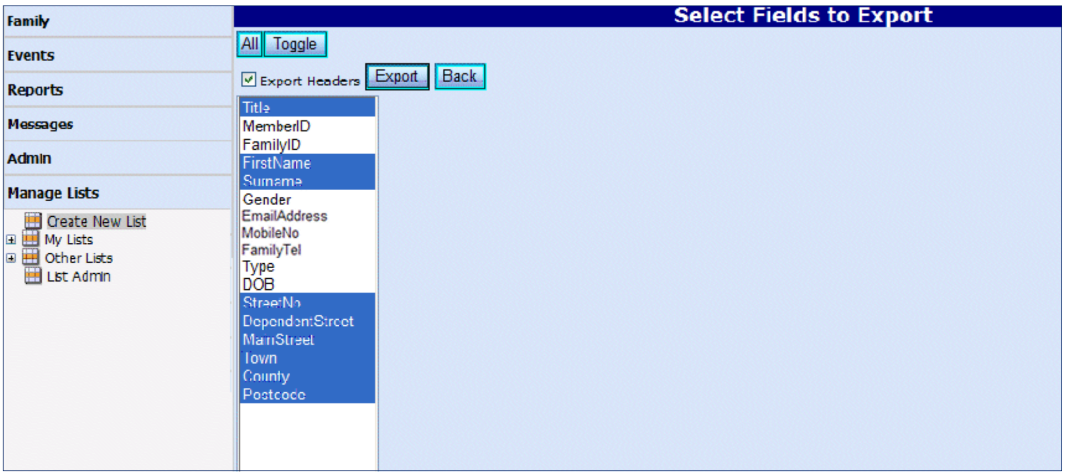


Figure 165 Selecting Fields (Headers) to Export to Excel

3. Click the **Export** button.
4. Select **Open** or **Save** as appropriate. Click the **Open** button to export the data to Microsoft Excel and open the spread sheet. Click the **Save** button to save it to a file.

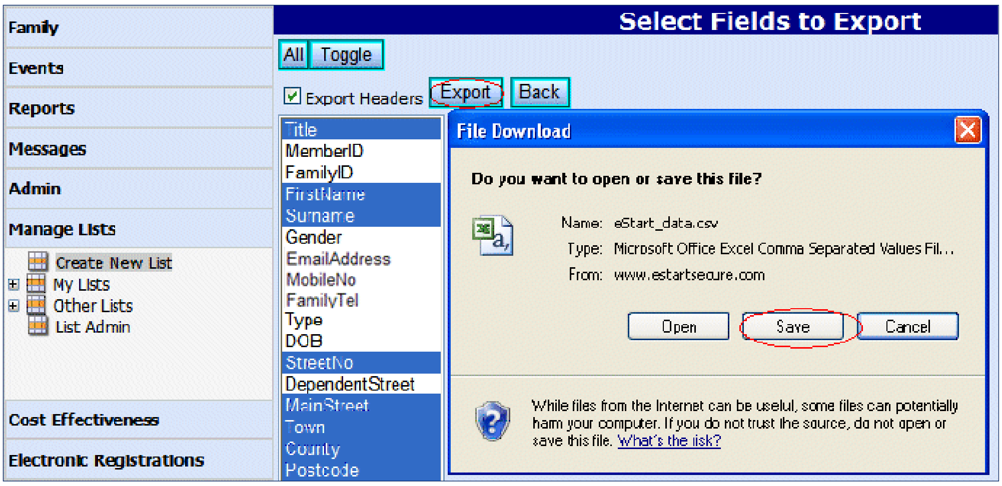


Figure 166 Confirming the export to Excel

To CTF

Use this option to export the list to an XML file.

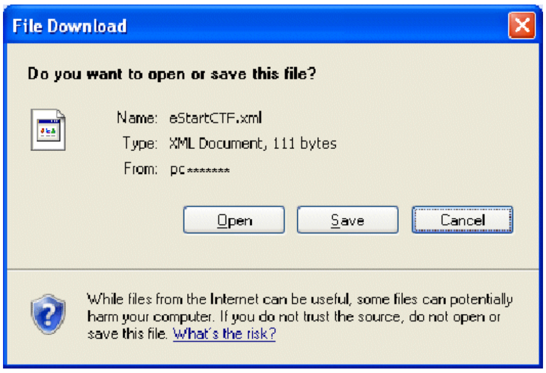


Figure 167 eStart data exported to CTF

Save the file to a suitable location.

12 | Messages

Sending Messages through eStart

There are two ways to send messages (emails and text messages) from eStart.

- To contact non-eStart users (for example parents) or a pre-defined list of eStart users, use the **Export** function within **Manage Lists**, see Manage Lists on page *93*.
- To contact eStart users (e.g. care workers), use the **Messages** function to create and send emails and SMS/text messages through the eStart database. Please note this cannot be used to contact the support desk.
- eStart users with the appropriate permissions can manage the SMS functionality, including creating templates and setting limits on who can send SMS messages and how many SMS messages can be sent.

The **Messages** functions are described below.

Sending an Email through eStart

1. Follow the menu route **Messages | Email**.

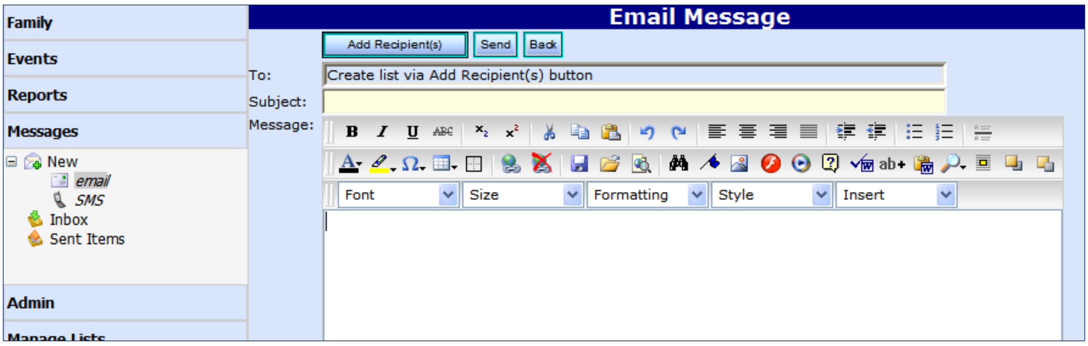


Figure 168 Sending emails through eStart

2. Type the message in the space provided.
3. Complete the **Subject** field and select **Add Recipient**. You can edit the font size and colour and can insert media files and pictures. These features and others can be found on the toolbars above the **Message** box.

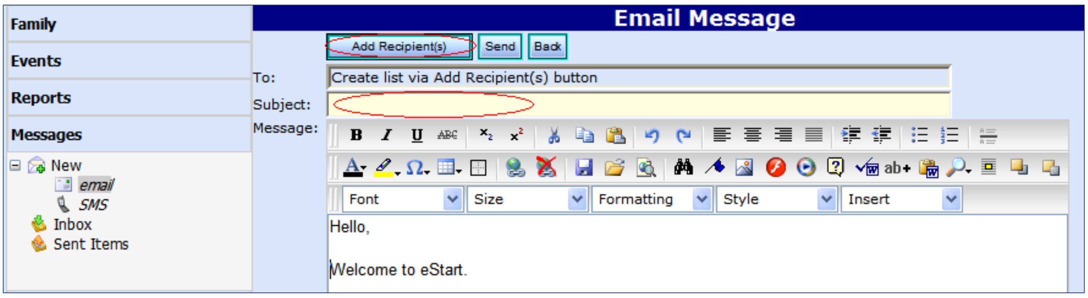


Figure 169 Email Tools

4. Click the Add Recipient button to display a list of all care workers. You can select as many recipients as you wish from this list. To select a recipient, click the Add button.

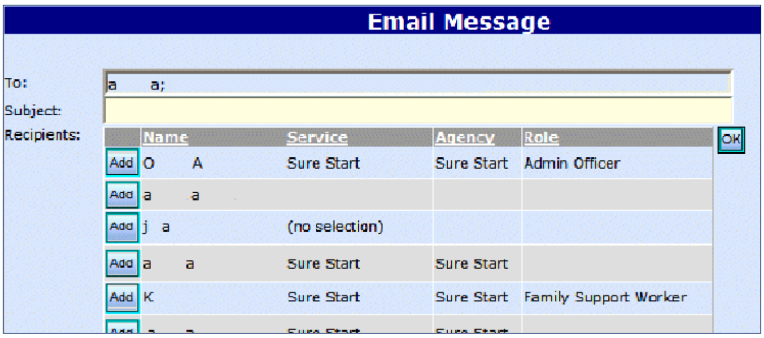


Figure 170 Selecting Email Recipients

5. Click the **OK** button.
6. Click the **Send** button.

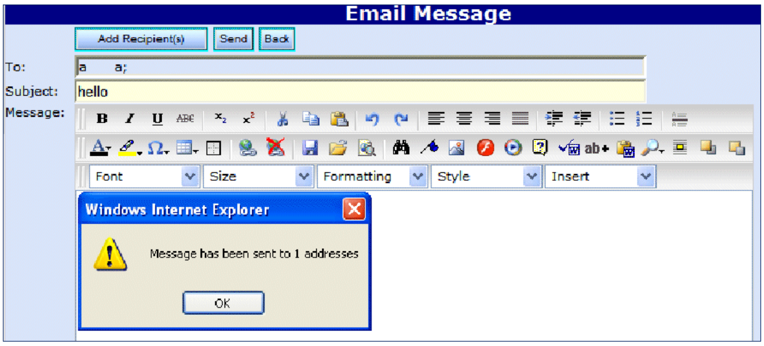


Figure 171 Email Confirmation

Your message has been sent and you will now receive a confirmation message.

Inbox

The **Inbox** stores any received messages. You can read and delete any messages from the inbox by selecting the relevant tabs. Once read, you can also reply to a message in your inbox.

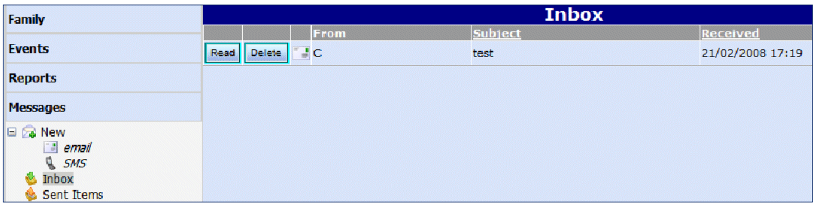


Figure 172 Message Inbox

Sent Items

Sent Items allows you to keep a record of any messages you have sent through eStart. To view a sent item, click the **Read** button.

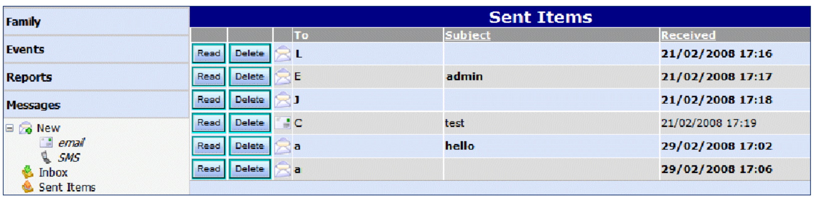


Figure 173 Messages | Sent Items

Once you have read the message, you can delete it, reply to it or return to the inbox.

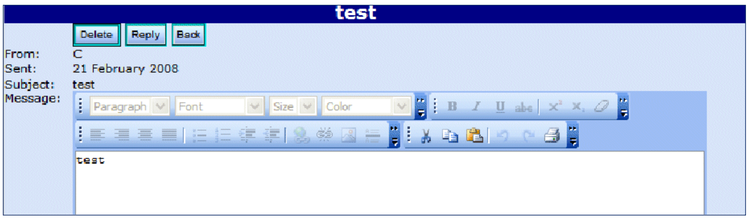


Figure 174 Message display

SMS Management Permissions

There are three levels of permissions to access the SMS management functionally in eStart. Each permission level can access different functions within the software. The access level for each group is edited via **Admin | User Groups | Manage User Groups**. For more information on editing permissions, see the *Add or Edit User Groups* topic in the *User Groups, Permissions and Security* chapter of the *eStart Web Administrator* handbook.

Permission	Enabled Functionality
Full	Users with full Messaging permissions via **Admin | Manage User Group** or with Console Management permissions via **Admin | Manage User** will have **SMS Management** enabled on the tree menu node. They can create, edit, publish and delete templates via **Messages | Message Template** They can set SMS messaging limits for users / user groups, and view balances (used / remaining) for settings, users and user groups.
Read Only Access	Users can send SMS messages, but cannot view SMS messages sent by others at their setting. They cannot create SMS templates. They do not have **SMS Management** enabled on the tree menu node
No Access	Users cannot send SMS messages and SMS Management is disabled on tree menu node.

Sending an SMS Message through eStart

***Note**: Administrators must contact **One** Support to activate this function.*

eStart enables you to send text (SMS) messages to mobile phone numbers. Before using this you must ensure that each of your chosen recipients has a valid mobile phone number set-up in their user details (these can be found via **Admin | Manage Users**).

1. Select **Messages | New | SMS** to display the **Text Message** page.

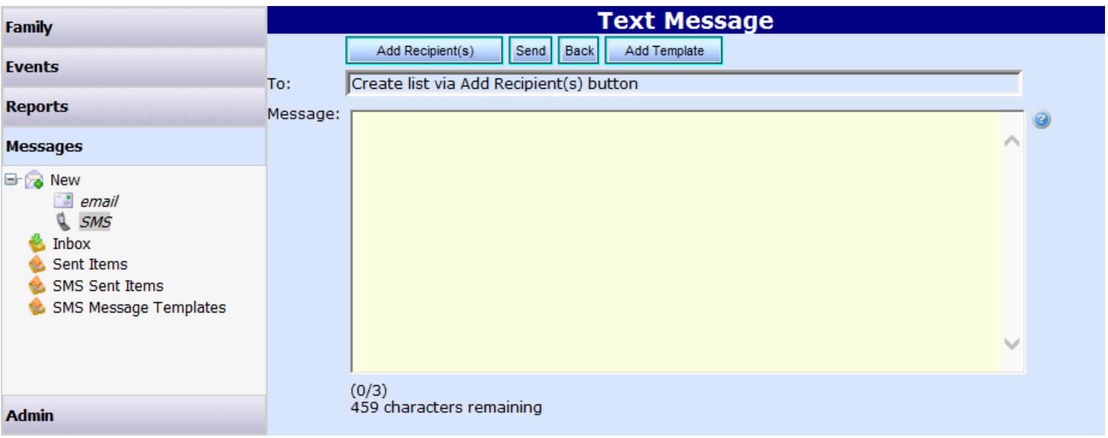


Figure 175 Sending SMS Messages through eStart

2. To select the users to receive the message, click the **Add Recipient** button to display a list of user names.

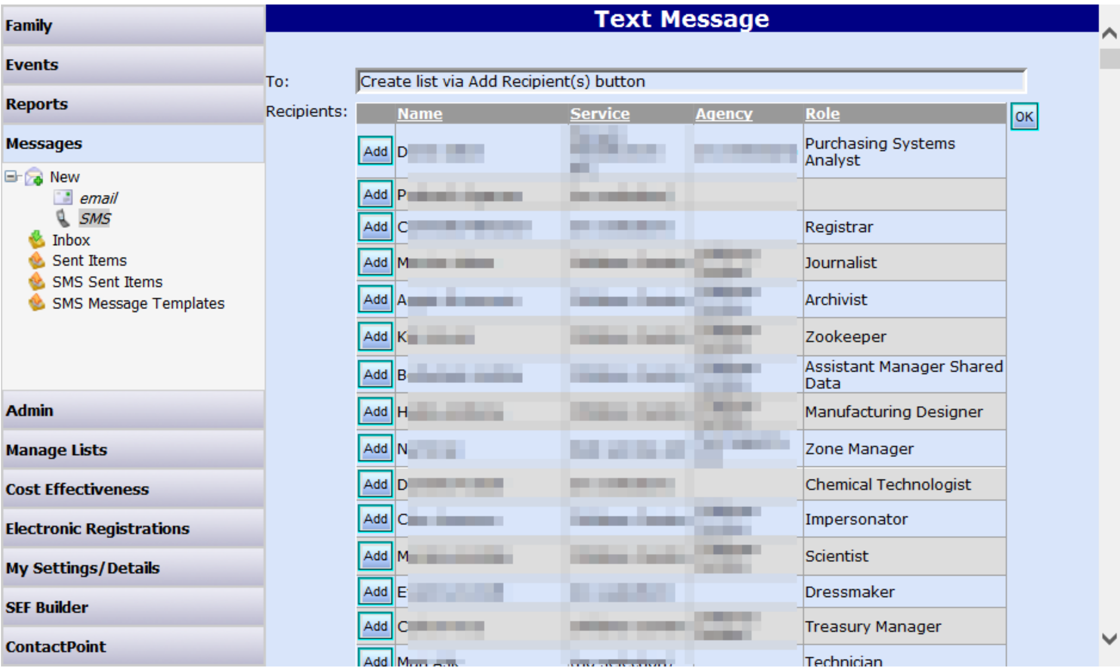


Figure 176 Message Recipients

3. Click the **Add** button for each user to whom you wish to send the message.
4. Click the **OK** button to add the users to the message.

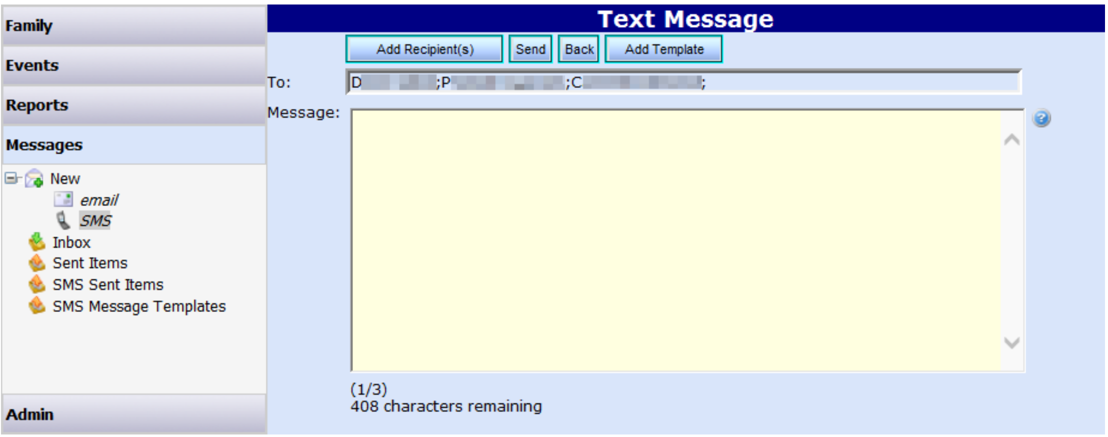


Figure 177 Recipients Added to Message

5. Enter the required **Message** or add text from a template.

   You can use the {title}, {firstname} and {surname} placeholders to personalise the message. When the message is sent, these placeholders are replaced with the actual title, first name and surname of the recipient (as recorded in eStart).

NOTE: *You can use the following special characters only: !£$%*()_+-=:@;#?,./*

To add text from a template:

a. Click the **Add Template** button to display the **Find Message Template** dialog.

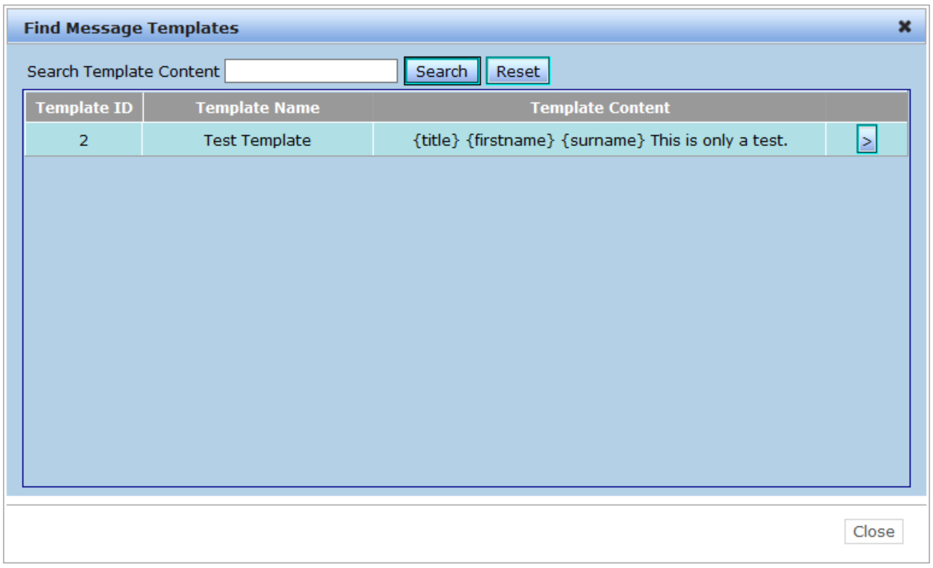


Figure 178 Find Message Templates

b. To filter the list of templates, enter your search criteria in the **Search Template Content** field and click the **Search** button.

c. Click the right chevron for the required template to add the content to your SMS message.

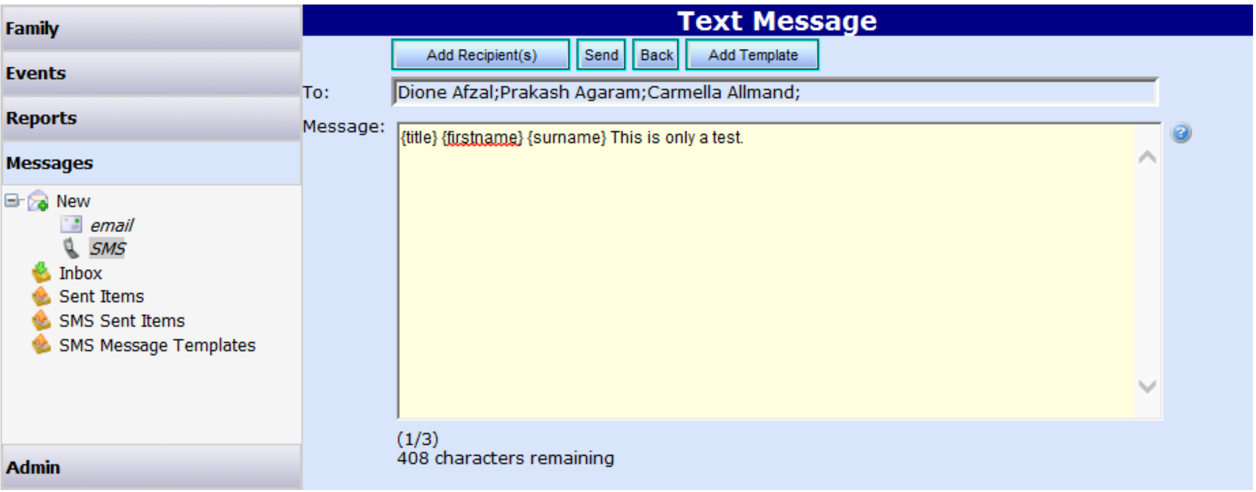


Figure 179 Text Message Completed

6. After adding all the required recipients and message information, click the **Send** button. A message is displayed to confirm that the message has been sent.

Viewing Sent SMS Messages

Users with the appropriate permissions can search for and review all sent SMS messages via **Messages | Sent SMS Sent Items**. Messages can be filtered based on **Message Content**, **Status**, **Sender Setting**, and a **Sent Date** range.

To view a sent message:

1. Select **Messages | SMS Sent Items** to display the **SMS Sent Messages** page.

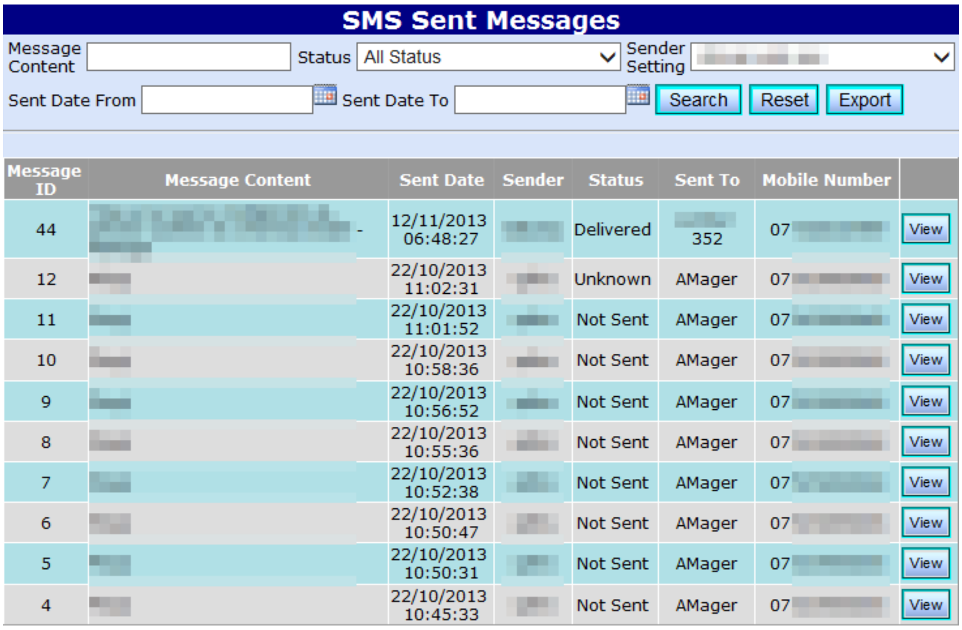


Figure 180 SMS Sent Messages

2. If required, enter any search criteria then click the **Search** button to display a list of messages that meet the criteria.
3. To view additional information about the message, click the **View** button to display the **SMS Message** screen.

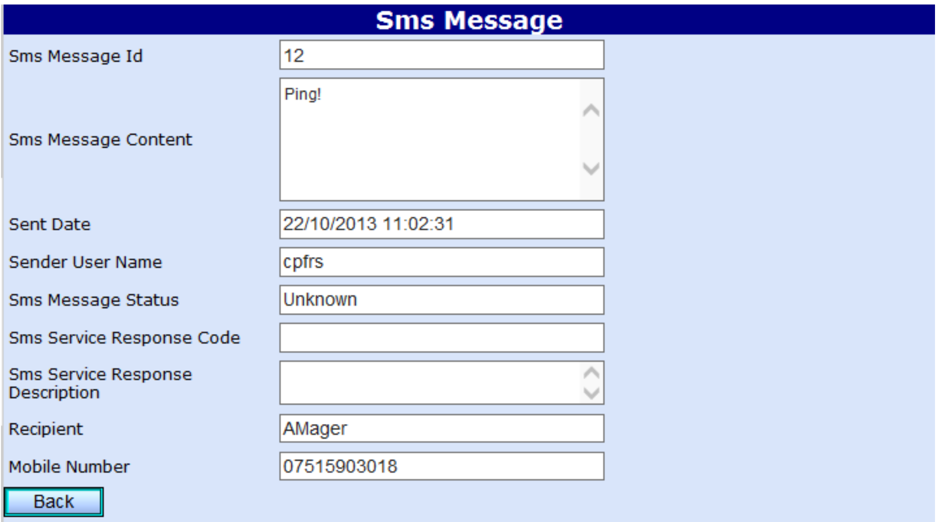


Figure 181 SMS Message

Exporting a Message List

User with appropriate permissions can export to a Comma Separated Value (CSV) file a list of sent SMS messages.

To export a list sent SMS messages:

1. Select **Messages | SMS Sent Items** to display the **SMS Sent Messages** page.

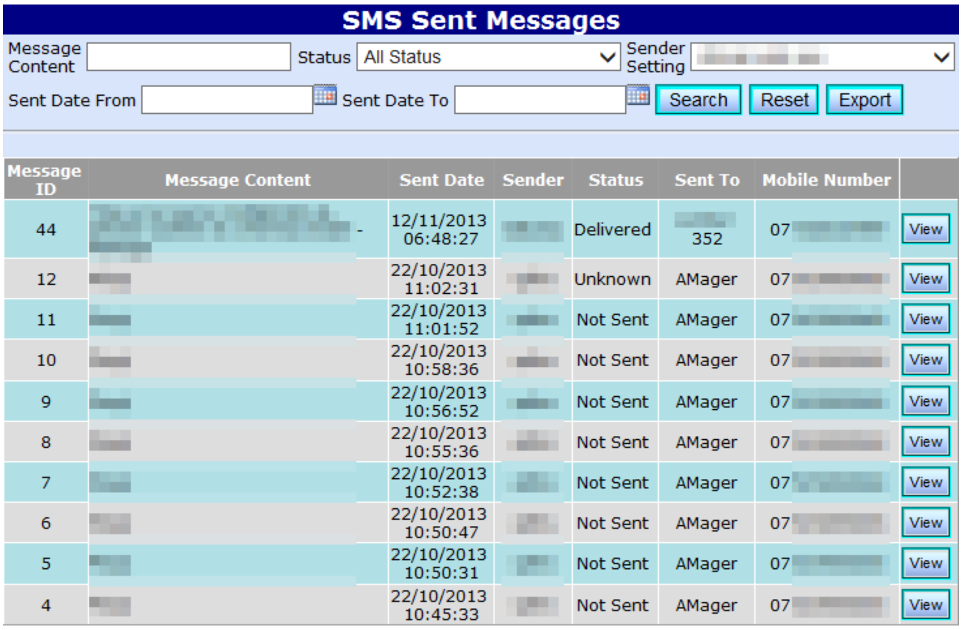


Figure 182 SMS Sent Messages

2. If required, enter your search criteria then click the **Search** button to display a list of messages. Only messages included in the returned list are included in the exported CSV file.
3. Click the **Export** button to display the **Select Fields to Export** page.

Figure 183 Select Fields to Export

4. Select the fields you wish to include in the exported file.

   Click the **All** button to select all the fields for export or press the **Ctrl** button on your keyboard and left-click on specific fields to include them.

   Click the **Toggle** button to invert the current selection.

   If you do not wish to include the column headings in the exported file, deselect the **Export Headers** check box.
5. Click the **Export** button to produce the .csv file. Internet Explorer will ask if you wish to save or open the file. Choose your preferred option and view the file in Microsoft Excel.

	A	B	C	D	E	F	G	H	I
1	SmsMessageContent	SentDate	SenderUs	SenderUs	SmsMessa	MobileNumbe	LocalAuth	SmsProviderMessageID	
2	This is to test in WINDOW:	12/11/2013 06:48	Nataraj	266	2	77[illegible]		1[illegible]	
3	Ping!	22/10/2013 11:02	cpfrs	1	5	75[illegible]		1[illegible]	
4	Ping!	22/10/2013 11:01	cpfrs	1	4	75[illegible]	[illegible]		
5	Ping!	22/10/2013 10:58	cpfrs	1	4	75[illegible]	[illegible]		
6	Ping!	22/10/2013 10:56	cpfrs	1	4	75[illegible]	[illegible]		
7	Ping!	22/10/2013 10:55	cpfrs	1	4	75[illegible]	[illegible]		
8	Ping!	22/10/2013 10:52	cpfrs	1	4	75[illegible]	[illegible]		
9	Ping!	22/10/2013 10:50	cpfrs	1	4	75[illegible]	[illegible]		
10	Ping!	22/10/2013 10:50	cpfrs	1	4	75[illegible]	[illegible]		
11	Ping!	22/10/2013 10:45	cpfrs	1	4	75[illegible]	[illegible]		

Figure 184 Exported SMS message list in Excel

Enabling/Disabling SMS User Limits

SMS message limits are only enforced if the **Apply User Limits** check box is selected in the **SMS User Limits** page. If the option is not selected, no per user limits are enforced. If the option is selected, each user must have their **Messages Remaining** limit set manually before they can send any SMS messages.

To toggle SMS user limits:

1. Select **Admin | Manage Messaging | SMS User Limits** to display the **SMS User Limits** page.

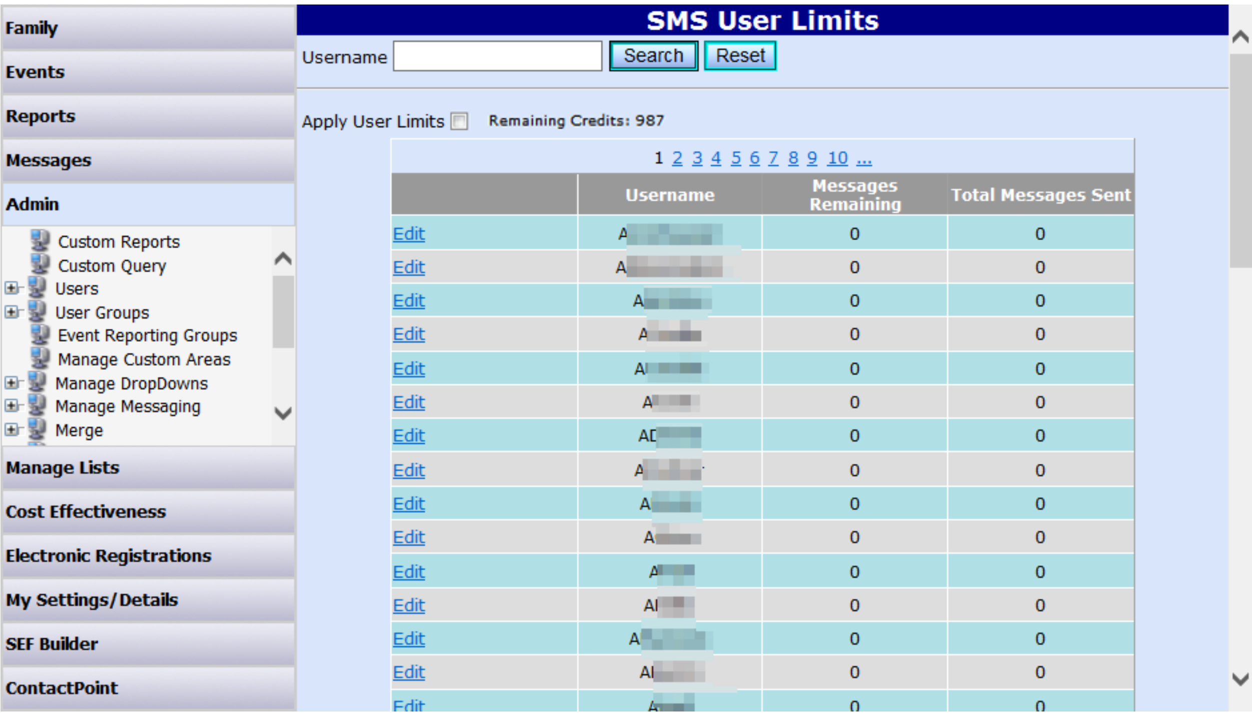


Figure 185 SMS User Limits

2. Select or deselect the **Apply User Limits** check box as required.

Viewing/Editing User SMS Limits

Users with the appropriate permissions can view the total number of SMS messages sent by other users as well as view and edit the number of message credits allocated to users.

To view the number of messages sent by a user or view/edit their remaining credits:

1. Select **Admin | Manage Messaging | SMS User Limits** to display the **SMS User Limits** page.

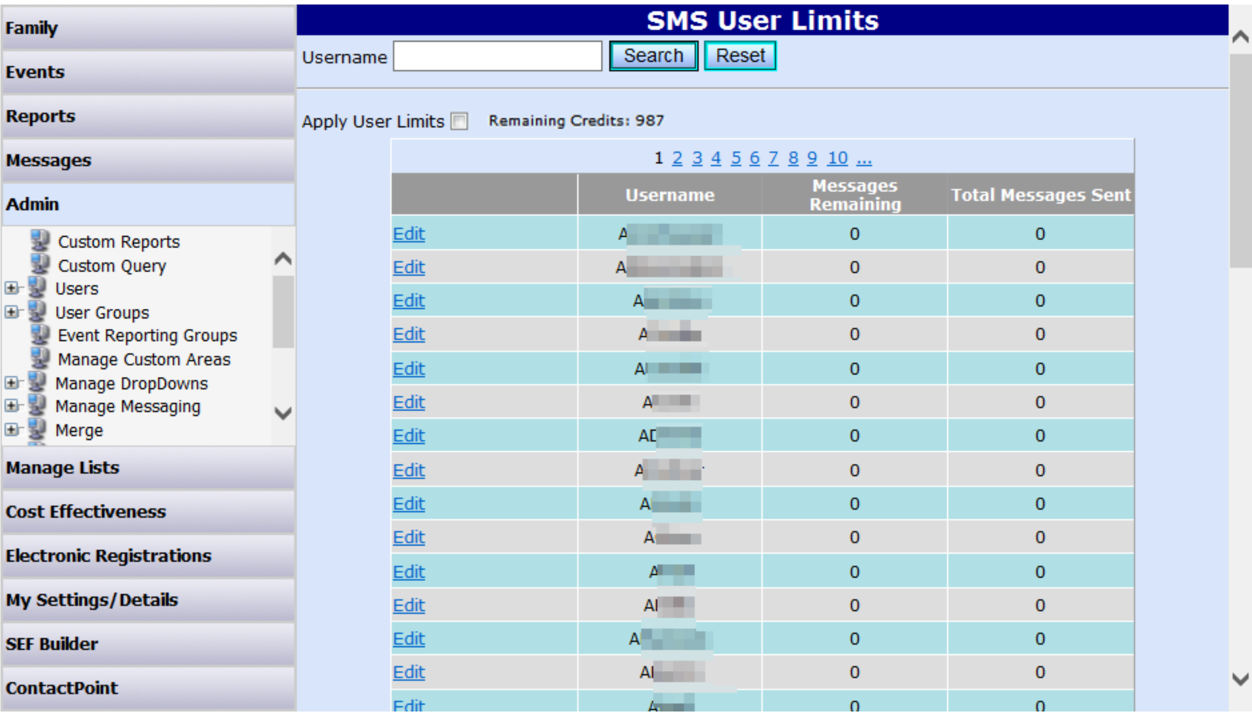
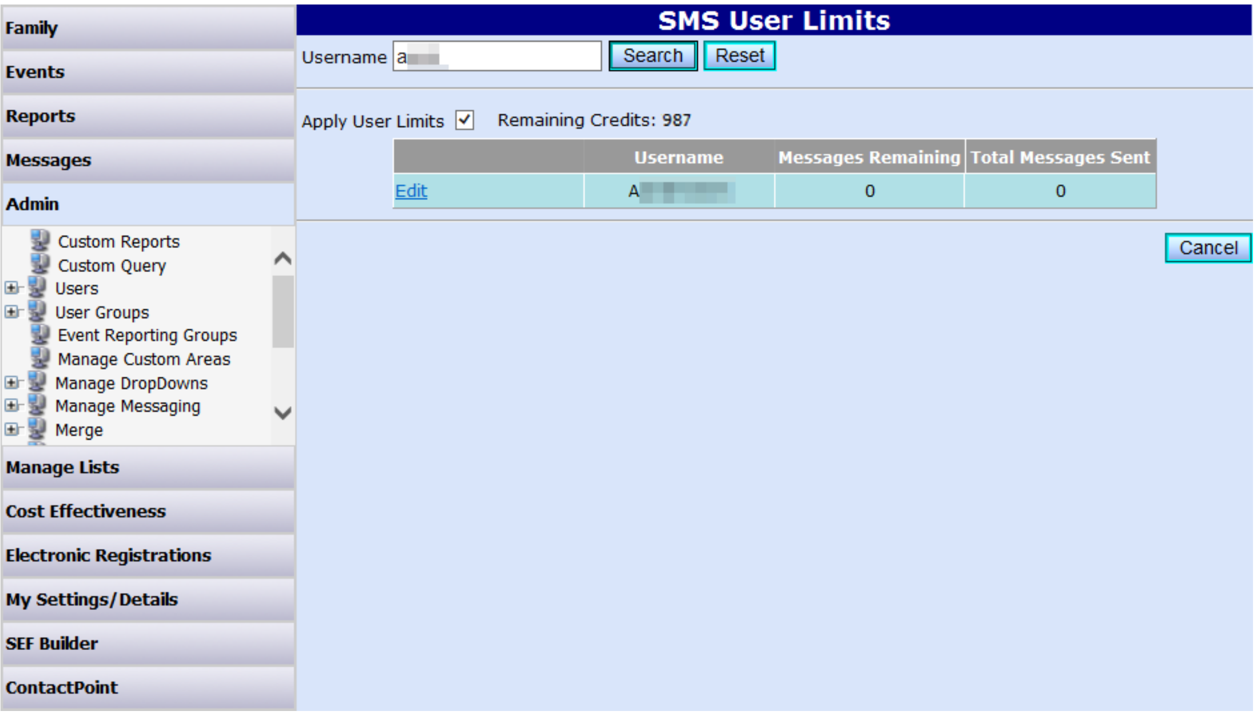


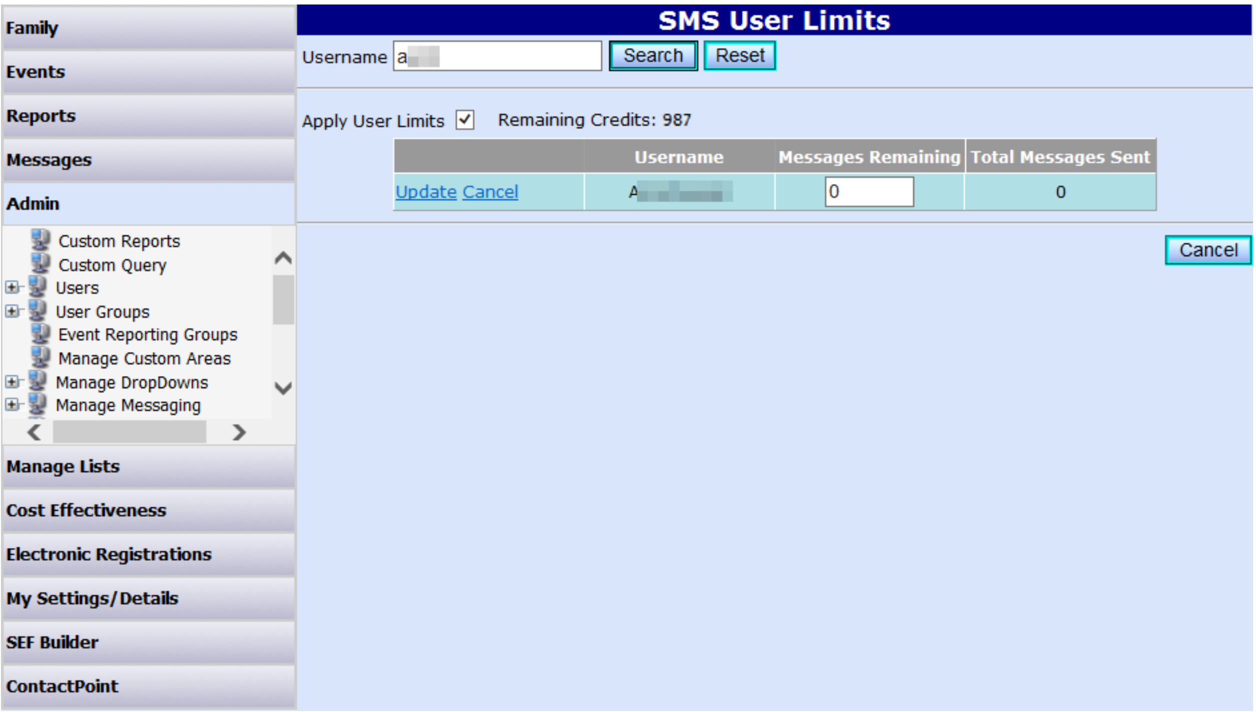
Figure 186 SMS User Limits

From this page, you can view the **Messages Remaining** and the **Total Messages Sent** for users.

2. If required, enter a full or partial **Username** then click the **Search** button to filter the list.



3. Click the **Edit** hyperlink adjacent to a **Username** to enable editing.



4. Enter a new limit for the number of SMS messages the user can send in the **Messages Remaining** field.
5. Click the **Update** button to save the change.

NOTE: *Messages limits are only enforced if the* ***Apply User Limits*** *check box is selected. If the option is not selected, no per user limits are enforced. If the option is selected, each user must have their Messages Remaining limit set manually before they can send any SMS messages.*

Creating a New SMS Message Template

Users with the appropriate permissions can create SMS message templates. The templates contain preformatted text that users can use to quickly create new SMS messages. Templates can be assigned globally, or assigned to specific settings or users.

1. Select **Messages | SMS Message Templates** to display the **SMS Message Templates** page.

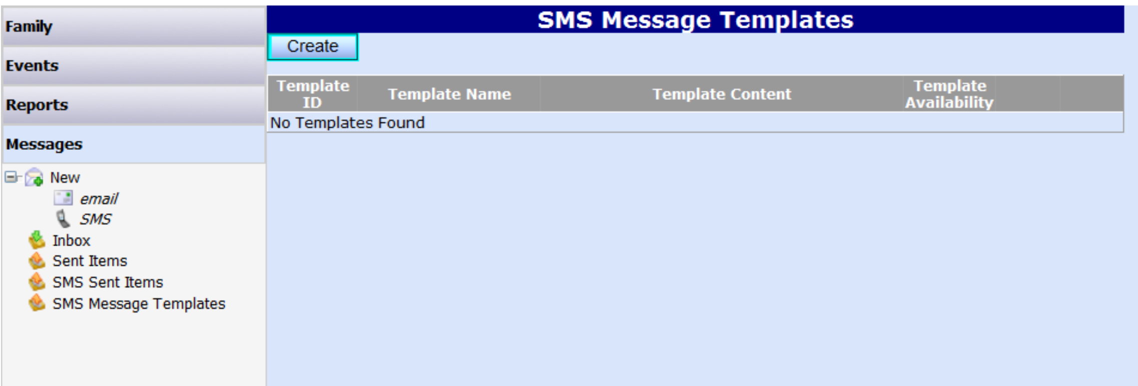


Figure 187 SMS Message Templates

2. Click the **Create** button to display the **Message Templates** page.

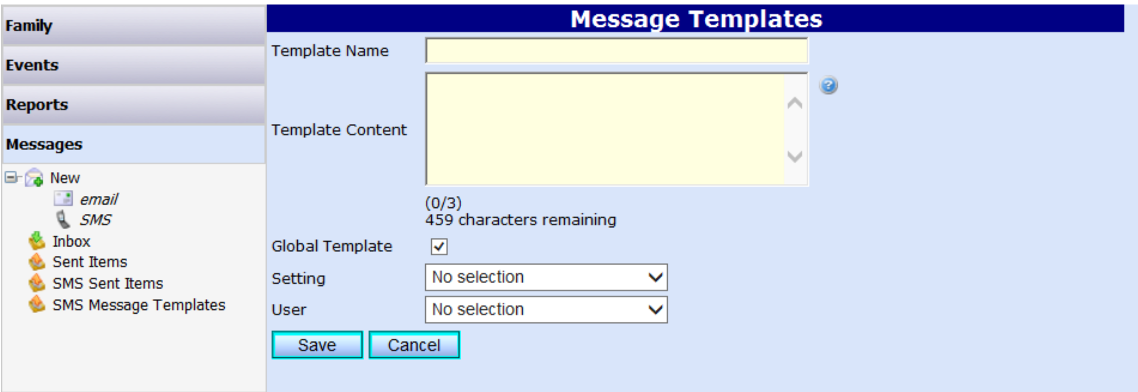


Figure 188 Message Templates

3. Enter a **Template Name**. This is the name that is displayed to eStart users when they search for a template.
4. Enter the **Template Content**. You can use the {title}, {firstname} and {surname} placeholders to personalise the message. When the message is sent, these placeholders are replaced with the actual title, first name and surname of the recipient (as recorded in eStart).

***NOTE:** You can use the following special characters only: !£$%*()_+-=:@;#?,./*

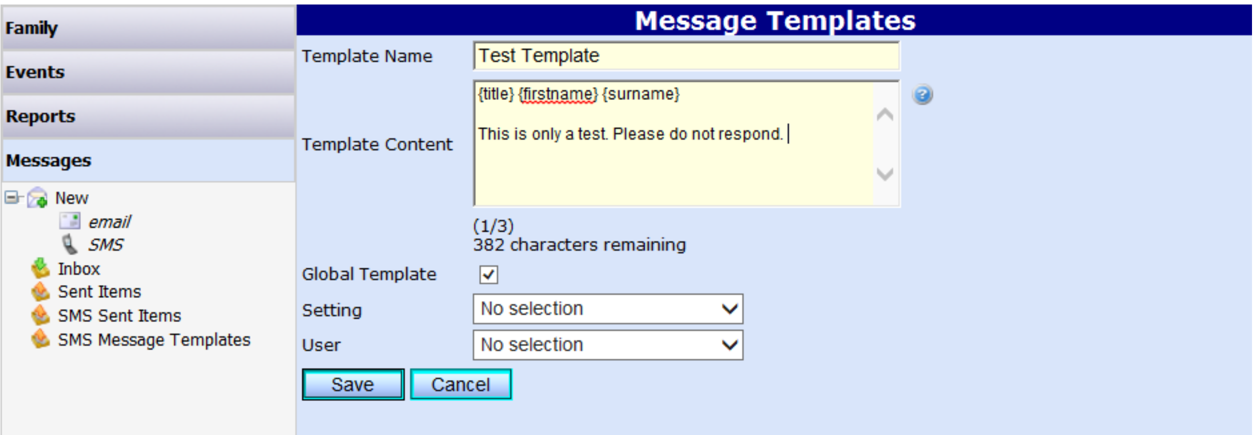


Figure 189 Message Templates

5. If required, assign the template to a specific **Setting** or **User**.

   If a setting or user is selected, the Global Template check box is deselected automatically and the template is only available to the selected setting or user.
6. Click the **Save** button.

Editing an SMS Message Template

1. Select **Messages | SMS Message Templates** to display the **SMS Message Templates** page.

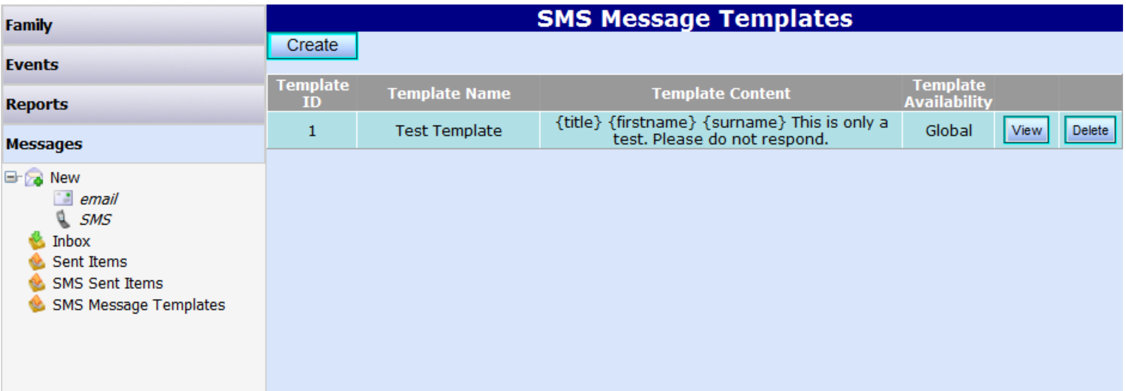


Figure 190 SMS Message Templates

2. Click the **View** button adjacent to the template you wish to edit to display the **Message Templates** page.

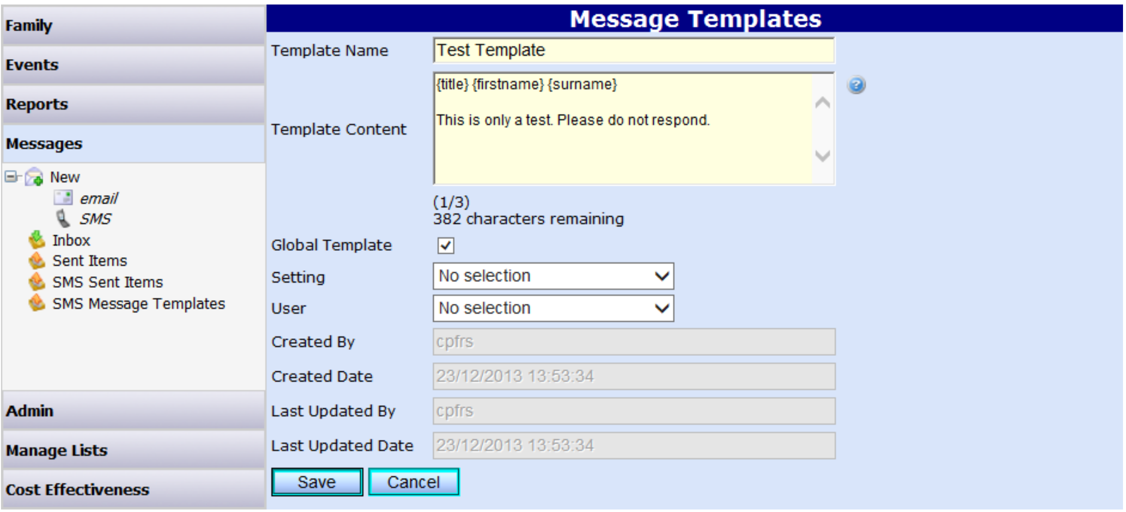


Figure 191 Message Templates

3. Edit the template as required then click the **Save** button.

Deleting an SMS Message Template

1. Select **Messages | SMS Message Templates** to display the **SMS Message Templates** page.

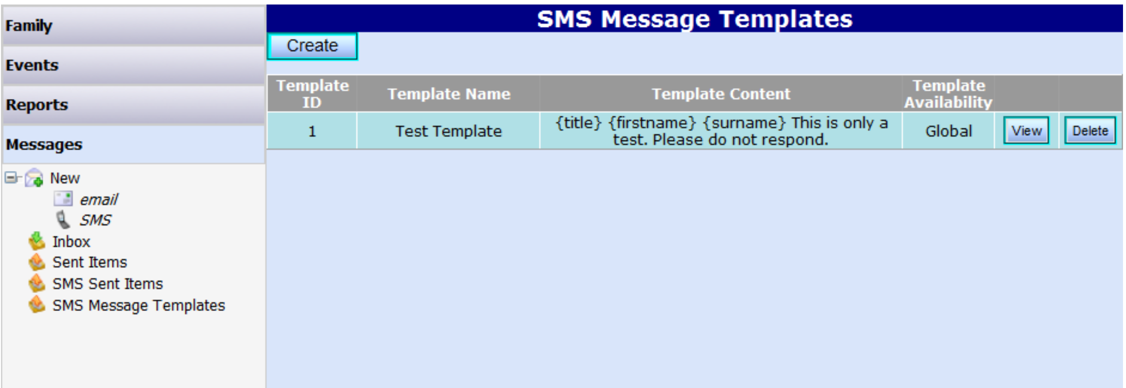


Figure 192 SMS Message Templates

2. Click the **Delete** button adjacent to the template you wish to delete to display a confirmation dialog.
3. Click the **OK** button to complete the deletion process.

Managing SMS Sender Names

When sending SMS messages, only the first 11 characters of a setting's name are used in the sender field. By default, these are the first 11 characters of the children's centre name, although you can customise the names for each of your settings.

To edit the SMS sender name for a setting:

1. Select **Messages | Manage SMS Sender Names** to display the **Manage SMS Sender Names** page.

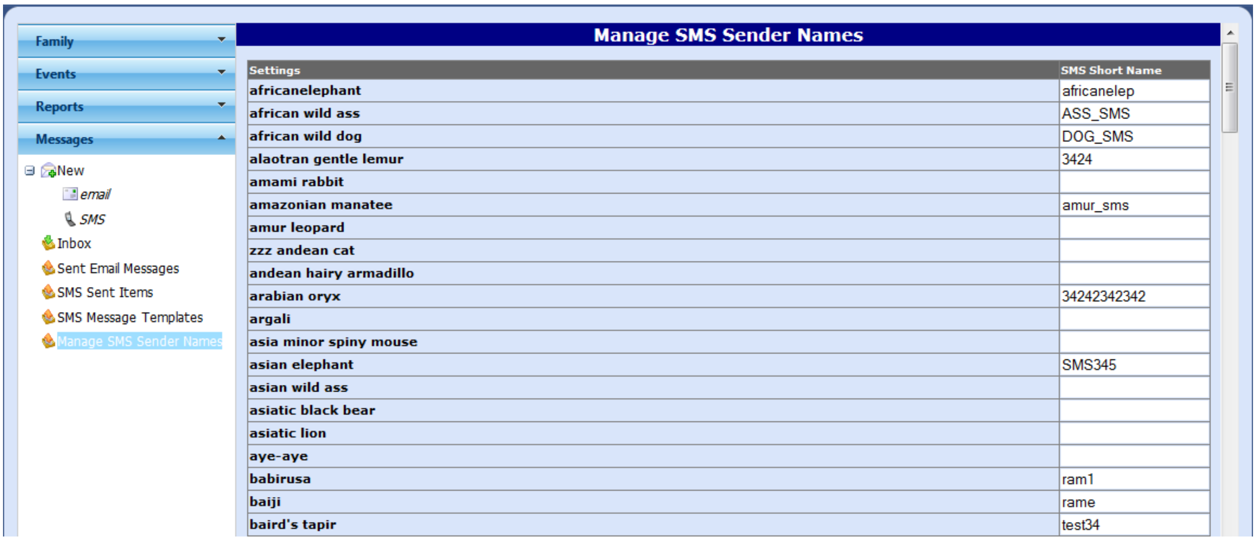


Figure 193 SMS Message Templates

2. Enter the updated **SMS Short Name** for the required setting.
3. Scroll to the bottom of the page and click the **Save** button to display a confirmation message.
4. Click the **OK** button.

13 | TCP

Training Centre Plus (TCP) replaces Job Centre Plus. TCP is designed to empower carers who wish to get into work or return to the workplace by providing valuable marketable skills and, in some instances qualifications. The TCP module enables you to create TCP courses made up of events run by your children's centre.

Setting up Accreditors and Qualifications

Accreditors and Qualifications are set up for TCP courses via **Admin | Manage Dropdowns | TCP Accreditors** and **TCP Qualifications**. It is possible to add a TCP course without populating any of these fields (which are part of the **Add Course** page), but it is useful to pre-populate these fields. If you do not have the correct permissions to access this area then you need to ask an eStart administrator to do this for you.

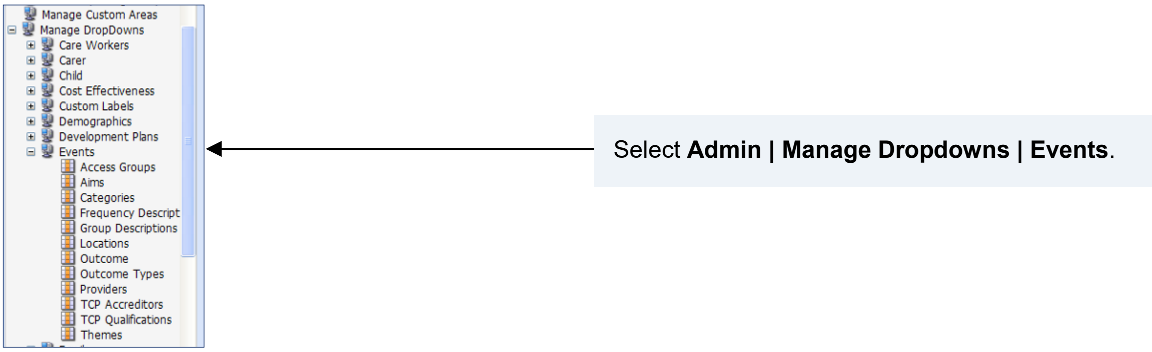


Figure 194 Setting TCP Accreditors and Qualifications

To add an accreditor, follow the menu route **Admin | Manage Dropdowns | TCP Accreditors** and click the **Add** button.

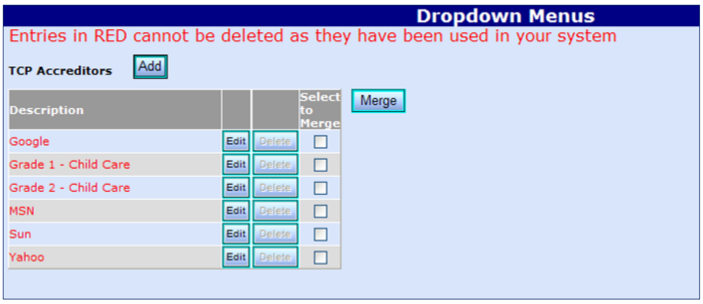


Figure 195 Adding a TCP Accreditor

To add a qualification, follow the menu route **Admin | Manage Dropdowns | TCP Qualifications** and click the **Add** button.

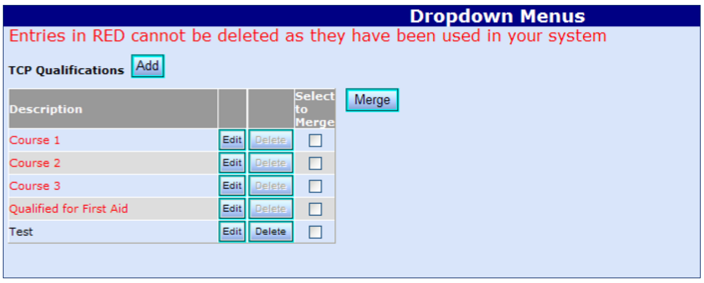


Figure 196 Adding a TCP Qualification

When you have set up qualifications and accreditors they can be selected on the **Add TCP Course** page, which is available for any event type defined as a TCP event. – see *Figure 197*

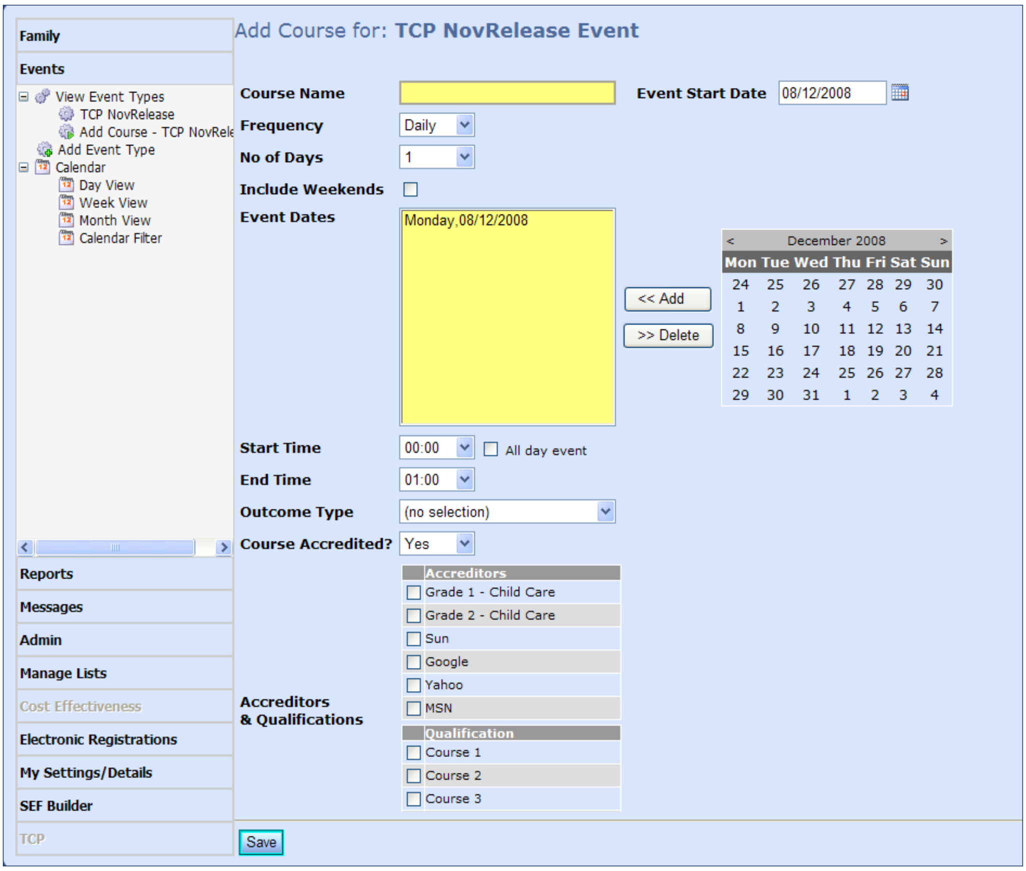


Figure 197 Add TCP Course page with Accreditors and Qualifications

Add a TCP Course

To add a new TCP course:

1. Follow the menu route **Events | View Event Types**. The **Event Type List** page is displayed.

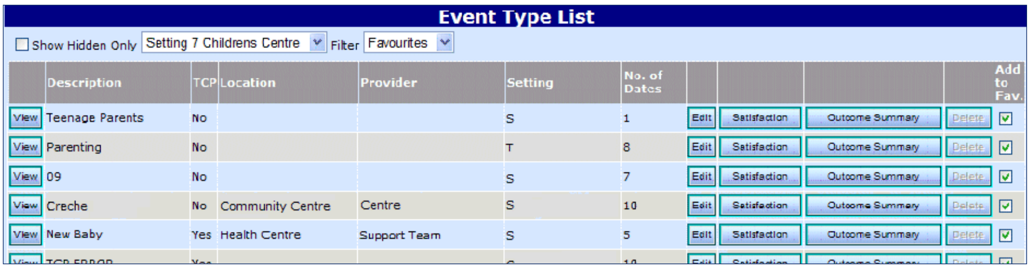


Figure 198 Event Type List

2. Click the **View** button for a TCP event type (with **Yes** in the TCP column)
3. Click **Add Course** in the left-hand menu.

> ***Note**: The **View Event Type | Add Course** menu option is available when an event type defined as a **TCP** event type is selected (**Add Course** replaces **Add Date**).*

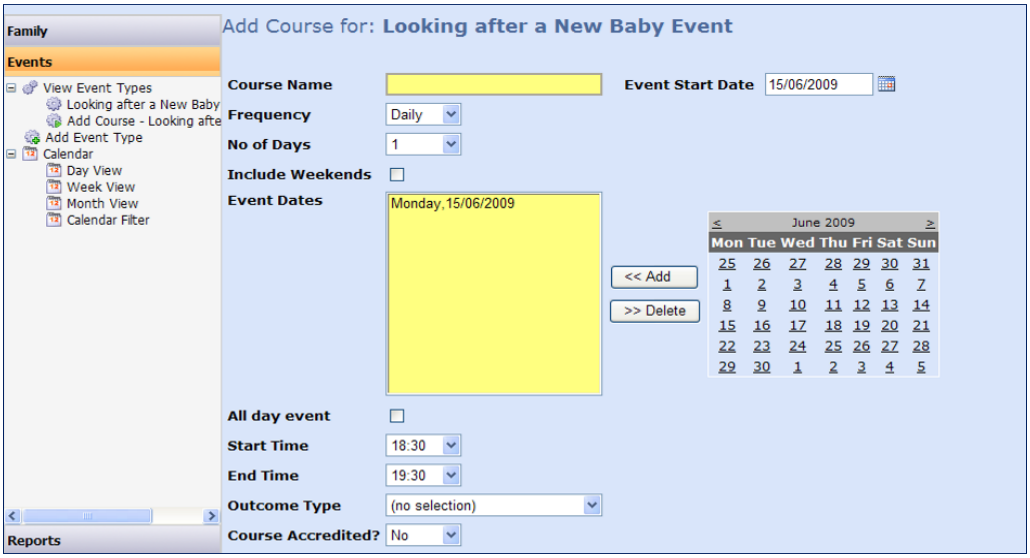


Figure 199 Adding a TCP Course

Enter all the appropriate course details. A **Course Name** must be added before an **Event Date** can be added or saved.

If you have set up accreditors and / or qualifications (see above), they are displayed when you select **Yes** from the **Course Accredited?** dropdown.

Edit TCP Course

To edit a TCP course, follow the menu route **Events | View Event Types** to display the **Event Type List** screen – see *Figure 198*.

Click the **View** button on a TCP event, then click the **Edit** button.

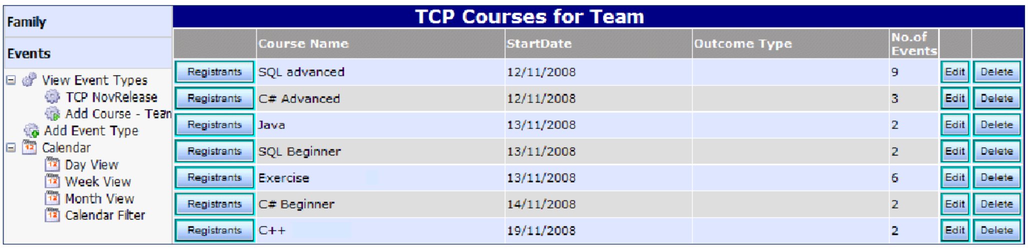


Figure 200 Edit a TCP Course

When updating, all the event dates that have not been saved are displayed in the **Event Date** list with a light blue background.

For example, in *Figure 201*, Friday 03/07/2009 has not been saved (Friday 12/06/2009 is dark blue because it has been clicked on to select it). The default Start Time is set to the time specified. This course now has **Course Accredited?** set to **Yes**, so the accreditors and qualifications can be selected.

You can also delete a TCP course date from this screen, by selecting it and clicking the **Delete** button.

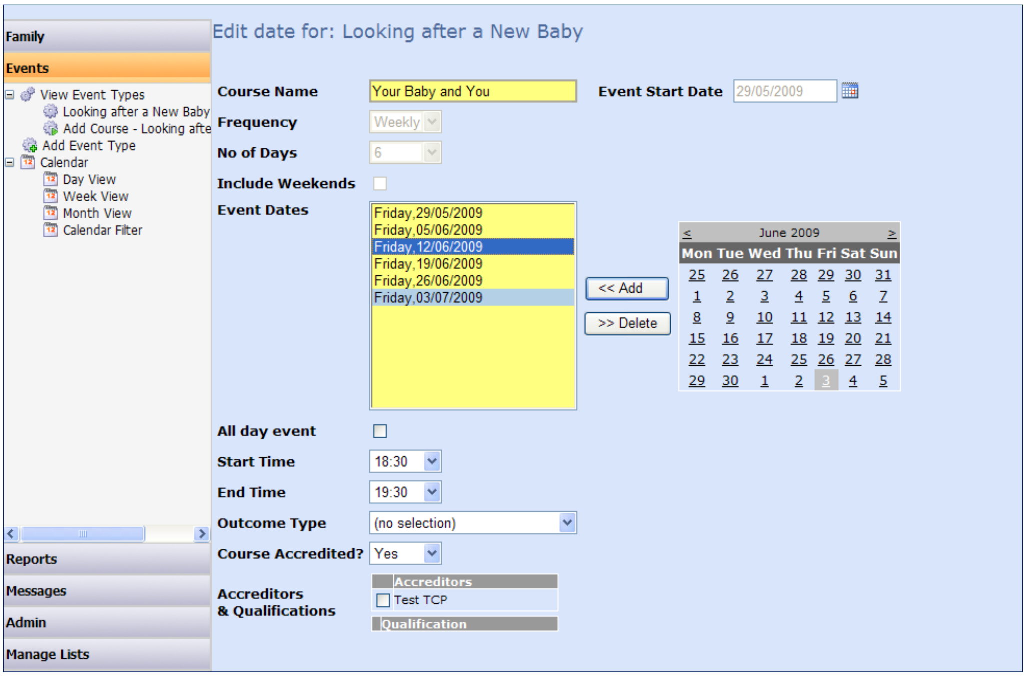


Figure 201 Deleting a TCP Course

Registrants

Registrants can be members, care workers or attendees. To add, edit or delete registrants, follow the menu route **Events | View Event Types** to display the **Event Type List** page, see *Figure 198*

Click the **View** button on a TCP event then click the **Registrants** button against a TCP Course (see *Figure 200*) to display a screen as below:

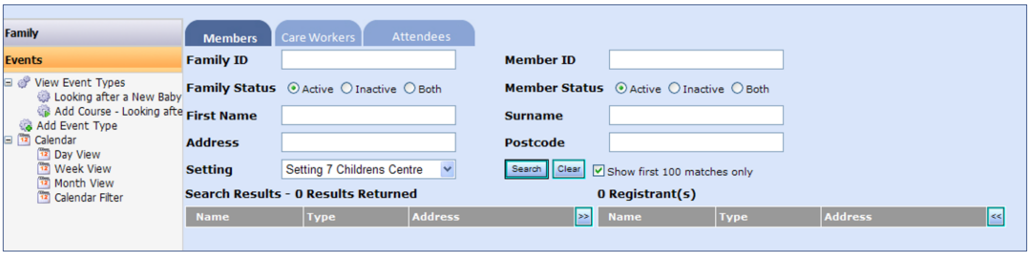


Figure 202 TCP Registrants Screen

- Each TCP Course must have a minimum of one **Member** and one **Care Worker**.
- You can move between the **Members**, **Care Workers** and **Attendees** tab without losing any data, however, the **Members** search result will disappear when moving between the tabs (but not any members on the registrants list).
- All the members must be carers (not children).

On the **Care Worker** tab, the **Settings** dropdown acts as a filter on available care workers.

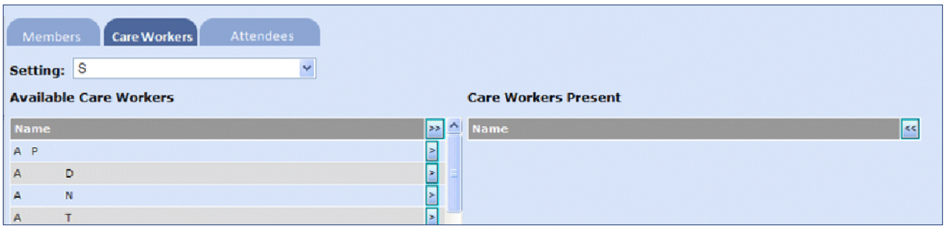


Figure 203 TCP Care Workers tab

The **Attendees** tab does not display any data until the members and care workers have been saved.

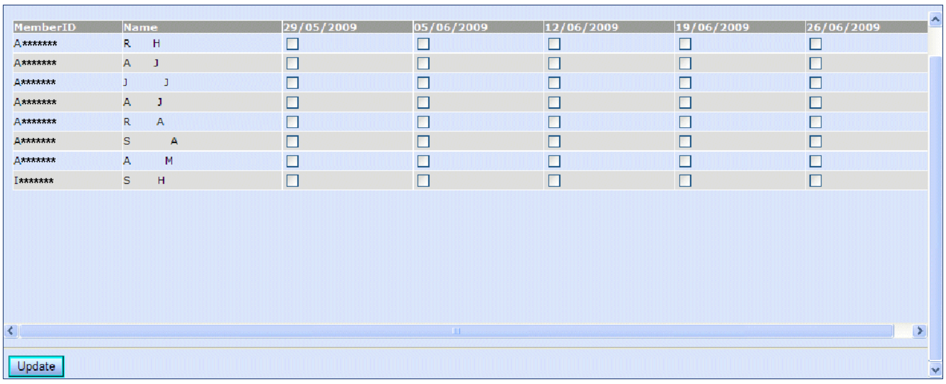
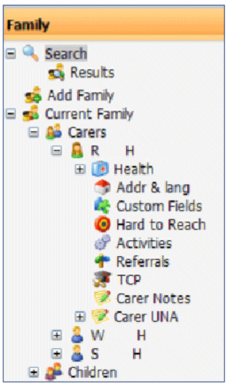


Figure 204 TCP Attendees tab

On the **Attendees** tab you can then select any course events (dates) that the carers registered for that course have attended, then click the **Update** button (you might have to scroll down to the bottom of the screen using the right hand side scroll bar to see the button).

Carer TCP Courses



Search for the family then click on **Carers** in the left hand menu, then on the name of the actual Carer.

This icon indicates carers who have a TCP (Training Centre Plus) course in their records.

Figure 205 Carer TCP Section

To add a TCP course for the selected carer, select **TCP** from the left hand menu.

When you click the TCP icon on the left hand side menu, the following screen is displayed.

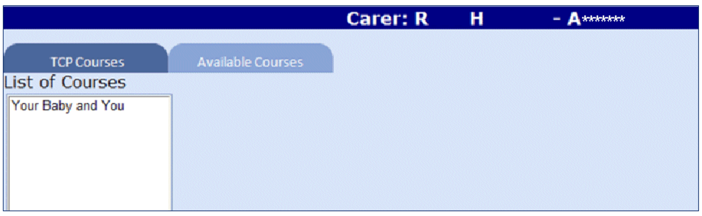


Figure 206 TCP Courses tab

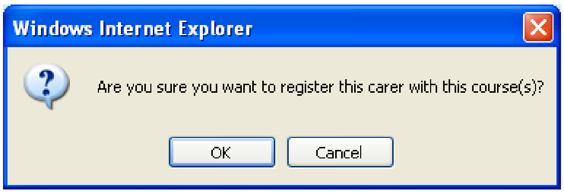
If the carer has not yet attended any courses, this is indicated on-screen. Click the **Available Courses** tab to see the courses that are running today or on any future date.

Figure 207 TCP Available Courses tab

The **Available Courses** tab displays the **Course Name**, **Start Date**, and a **Register** check box. The **Register** check box indicates whether or not the course is available and allows you to register the carer onto the course.

- If the check box is empty and has a pale outline then it has not yet been enabled and the course is not available to register the carer. In order to enable the check box you need to go to the **Events** section to add members and care workers to this course.
- If the check box has a dark outline then it is enabled and you can register the carer to the course.

After you select the **Register** check box, click the **Register** button to save this carer to the course. A pop up message is displayed:



When you click the **OK** button, the following screen is displayed. Note that the **Registered** check box is now selected and disabled for the selected courses:

Figure 208 TCP Available Courses tab with registered courses

If you click the **Register** button without selecting any course, the following message is displayed:

Click the **OK** button then display **TCP Courses** tab to see the saved courses.

TCP

To see details of the course dates and carer attendance, select one of the courses from the list box.

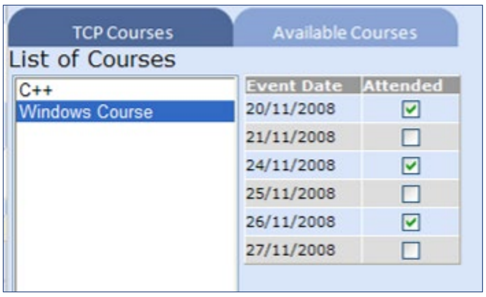


Figure 209 Carer TCP Course Date and Attendance details

14 | Reports

Reports Overview

The **Reports** menu enables you to produce a wide variety of reports from eStart, in various formats.

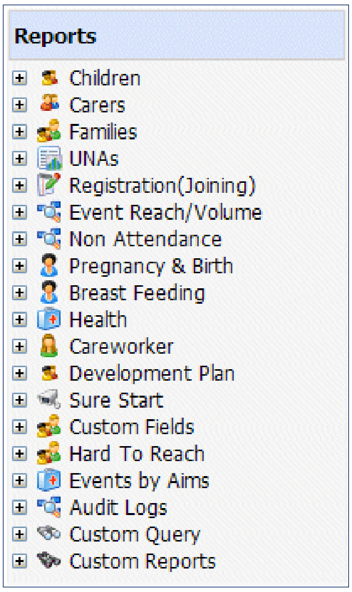


Figure 210 Reports menu

***Note**: For descriptions of all the eStart Reports, see* eStart Reports Extended Descriptions.pdf.

Many of the standard eStart reports are available as both reach reports and volume reports. These report on the same data but use a different type of analysis to generate the results.

Reach Reports

- Reach reports count an individual member or family once, no matter how many times they are recorded.

  For example, if an individual is seen at an event six times, attended six different events or three events twice each, they are only counted once. This is displayed in the report as 1.
- **Event Details** are not included in reach reports because the details cannot be matched to the people attending and the subtotals in a reach count summary do not add up to the overall total.

Volume Reports

- Volume reports count an individual member or family each time they appear.

  For example, if an individual is seen at an event six times, attended six different events or three events twice each, they are counted six times. This is displayed in the report as 6.
- **Event Details** are included in volume reports because the details of these reports match the people attending and the subtotals in a volume count summary table add up to the overall total.

Queries

eStart contains pre-defined simple SQL queries to enable you to view the data in report format. They have no, or very few, criteria available for users to select.

There are two types of queries:

- **Standard**: Supplied to every authority. See Standard Queries on page *140*.
- **Custom**: Created by Capita One on request and supplied to the requesting authority. These can be imported from the repository by other hosted customers and adapted for their own use. See *Custom Queries* on page *140.*

If a query has the option to enter a start and end date, then these refer to the date range within which the activities being reported on have occurred, not the dates of the actual activities themselves.

For example, the date range of a **Workless Household** query displays all **Workless Household** records falling within that time period, not just those that start and finish on the specified dates.

Running a Report

Report Criteria

When a report is selected, a report criteria page is displayed, as in the following example.

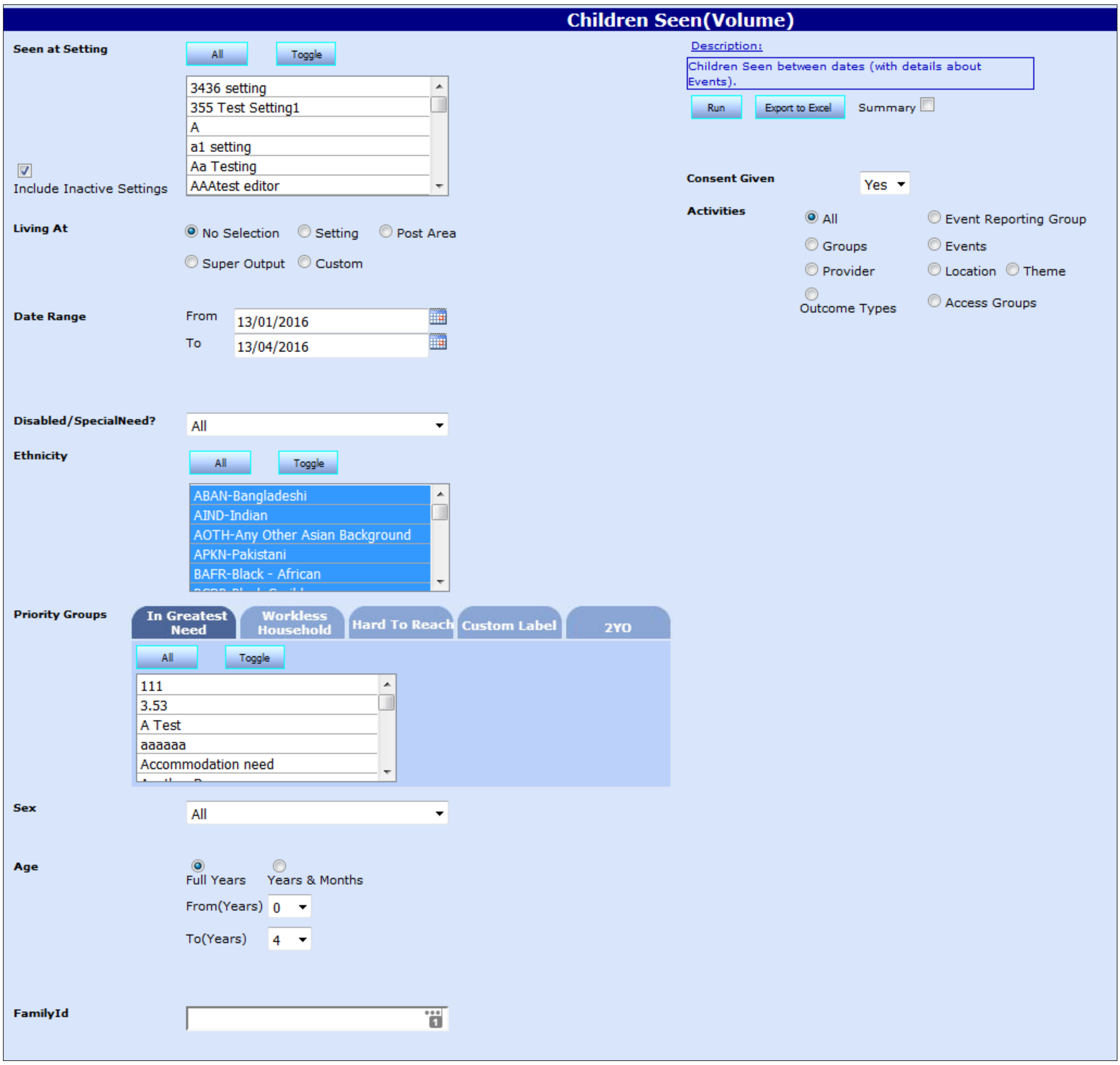


Figure 211 Report Criteria example

In this example, the user has chosen:

- Three **Settings** that the children were **Seen at**
- Two **Super Output Areas** that the children are **Living at**
- All **Ethnicities**
- Eight **Events**.

Criterion	Description
Activities	This enables you to include **All** activities, or to filter the report by selected **Groups**, **Providers**, **Outcome Types**, **Event Reporting Groups**, **Events**, **Locations**, **Themes** or **Access Groups**. If any of the radio buttons except **All** is selected, you can then select from the options in the list below. This lists all options relevant to the radio button at the settings selected for the report. Use Shift + click or Ctrl + click to multi-select options.

Criterion	Description
Age	**Full Years** or **Years and Months**. This is set to 0 – 4 years by default (includes all children under 5)
Care Worker Surname	Filters the report by this surname. A partial surname can be entered.
Care Workers	Choose from **All** care workers, or select the **Care Workers** radio button, then select the names you require from the list below. This lists all care workers linked to the selected settings (via **Admin | Manage Dropdowns | Care Workers**). Use Shift + click or Ctrl + click to multi-select names.
Consent Given	Select from **Yes**, **No** or **All**
Currently Smoking	Select this check box to only report on carers who are currently recorded as being smokers in their smoking history.
Custom Type	The custom field label on which you wish to report.
Date Range	This enables you to limit the report results to a specified date range.
Disabled?	Select this check box to report on any current disabilities recorded for each individual family member.
Ethnicity	Any number of ethnicities can be selected for reporting. Click the **All** button to choose all ethnicities, or use Shift + click or Ctrl + click to multi-select. The Toggle button toggles your choices between selected and deselected.
Events	Choose from **All** events, or select the **Events** radio button, then select the events you require from the list below. This lists all events at the settings selected for the report. Use Shift + click or Ctrl + click to multi-select events.
Family ID	If a family ID is entered, the report displays only members with that ID..
Hard to Reach	Select the check box to report on children, carers or families who have a Hard to Reach criterion on their record.
Living at	This option enables you to filter the report by families living in a selected **Setting**, **Post Area**, **Super Output** or **Custom Area**. Select the option to display an appropriate dropdown. Select the required option from the dropdown. Select No Selection if you do not wish to filter the results by this criterion.
Log Type (Audit Log reports only)	Filters the report to display **All**, or only **Audited** or **Accessed** information.
Lone Parent	Select this check box to report on whether or not the member has the **Lone Parent** check box on their **Carer Details** page selected.
Parent	Select this check box to report on members who are recorded as having parental responsibility for a child.
Pregnant	Select this check box to only report on carers who are currently recorded as being pregnant.

Criterion	Description
Providers	Choose from **All** providers, or select the **Providers** radio button, then select the names you require from the list below. This lists all providers for the events selected for the report, and also includes the option **Events without Providers**, to enable you to report on such events. Use Shift + click or Ctrl + click to multi-select provider names.
Quarter Range (**Quarterly Profile** reports only)	Select the quarter you wish to report on as **This Quarter**. The **Previous Quarter** and **This Quarter Previous Year** dates are calculated automatically and the results from those quarters are also returned in the report for comparison.
Relationship to Child (**Carer** reports only)	A dropdown, listing all the descriptions defined via **Admin | Manage Dropdowns | Carer | Carer Descriptions**.
Seen at Setting	This enables you to filter the report by families registered at a particular setting or range of settings. This does not return families who are affiliated, rather than registered to, these settings. Any number of settings can be selected for reporting, and this can include inactive settings. Click the **All** button to choose all settings, or use Shift + click or Ctrl + click to multi-select. The Toggle button toggles your choices between selected and deselected. Some reports have an additional **Or Affiliated** check box. Select this check box to return all children, carers or families who are registered or affiliated to the selected settings and who meet the other report criteria.
Sex	Select one of **All**, **Female**, **Male** or **Not Known** to only report on members of this gender.
Teenager	Select this check box to report whether or not members are aged within the range of ≥13 to <20 years old at the event date.
User Name (Audit Log reports only)	Choose from **All** users, or select the **Users** radio button, then select the names you require from the list below. This lists all users linked to the selected settings (via **Admin | Users**). Use Shift + click or Ctrl + click to multi-select names.
Year Range (**Annual Profile** reports only)	The **Year Type** determines the months available for the **Year Range**. Select the year range you wish to report on as **This Year**. The **Last Year** is calculated automatically and is used to calculate the results for the **Last Year** column in the report output.
Year Type (**Annual Profile** reports only)	Select the **Year Type** from calendar, financial or academic.
Year (**Quarterly Profile** reports only)	Select the year you wish to report on as **This Year**. The **Last Year** is calculated automatically and is used to calculate the results for the **This Quarter Previous Year** column in the report output.

Report Output

- Click the **Run** button to produce a report and summary based on your parameters.
- Click the **Export to Excel** button to create a .csv file of the report (without a summary) and display it in Microsoft Excel.
- Select the **Summary** checkbox before clicking either the **Run** button or the **Export to Excel** button to generate the **Summary** section of the report only.

Run

Click the **Run** button to display a report as in the following example:

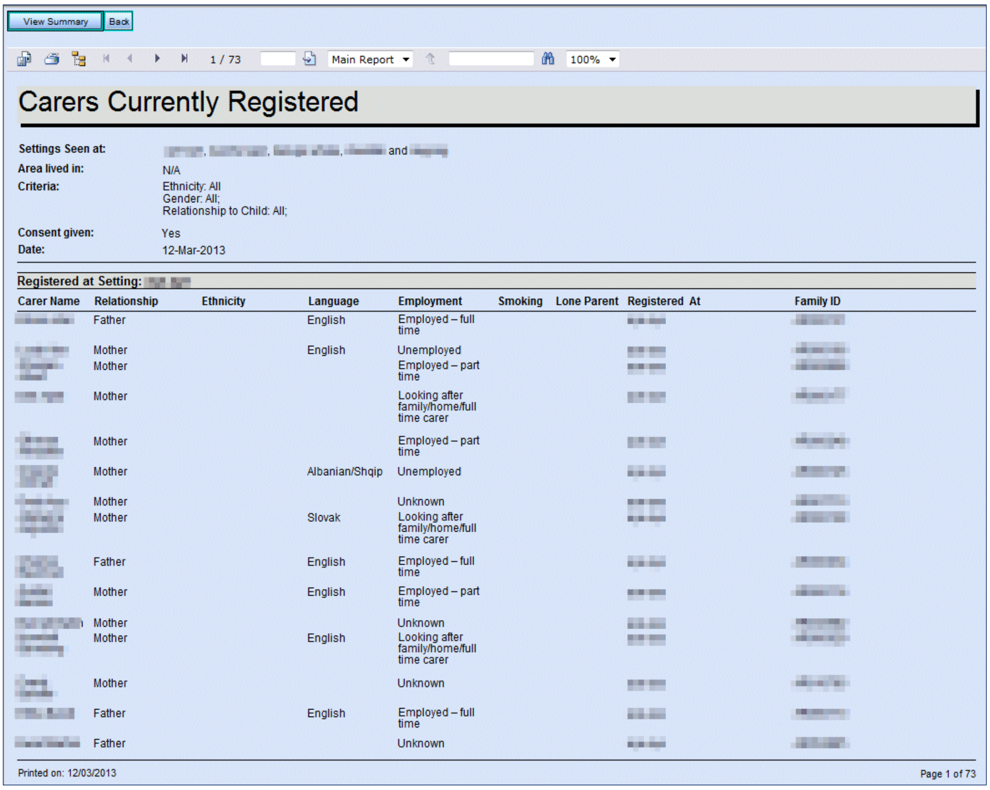


Figure 212 Reports Summary screen

The report criteria are listed, followed by the results.

- Click the **View Summary** button to display the report summary pages. Click the **View Details** button on the summary to return to the main report. See *Summary* on page *133*.
- Use the toolbar to navigate the results, export or print the report or edit the display properties. See Report Toolbar on page *133*.
- Click the **Back** button to return to the criteria selection screen.
- Click a line in the report to display just that line or information group.

Export to Excel

- To export the report as a .csv file:
  a. Click the **Export to Excel** button.
  b. Select whether to open or save the .csv file.
- To export the report as an Excel spread sheet (.xls file) instead of as a .csv file:
  a. Click the **Run** button to generate the report.

b. Click the **Export** button in the report toolbar to display the **Export Options** window.

c. Select one of the Excel options from the **Export Format** dropdown. See Exporting a Report on page *134*.

Summary

If the Summary check box is not selected in the report criteria, then:

- When the **Run** button is clicked, the **Summary** section is automatically included at the end of every report.
- When the **Export to Excel** button is clicked, the **Summary** section is not included in the .csv file.

If the **Summary** check box is selected in the report criteria, then:

- When the **Run** button is clicked, the **Summary** section of the report only is generated and displayed.
- When the **Export to Excel** button is clicked, the **Summary** section of the report only is output in the .csv file.

Report Toolbar

Figure 213 Reports Toolbar.

The reports toolbar enables the report data to be exported to various formats, printed and searched.

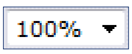
 *Export*	Click the **Export** button to export the report in a different file format (see Exporting a Report on page *134*).
 *Print*	Click the **Print** button to send the results to a printer (see Printing a Report on page *134*).
 *Show/Hide Group Tree*	Click the **Show/Hide Group Tree** button to display a group navigation menu at the left-hand side of the report.
 *Navigate*	Click an arrow button to navigate to the previous or next page, or to the first or last page.
 *Pages*	This indicates which page you are currently viewing out of the total number of pages in the report.
 *Go To*	This enables you to jump to a specific page. Enter the page number and click the **Go To** button.
 *View History*	If you have clicked a record to select it and view it in isolation, the **View History** dropdown lists all the records you have viewed. Select a record from the list to view it or select **Main Report** to return to the complete report.
 *Up*	If you have selected an individual record to view, you can click the **Up** button to move to the previous record. The records viewed in this way are added to the list in **View History**.
 *Find*	Enter some text in the field and click the **Find** button to carry out a text search on the report data.
 *Zoom*	Select a different percentage to zoom in or out of the report view.

Figure 214 Report toolbar icons

Exporting a Report

1. Click the **Export** button.

   The **Export Options** window is displayed.

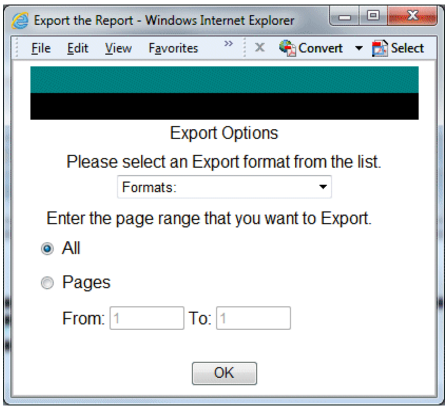


Figure 215 Report Export Options window

2. Select the export format from the dropdown list. The following formats are available:
   - Report (rpt)
   - Acrobat (pdf)
   - MS Word (doc)
   - MS Excel 97-2000 (xls)
   - MS Excel 97-2000 (data only). Only data is extracted, formatting is dropped (xls)
   - Rich Text Format (rtf)
3. Click the **OK** button.
4. Click **Open**, **Save** or **Save as**, as appropriate.

Printing a Report

1. Click the Print button.

   The **Print Options** window is displayed.

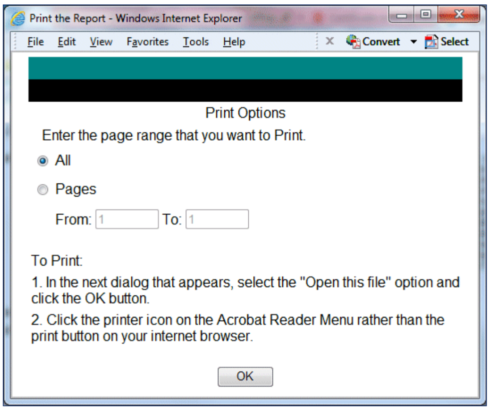


Figure 216 Print Report window

2. Enter the page range that you wish to print.
3. Click the **OK** button.
4. If necessary, select **Open this File** and click the **OK** button.

The report is displayed in Acrobat Reader.

5. Click the **Print** button in Acrobat Reader to print the report.

Standard Reports

Children Reports

Report Name	Report Output
Children Seen (reach)	Children seen between dates (no event details)
Children Seen (volume)	Children seen between dates (with event details)
Children Seen, by Age (reach)	Children seen between dates, grouped by age range (no event details)
Children Seen, by Age (volume)	Children seen between dates, grouped by age range (with event details)
Children Seen, by Activity (reach)	Children seen between dates, grouped by activities (no event details)
Children Seen, by Activity (volume)	Children seen between dates, grouped by activities (with event details)
Children Seen, by Activity, with Anonymous	Children seen between dates, grouped by setting and events. The total number of anonymous children attending each event is also shown. Both active and inactive children are included.
Children now Registered	Children currently registered, only includes active members
Children now Registered, by Ethnicity	Children currently registered, grouped by ethnicity (active members only)
Children now Registered, by Disability and Special Needs	Registered, active children with a disability or special needs
Births of Children	Birth dates, weights and names of children born within the date range
Births of Children by Weight	Births of children grouped by weight, born between date range.

Carer Reports

Report Name	Report Output
Carers Seen (reach)	Carers seen between dates (no event details)
Carers Seen (volume)	Carers seen between dates (with event details)
Carers Seen, by Activity (reach)	Carers seen between dates grouped by activities (no event details)
Carers seen, by Activity (volume)	Carers seen between dates grouped by activities (with event details)
Carers Seen, by Activity, with Anonymous	Active and inactive carers seen between dates, grouped by settings and events. Numbers of anonymous carers attending are displayed.
Carers now Registered	Carers currently registered. Includes active members only.

Family Reports

Report Name	Report Output
Families Seen (reach)	Families seen within the date range. No details about events.
Families Seen (volume)	Families seen (volume) between dates without details about events.
Families now Registered	Families currently registered (active families only).
Mail Merge Families Registered	Mail merge families registered.
Monthly Summary Members Seen (reach)	Monthly summary of carers and children seen, grouped by activity (counting each member once per activity).
Monthly Summary Members Seen (volume)	Monthly summary of carers and children seen, grouped by activity (counting each attendance at the activity).
Summary of Members Seen (reach)	Summary of families, carers and children seen, grouped by activity (counting each family, carer and child once for each activity).
Summary of Members Seen (volume)	Summary of families, carers and children seen, grouped by activity (counting each attendance).

Registration Reports

Report Name	Report Output
Carers Joining	Carers who joined within the date range (active and non-active carers are included).
Children Joining	Children who joined within the date range (active and non-active children are included) and who have a date of birth recorded.
Carers and Children Joining	Carers and children who joined within the date range (active and non-active members are included).
Families Joining	Families who joined within the date range (active and non-active families are included).

Event Reports

Report Name	Report Output
Events Outcome	The outcomes of events occurring within the date range.
Events (Reach)	Members who attended events within the date range (no details about individual events).
Events (Reach) by Ethnicity	Members who attended events within the date range, grouped by ethnicity (no details about individual events).
Events (Reach) by Activity	Members who attended events within the date range, grouped by activity (no details about individual events).
Events (Volume)	Members who attended events within the date range (includes details about individual events).
Events(Volume) by Activity	Members who attended events within the date range, grouped by activity (includes details about individual events).
Events by Activity with Anonymous	Members seen within the date range, grouped by setting and events. The total number of anonymous members attending each activity is also displayed. Active and inactive members are included.
Members Seen by Ethnicity	Ethnic group reach and volume totals, including percentages, by setting and area. Active and inactive members are included.

Report Name	Report Output
Provider with Events (Basic)	Reach totals for members and families for events, by setting and provider. Active and inactive members are included.
Provider with Events (Detailed)	Reach totals for members and families for events, grouped by setting, provider and family. Active and inactive members are included.
Members Seen by Provider	Reach, volume and anonymous volume totals, including totals for family breakdown, ethnicity, disabilities, teenage parents, lone parents, setting and children age range. Both active and inactive members are included.
Members Seen by Provider and Setting	Reach and volume totals including totals for children seen, carers seen, families seen, fathers seen, parents with disabilities, children with disabilities, lone parents, teenage parents and ethnic minorities by setting. Both active and inactive members are included.

Non Attendance Reports

Report Name	Report Output
Children not Seen	Children not seen within the date range (active children only).
Carers not seen	Carers not seen within the date range (active carers only).
Appointments Missed	Members and the events they have missed, by setting and between dates. Active and inactive members are included.
Mothers not Seen	Mothers not seen during the first two months following a birth (for births that took place within the date range).
Children Who No Longer Attend Their Registered/ Affiliated Setting	This report displays children not seen within the date range (active children only) at the settings to which they are registered or affiliated. Children who have attended an event are not included.
Carers who no Longer Attend their Registered/ Affiliated Setting	This report displays carers not seen between dates (active carers only) at the settings to which they are registered or affiliated. If they have not attended an event, then the carer is included in the report. If they have attended an event, then the carer is not included in the report.

Pregnancy and Birth Reports

Report Name	Report Output
Pregnant Teenager Now Registered	This report displays pregnant teenagers registered at a setting (active teenagers only).
Pregnant Women Seen (Reached)	This report displays pregnant women seen within the date range (details about events are not included). Active and inactive women are included.
Births of Children	This report displays birthdays, weights and names of children born within the date range.
Births of Children by Weight	This report displays the births of children grouped by weight, born within the date range.

Breast Feeding Reports

Report Name	Report Output
Records of Breast Feeding	This report displays the breast feeding records of children in their first year (it includes all children born within the date range who have an active mother).

Health Reports

Report Name	Report Output
Smoking Records	This report displays the smoking records of carers (including those members who are active and who have smoked).
Births of Children by Weight	This report displays the birth dates, weights and names of children born within the date range.

Care Worker Reports

Report Name	Report Output
Care Workers and Events Summary(Reach)	This report displays the number of different members who visited each care worker within the date range.
Care Workers and Events Summary(Volume)	This report displays the number of visits that each care worker has made within the date range.
Care Workers and Events(Reach)	This report displays the care workers and members attending events within the date range (does not include details of events).
Care Workers and Events(volume)	This report displays care workers, their events and members attending between dates (includes details about events).
Care Workers and Hours worked at Events	This report displays the length of time in hours and minutes that care workers have worked at events

Development Plan Reports

Report Name	Report Output
Dev Plans & Due Dates	This report displays the development plan milestones and whether the target dates have been met, including late reasons. The report contains two summary tables.
Care Workers Working with Dev Plan Targets	This report displays the development plan milestones and their due dates handled by care workers.

Sure Start Reports

Report Name	Report Output
M3 (Registered at requested Settings)	This displays the Sure Start monthly government report giving data on children, pregnant women and babies who are registered at requested settings.
M3 (Seen at requested Settings)	This displays the Sure Start monthly government report giving data on children and pregnant women who are seen at requested settings.
M7	This displays the Sure Start yearly government report giving statistics on key targets.
NCH Section 1	This reports on individuals seen at selected sites.
NCH Section 2	This reports on Families and Referrals

Custom Fields

Report Name	Report Output
Custom Reports	This report displays custom fields (or labels) with members.

Hard To Reach Reports

Report Name	Report Output
Hard To Reach Reports	This report displays **Hard to Reach** fields (or labels) with members.

Events by Aims Reports

Report Name	Report Output
Event Type	This report displays the event group and description by setting, grouped by the event aim. Active and inactive members are included.
Children Reach	This report displays children reached by event aim and setting. Active and inactive members are included.
Children Volume	This report displays children volumes by event aim and setting. Active and inactive members are included.

Audit Log Reports

Report Name	Report Output
Audit Log	This report displays the records audited by users through the family screen and lists attempts to access family IDs. Only **Console Managers** can run this report.

Annual Profiles

Annual profile reports are based on the same data as the equivalent quarterly profile reports, but return results for a selected **year type** (calendar, financial or academic) against the calculated previous year.

Report Name	Report Output
Profile Main	Shows high level reach and volume **Members Seen** totals and **Event** totals, for a number of measures, presented in a table.
Profile Outcomes	Shows high level reach and volume **Members Seen** totals and **Event** totals by **Outcome Types** and **Individual Outcomes**, presented in a table.
Profile Themes	Shows high level reach and volume **Members Seen** totals and **Event** totals by themes, presented in a table.
Profile Access Groups	Shows high level reach and volume **Members Seen** totals and **Event** totals by access groups, presented in a table.
Profile Groups	Shows high level reach and volume **Members Seen** totals and **Event** totals by group, presented in a table.

Quarterly Profiles

Quarterly profile reports are based on the same data as the equivalent annual profile reports, but return results for a selected **quarter** against the calculated previous quarter of the same year and the corresponding quarter in the previous year.

Report Name	Report Output
Profile Main	Shows high level reach and volume **Members Seen** totals and **Event** totals, for a number of measures, presented in a table.
Profile Outcomes	Shows high level reach and volume **Members Seen** totals and **Event** totals by **Outcome Types** and **Individual Outcomes**, presented in a table.

Report Name	Report Output
Profile Themes	Shows high level reach and volume **Members Seen** totals and **Event** totals by themes, presented in a table.
Profile Access Groups	Shows high level reach and volume **Members Seen** totals and **Event** totals by access groups, presented in a table.
Profile Groups	Shows high level reach and volume **Members Seen** totals and **Event** totals by group, presented in a table.

Custom Queries

Queries are pre-defined simple reports. They are SQL queries that enable you to view the data in report format. Some standard queries are included with eStart releases. See Standard Queries on page *140*.

Queries can be created by Capita One on request. These are called custom queries.

Ordinary users with **Custom Query Run** permissions can run custom queries via **Reports | Custom Query**.

Users with appropriate administrator permissions can also run reports via **Admin | Custom Query** and can also:

- View and amend the details of existing custom queries, including:
  - **Name** and **Description**
  - **Active** status
  - **Query Content** (SQL)
- Import custom queries from the repository and amend them, or remove existing custom queries. See *Custom Query Repository* on page *140*.
- Assign run permissions for users or user groups to a custom query (users will only be able to view and run custom queries if they have been granted access to them).

See the *Custom Queries* chapter in the *eStart Web Administrator Handbook* for more information about managing custom queries.

Custom Query Repository

Hosted customers with the appropriate permission levels (administrators) can view a list of existing custom queries. These have been produced by Capita, based on customer requests.

- The details of these custom queries can be viewed, and any of interest can be imported and run.
- User and group permissions can be set for any imported custom queries.
- If an imported custom query is not wanted, it can be deleted from the list but remains in the repository to be viewed and imported.

See the *eStart Web Administrator Handbook* for more details.

Standard Queries

The standard queries are simple reports that enable Local Authorities to extract information for the purposes of **Payment By Results**. Reports are available for **In Greatest Need, Two Year Old Entitlement** and **Target Evidence Based Events**. These queries are available via **Reports | Custom Queries** and **Admin | Custom Queries**.

In Greatest Need

The following custom queries support the **In Greatest Need** (IGN) measure:

1. PBR - Families in Greatest Need - By Registered Setting
2. PBR - Families in Greatest Need - By All Settings

These custom queries display all families that are in greatest need within the date range specified by the user. The following information is returned:

- **Family ID**
- **Family Status**: active or inactive
- **Registered Setting**: if the **By All Settings** option is chosen
- **Start Date**: IGN start date
- **End Date**: IGN end date
- **Created By**: the user who added the IGN information
- **Reason**: IGN reasons
- **Notes**: IGN notes.

3. PBR - Families in Greatest Need (Family Details) - By Registered Setting
4. PBR - Families in Greatest Need (Family Details) - By All Settings

These custom queries display all families that are in greatest need within the date range specified by the user. The following information is returned:

- **Family ID**
- **Family Status**: active or inactive
- **Registered Setting**: if the **By All Settings** option is chosen
- **Member ID**
- **Member Name**: first name and surname
- **Member Type**
- **DOB**: the member's date of birth.

> ***NOTE:*** *If there is more than one carer in a family and one of them is flagged as a lone carer, the lone parent column in the report will be flagged for all the children linked to the family. This is because the report cannot differentiate relationships between household members sharing the same family ID if there is a carer flagged as a lone parent.*

Two Year Old Entitlement

The following custom queries support the **Two Year Old Entitlement** (TYOE) measure:

1. PBR - Two Year Old Entitlement - By Registered Setting
2. PBR - Two Year Old Entitlement - By All Settings

These custom queries display all children that have a current Two Year Old Entitlement within the date range specified by the user. The following information is returned:

- **Child ID**: member ID
- **Family ID**
- **Registered Setting**: if the **By All Settings** option is chosen

- **Family Status**: active or inactive
- **Child Status**: active or inactive
- **Start Date**: the child's TYOE start date
- **End Date**: the child's TYOE end date
- **Created By**: the user who added the TYOE information
- **Reason / Type**: the TYOE reasons
- **Childcare Provider**: the TYOE childcare providers
- **Notes**: the **Two Year Old Entitlement** notes.

3. PBR - Children who have taken up Two Year Old Entitlement - By Registered Setting
4. PBR - Children who have taken up Two Year Old Entitlement - By All Settings

   These custom queries display all children that have a current two year old entitlement within the date range specified by the user. The following information is returned:

- **Child ID**: member ID
- **Family ID**
- **Registered Setting**: if the **By All Settings** option is chosen
- **Family Status**: active or inactive
- **Child Status**: active or inactive
- **DOB**: date of birth
- **Age**: calculated by subtracting the custom query run date from the child's date of birth
- **Disability**: this column displays **Yes** if the member has any disabilities recorded, or **No** if not
- **Ethnicity**: the member's ethnicity (if recorded)
- **LSOA**: this column displays the **Lower Super Output Area** of the member's alternative postcode. If the member's alternative postcode is blank then the LSOA of the family's postcode is used.

Target Evidence Based Events

The following custom queries support the **Target Evidence Based Event** (TEBE) measure:

1. PBR - Target Evidence Based Parental Programme Events - By Event dates and Setting Seen

   This custom query displays all events that have a **Target Evidence Based Event** value recorded within the date range specified by the user. The following information is returned:

- **Event Name**
- **Hidden**: this column displays **Yes** if the event is hidden, or **No** if not
- **Target Area**: this column displays the values chosen by the user using the Target Evidence Based Event field
- **Date of Event**
- **Location**
- **Number of Attendees**
- **Number of Registrants**.

2. PBR - Target Evidence Based Parental Programme Events - By Event dates

This custom query displays all events that have a **Target Evidence Based Event** value recorded within the date range specified by the user. The following information is returned:

- **Event Name**
- **Setting Seen At**
- **Hidden**: this column displays **Yes** if the event is hidden, or **No** if not
- **Target Area**: this column displays the values chosen by the user using the **Target Evidence Based Event** field
- **Date of Event**
- **Location**
- **Number of Attendees**
- **Number of Registrants**.

Workless Households

The following custom queries support the **Workless Households** measure:

1. Workless Households – Family Details – By Date Range – By All Registered Settings
2. Workless Households – Family Details – By Date Range – By Registered Setting

These custom queries return the following information:

- **Family ID**
- **Family Status**: **Active**, **Inactive** or **Not Selected**. **Not Selected** indicates that a family does not have a status saved in the database. All families with a **Not Selected** status can be identified and updated via **Admin | System Maintenance | Family | No Status**.
- **Registered Setting**: The main setting that the family is registered to. This does not return any families that are affiliated to the setting selected in the **By Registered Setting** custom query.
- **Member ID**
- **Member Name**
- **Member Type**
- **Date of Birth** (if recorded)
- **Ethnicity**: Family member's **Main Ethnicity** (if recorded)
- **Benefits**: Lists all benefits recorded for each individual member
- **Lone Parent**: This column displays **Yes** if the member has the **Lone Parent** check box on their **Carer Details** page selected, and **No** if the check box is deselected
- **Teenage Carer**: This column displays **Yes** if the member is a carer and their age is within the range of ≥13 to <20, and **No** if they are not a carer whose age is within this range
- **Disability**: Lists all current disabilities recorded for each individual member
- **LSOA**: This column displays the **Lower Super Output Area** of the member's **Alternative Postcode**. If the member's alternative postcode is blank, then the LSOA from the family's postcode is used instead.

3. Workless Households – Family Summary – By Date Range – By All Registered Settings
4. Workless Households – Family Summary – By Date Range – By Registered Setting

These custom queries return the following information:

- **Family ID**
- **Family Status**: **Active**, **Inactive** or **Not Selected**. **Not Selected** indicates that a family does not have a status saved in the database. Families with a **Not Selected** status can be identified and updated through the **Admin | System Maintenance | Family | No Status** tool.
- **Registered Setting**: The main setting that the family is registered to. This does not retrieve any families that are affiliated to the setting selected within the **By Registered Setting** custom query.
- **Workless household Start Date**
- **Workless household End Date**
- **Reason**: The reasons selected for the workless household record
- **Notes**: Any additional notes recorded against the workless household record
- **Created by**: The user who created the workless household record.

Flexible Reports

Introduction

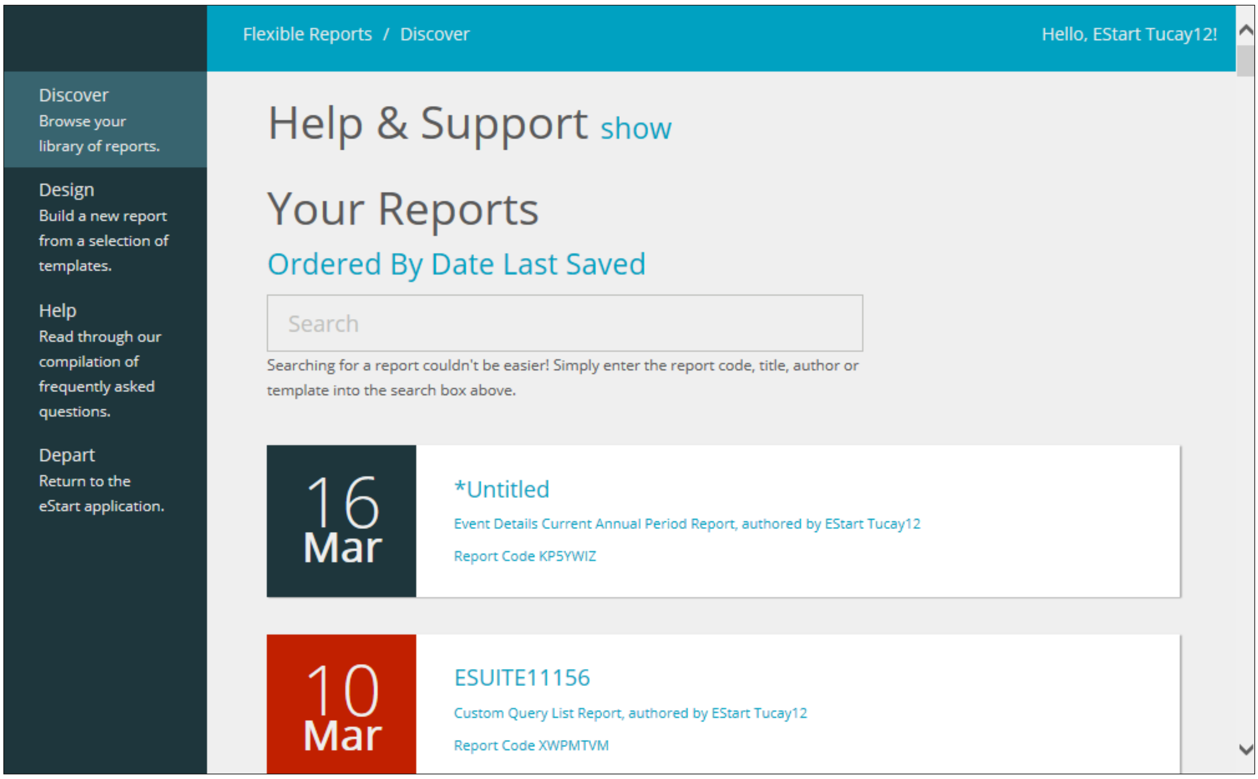
Flexible reports enable you to select data from within eStart and then export it as a CSV file.

Flexible reports are based on pre-defined templates. These cover a wide range of criteria pertinent to the specified areas, e.g., members seen or event details. If all the information included in the selected template is not required, the unnecessary columns can be hidden. Additionally, search criteria (filters) can be saved as part of the report so that when the report is run, only records that meet the specified criteria are included. For example, you might require a report that returns the event details for 3 year olds which occurred at a specific setting in the last year. In this example, you could select the **Event Details Current Annual Period** report template then add a filter to the **Setting Seen** and **Age** columns. When the report is run, only events for 3 year olds with the specified setting name in the **Filter** are returned.

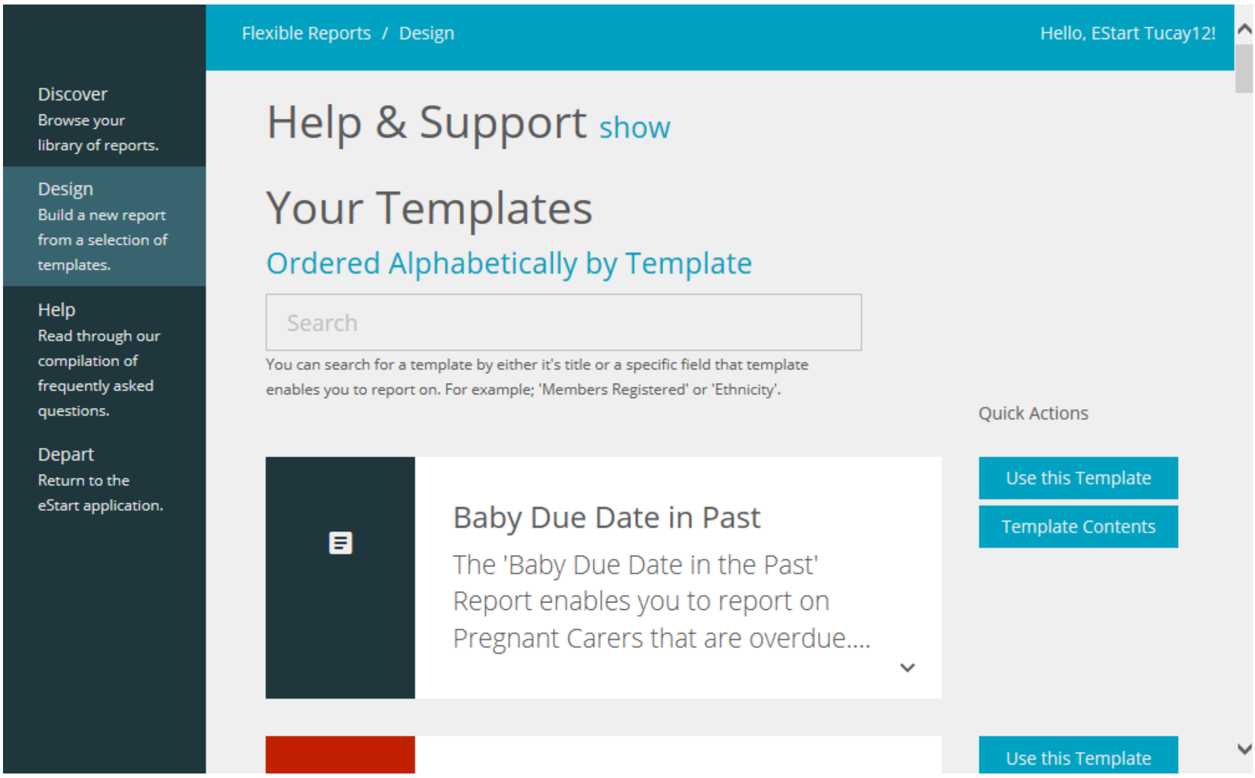
Access to a report is controlled by permissions. By default, the only people who can view a report are administrators and the user who created the report. Additional users or groups of users can be granted access to the reports by the report creator or an administrator.

Creating a new flexible report

1. Select **Flexible Reports** from the **Welcome to eStart – Main Menu** or **Reports | Flexible Reports** from the left-hand side navigation to display the **Flexible Reports | Discover** page.



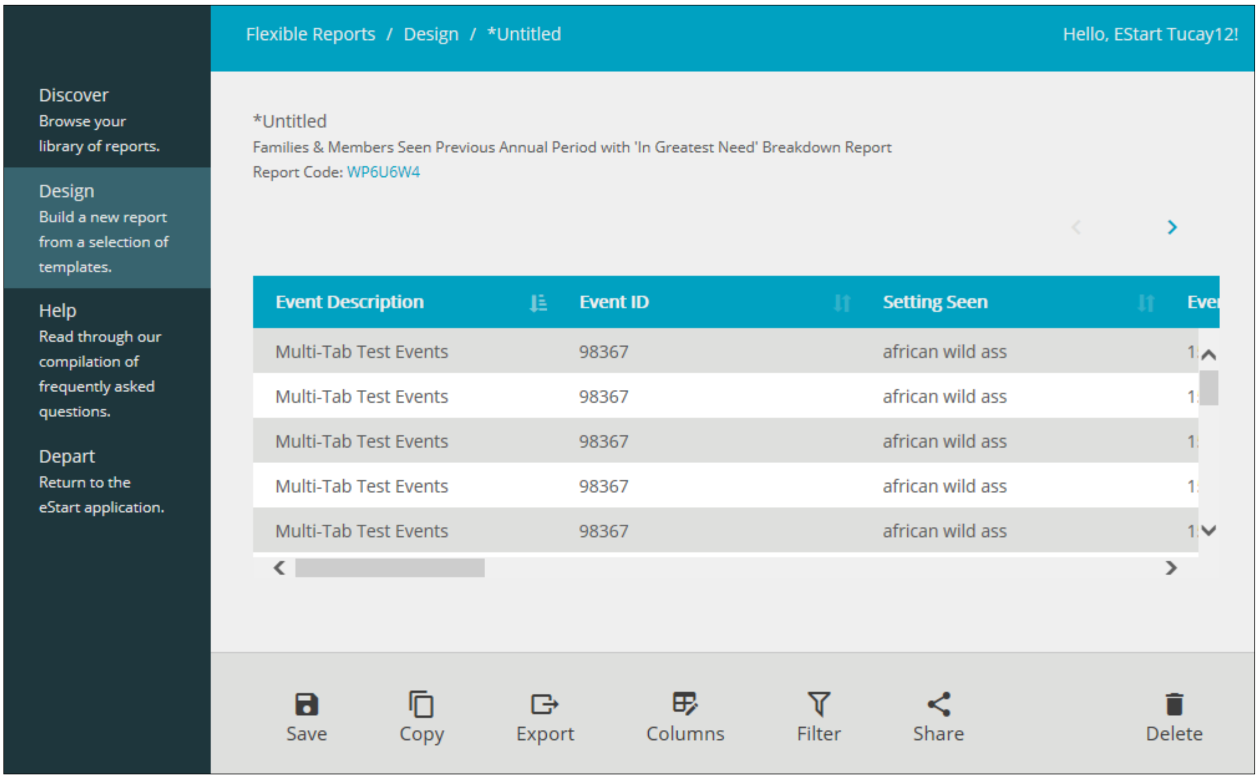
2. From the left-hand side navigation, select the **Design** tab to display the **Flexible Reports | Design** page. A list of the available templates is displayed.



3. Locate the template you want to use in the list, or, if known, enter the template name or the name of any field contained in the template into the **Search** field.

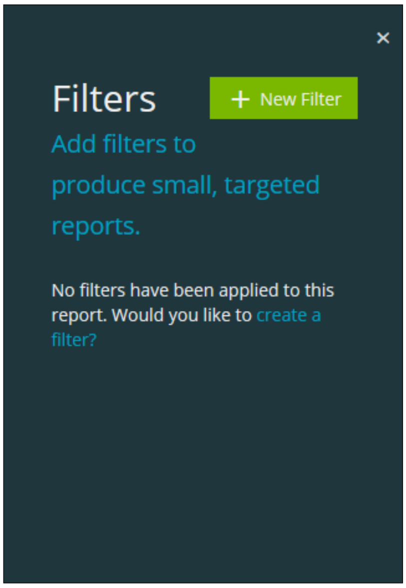
   You can click the **Template Contents** button adjacent to a template to display the fields included in the template.

4. After locating the required template, click the **Use this Template** button to display the **Flexible Reports | Design | Untitled** page.

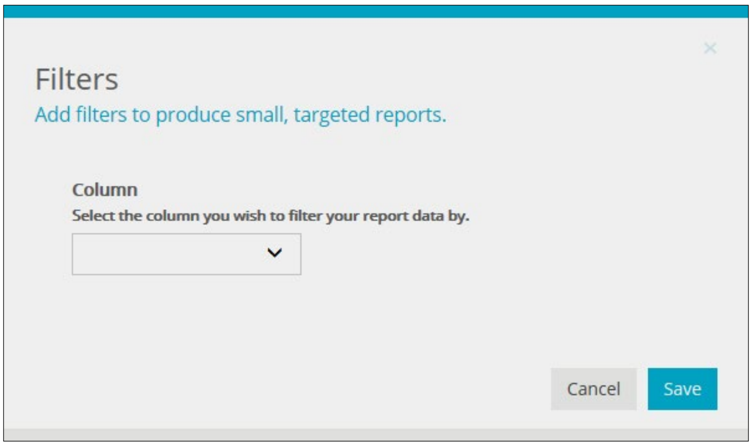


5. To refine the information included in the report, add a filter to a column:

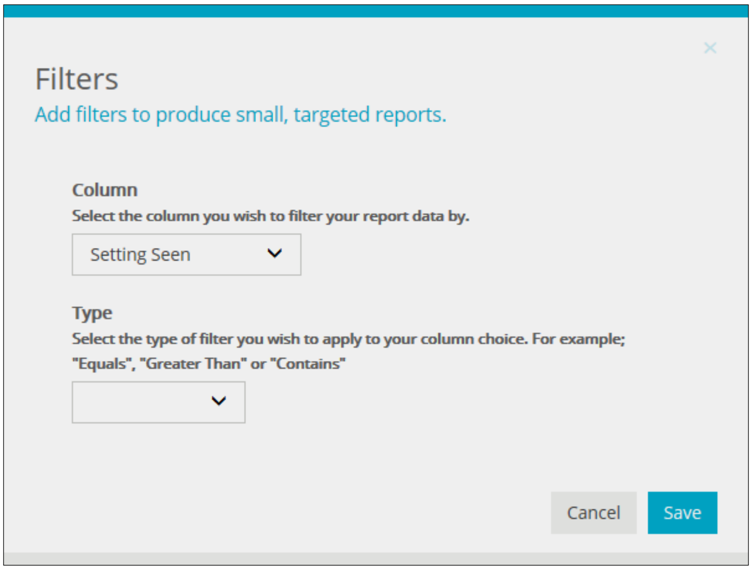
   a. Click the **Filter** button to display the **Filters** overlay.



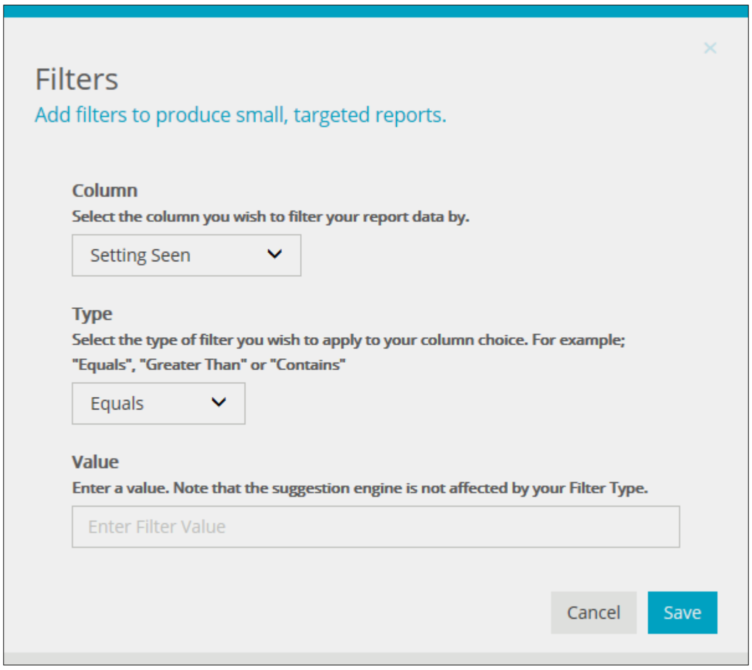
   b. Click the **New Filter** button to display the **Filters** dialog.



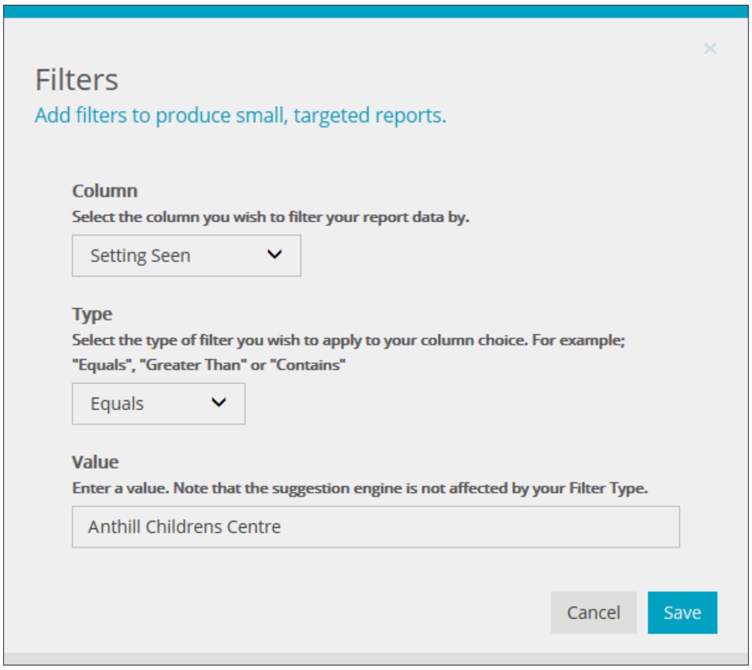
c. Select the **Column** to which you want add the filter. In this example, we are adding the filter to the **Setting Seen** column.



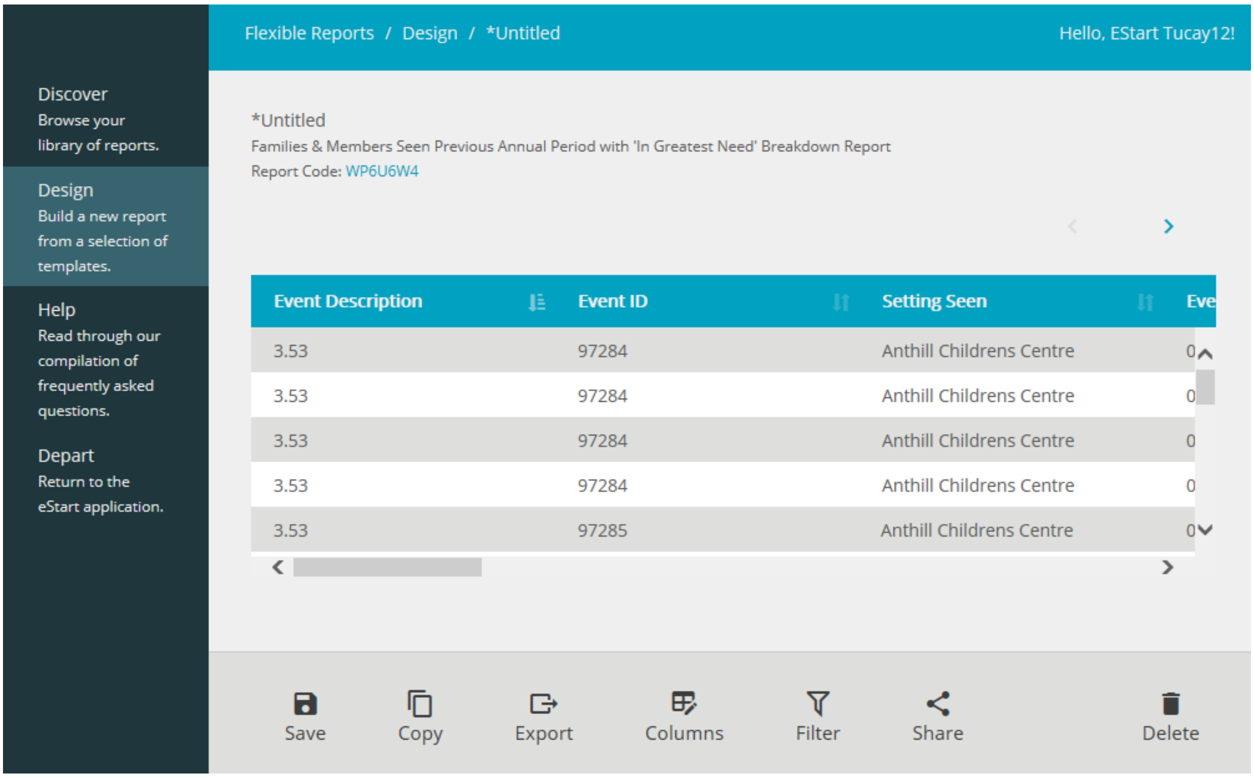
d. Select the **Type** of filter you want to apply to the column.



e. Enter the criteria on which you want the filter to be based into the **Value** field. The options are different depending on the selected **Type**.

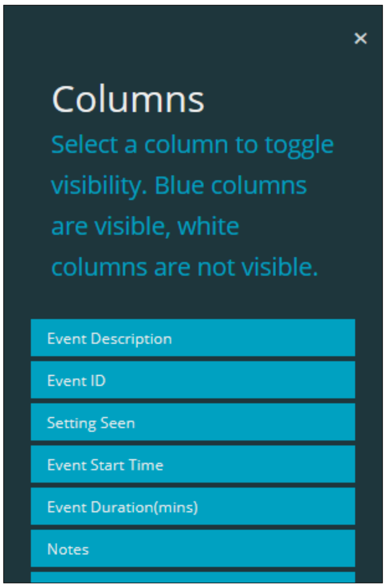


f. Click the **Save** button to apply the filter and close the dialog. In this example, only results containing **Anthill Children's Centre** as the **Setting Seen** will be included in the results.



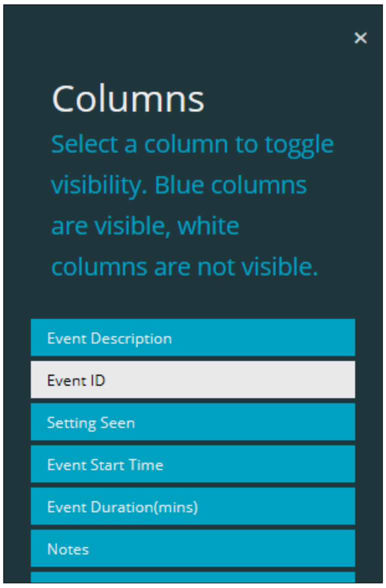
6. If required, you can edit the visibility of columns:

a. Click the **Columns** button to display the **Columns** overlay.

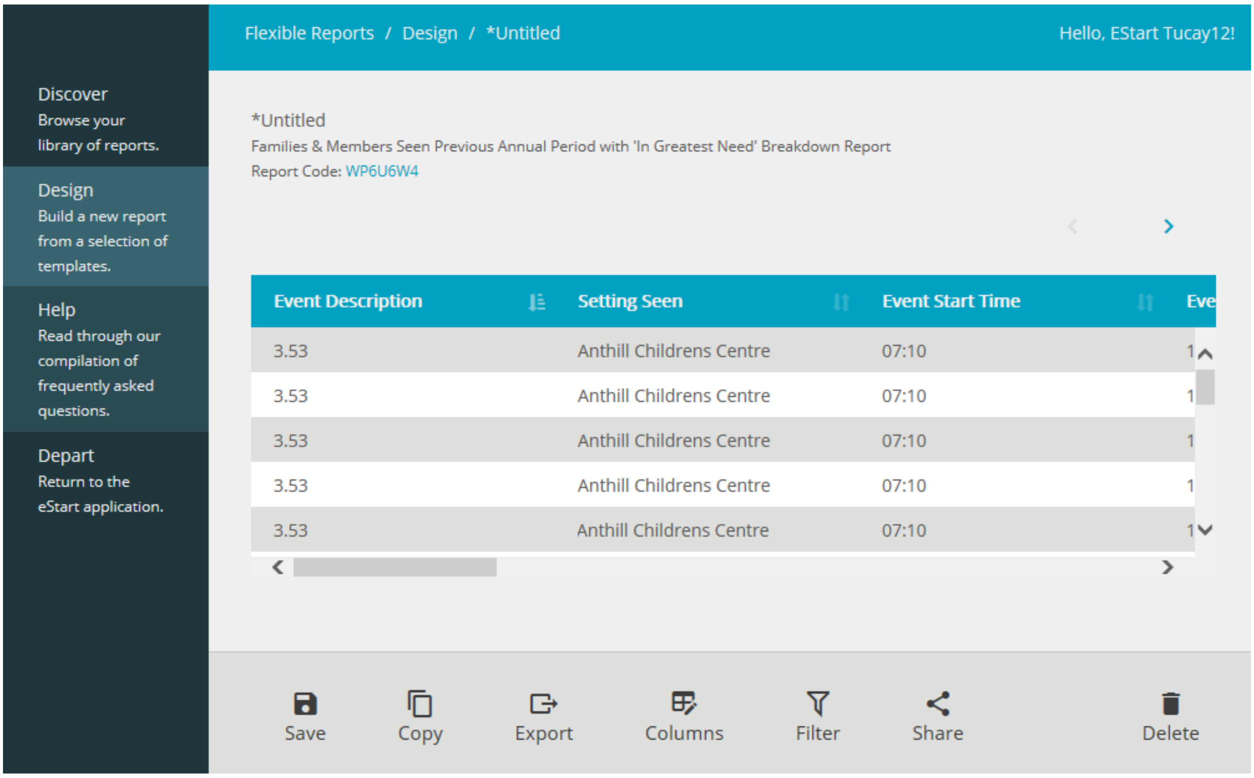


b. To hide a column, click the column name. A hidden column is white.

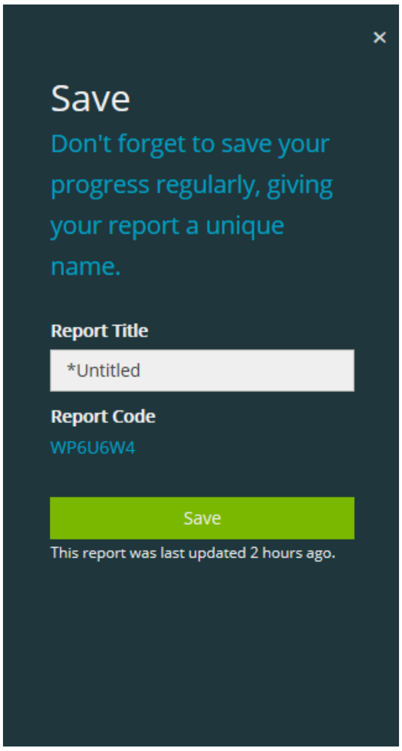
c. To unhide a column, click the column name. Visible columns are blue.



d. Click the **X** button to close the overlay. In this example, all the columns included in the template are displayed except for the **Event ID**.



7. After you have added the required filters and adjusted column visibility, click the **Save** button to display the **Save** overlay.



8. Enter a **Report Title** then click the **Save** button.

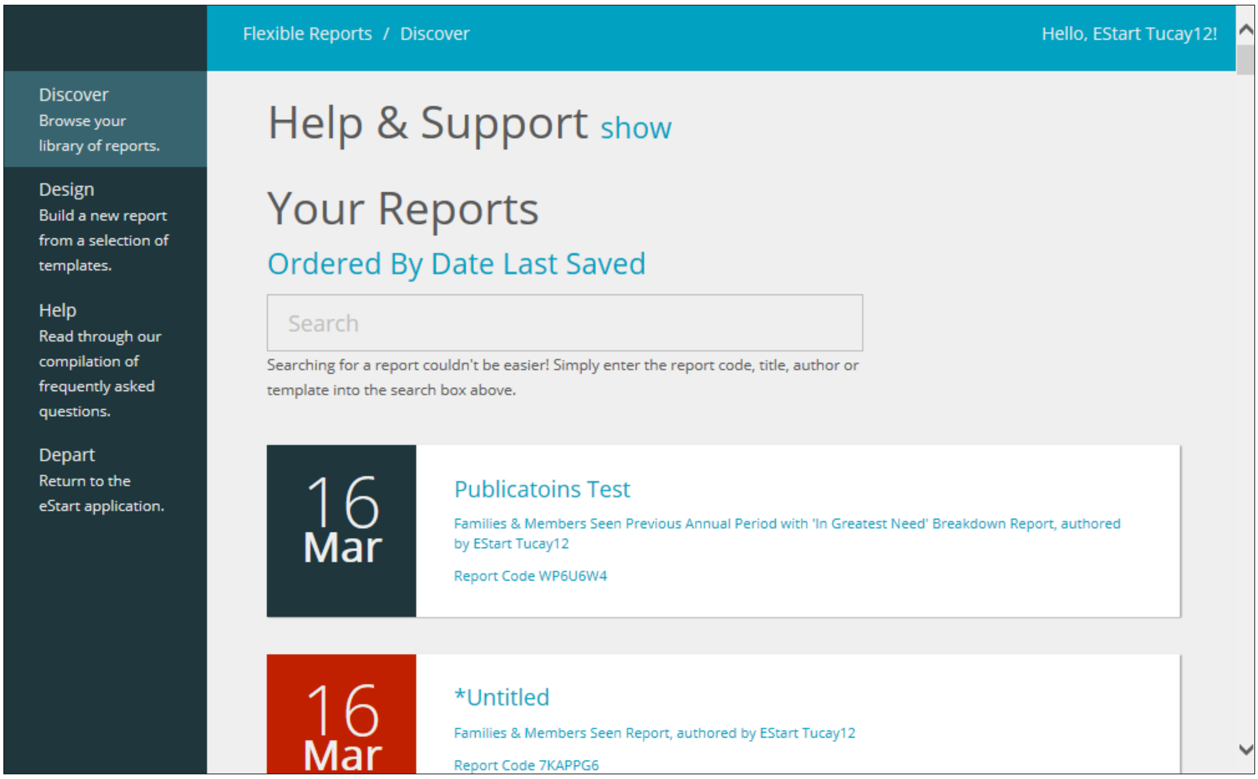
   To return to the report, click the **X** button at the top of the overlay.

Viewing a flexible report

Users with read access to a flexible report can view the report details. Users with write access can also edit the report.

To view an existing flexible report:

1. Select **Flexible Reports** from the **Welcome to eStart – Main Menu** or **Reports | Flexible Reports** from the left-hand side navigation to display the **Flexible Reports | Discover** page.



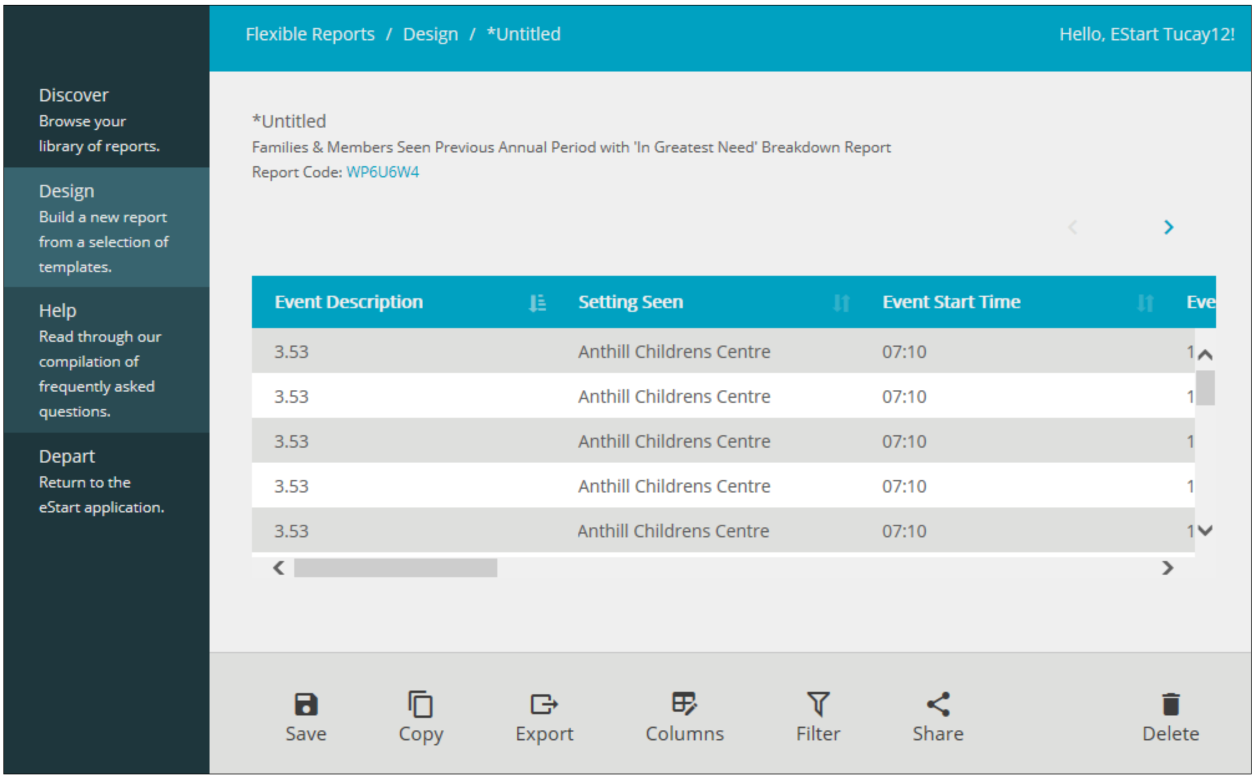
2. Select the report you want to view from the list or enter search criteria in the **Search** field to filter the list.

Assigning permissions to a flexible report

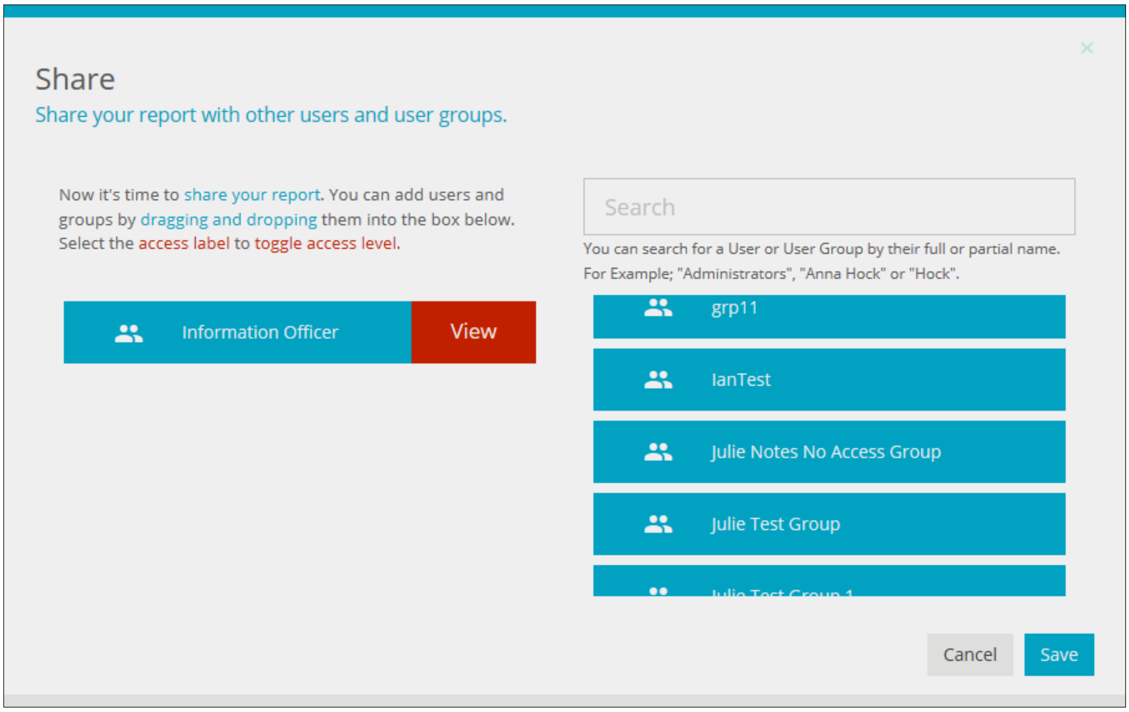
By default, the user who created a flexible report can view and edit the report, as can an administrator. The creator of a report or an administrator can also grant view and edit access to the report to other users.

To grant view or edit access to other users:

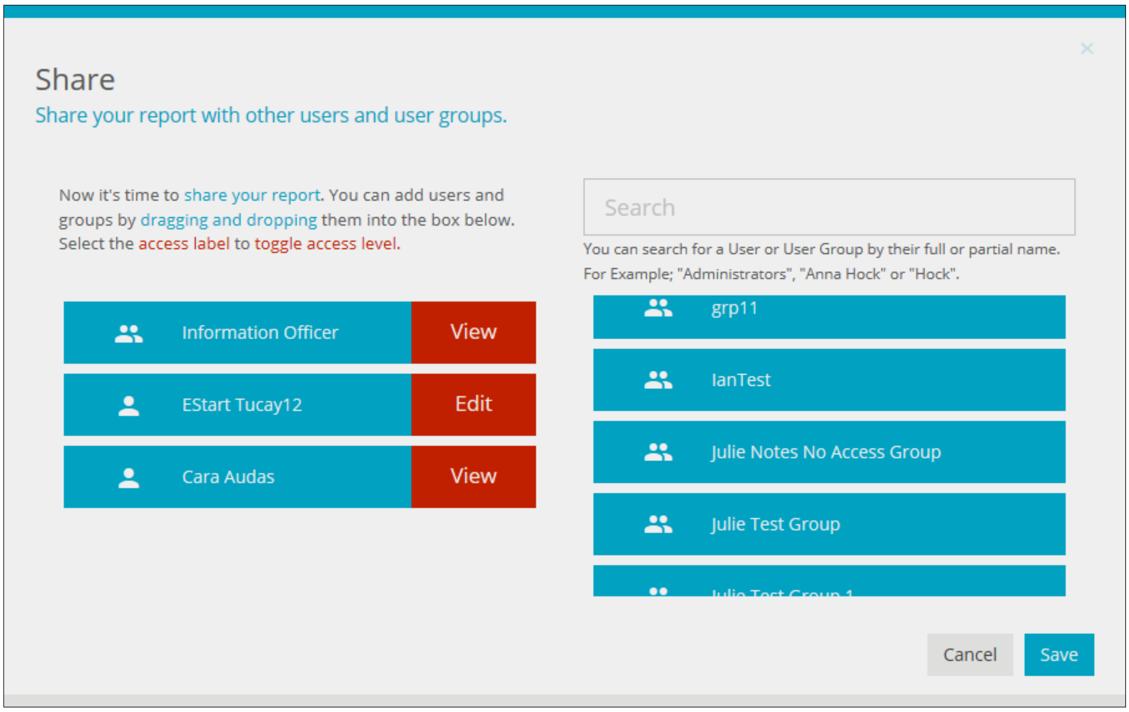
1. Open the report to which you want to grant other users access. For more information, see Viewing a flexible report on page *151*.



2. Click the **Share** button to display the **Share** dialog. The users and groups who already have read or edit access to the report are displayed in the left-hand list.



3. To enable a user or group to access the report, drag them from the right-hand column into the left-hand column. By default, any user or group added to the left-hand list is assigned view permissions.



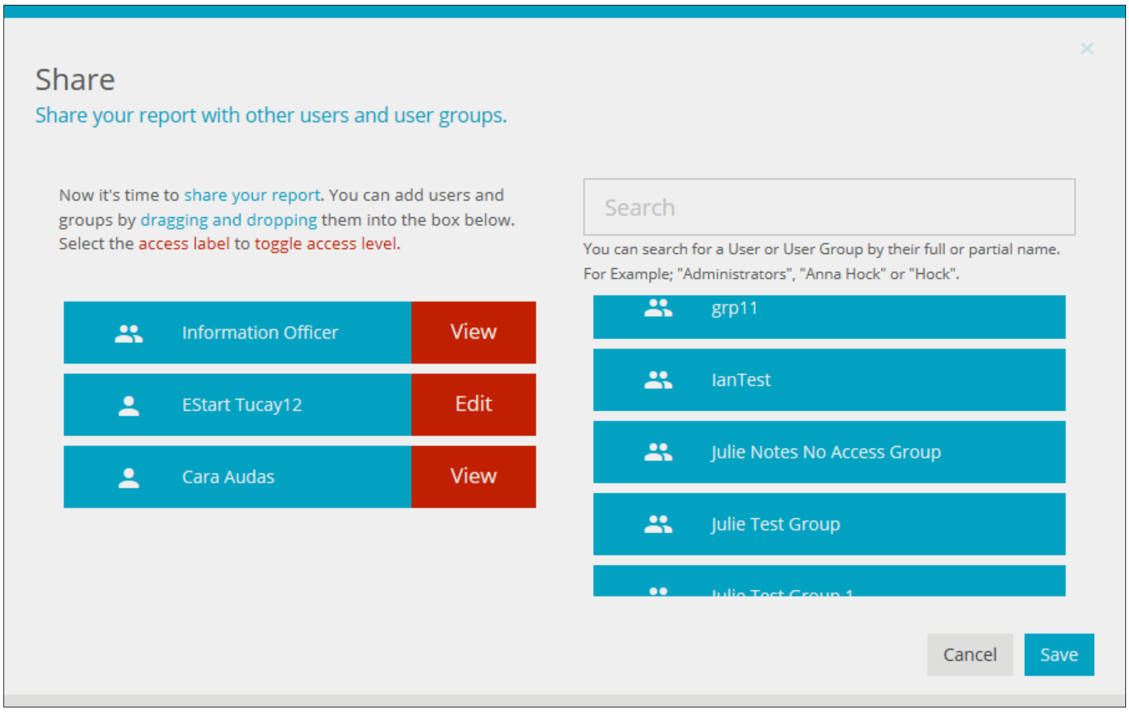
4. To alter the level of access for a user or group, click the red buttons to toggle the access level between **View** and **Edit**.
5. After assigning the required access, click the **Save** button to record the changes and close the dialog.

Removing access from a report

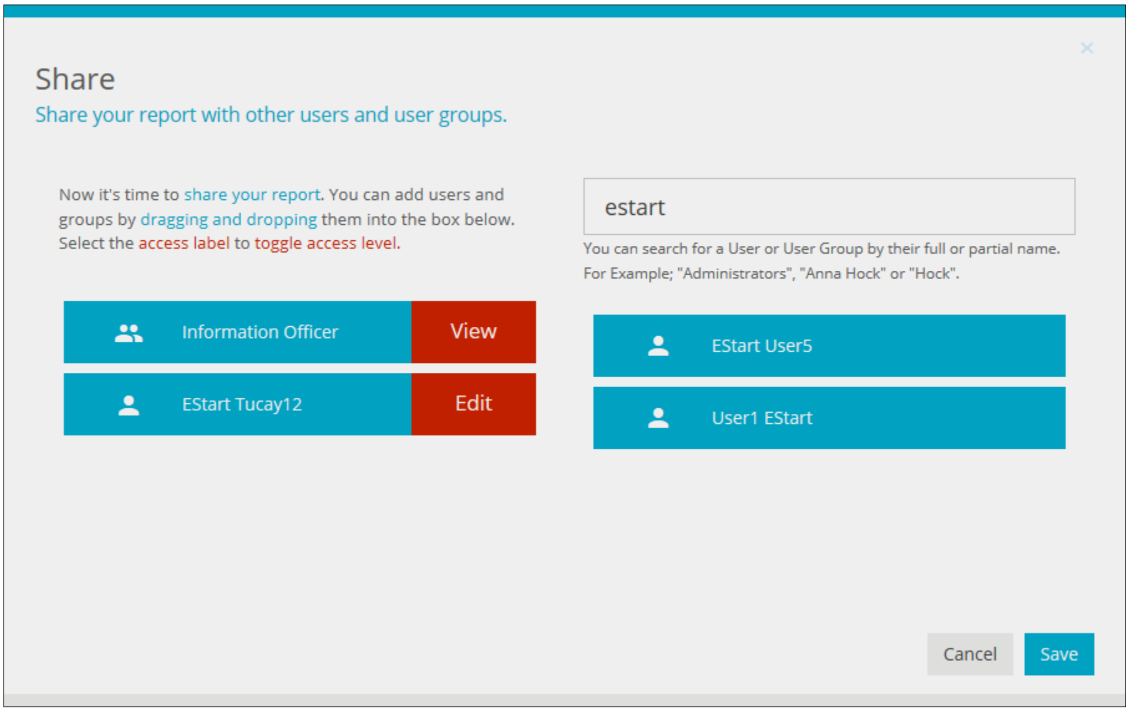
You can remove access from a report for a user or group that no longer needs to view or edit the report.

To completely remove access from a report:

1. Open the report to which you want to remove other user's access. For more information, see Viewing a flexible report on page *151*.
2. Click the **Share** button to display the **Share** dialog. The users and groups who already have read or edit access to the report are displayed in the left-hand list.



3. Drag the user or group that no longer needs access from the left-hand side list to the right-hand side list.



4. After revoking access, click the **Save** button to record the changes and close the dialog.

Editing a flexible report

If you need to adjust the parameters used in a report, you can edit them:

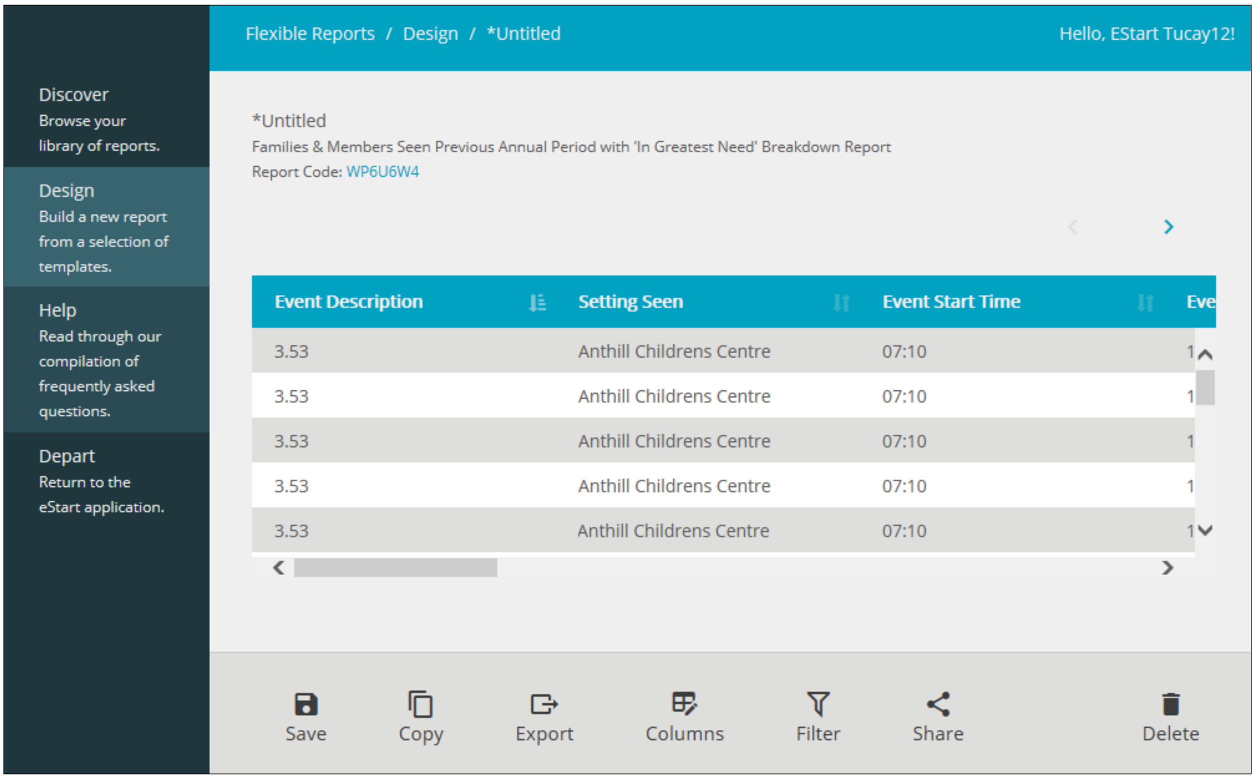
1. Open the report to which you want to grant other users access. For more information, see Viewing a flexible report on page *151*.
2. Make the required changes. For more information on editing the report parameters, see steps 5-8 of the Creating a new flexible report topic on page *144.*

Copying a flexible report

You can use an existing flexible report as the basis for a new report. To base a new report on an existing flexible report, you copy the existing report and then customise it as required.

To copy an existing flexible report:

1. Open the report you want to copy. For more information, see Viewing a flexible report on page *151*.



2. Click the **Copy** button to display a confirmation dialog.
3. Click the **Copy** button to finish copying the report. The new report name uses the original report name with “- Copy” appended to the end.

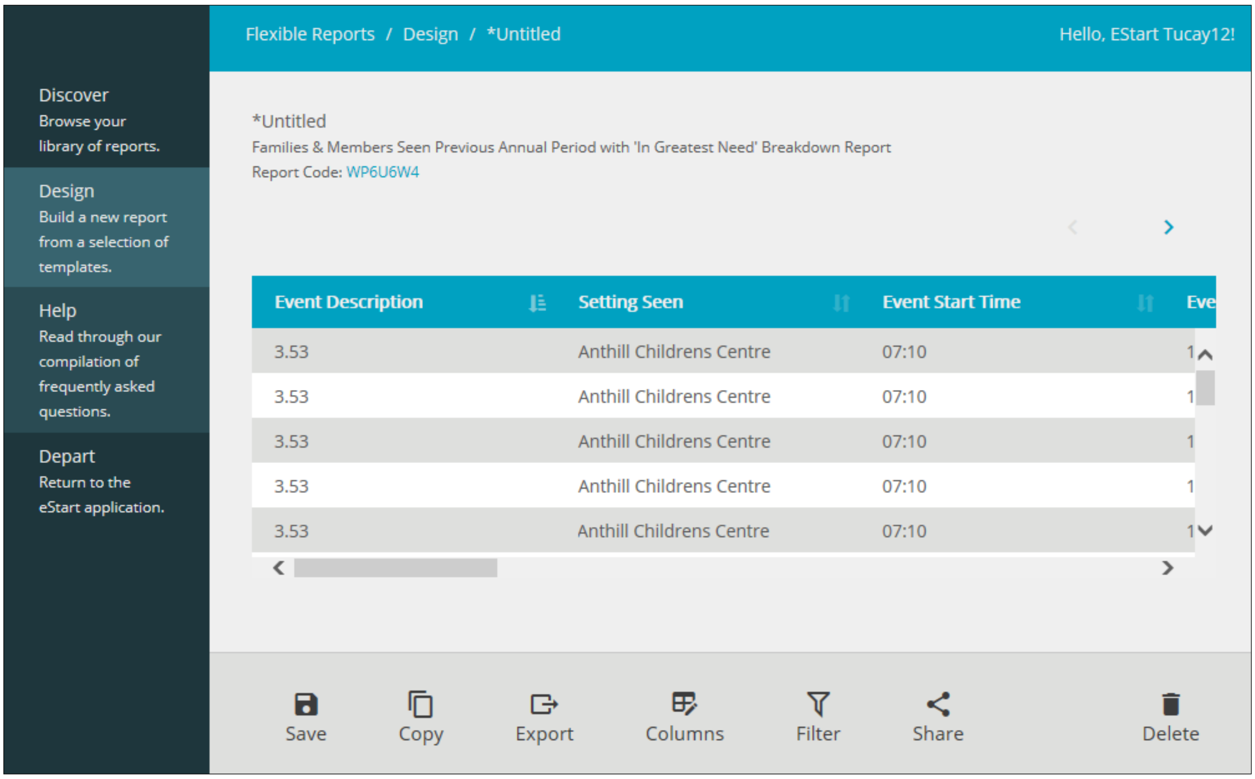
   After the copy is created, you are asked if you want to open the new copy.
4. Click the **Open** button to open the copy or click the **Close** button to return to the original report.

Exporting a flexible report

Flexible reports can be exported as Comma Separated Value (CSV) files.

To export a report as a CSV file:

1. Open the report you want to export. For more information, see Viewing a flexible report on page *151*.

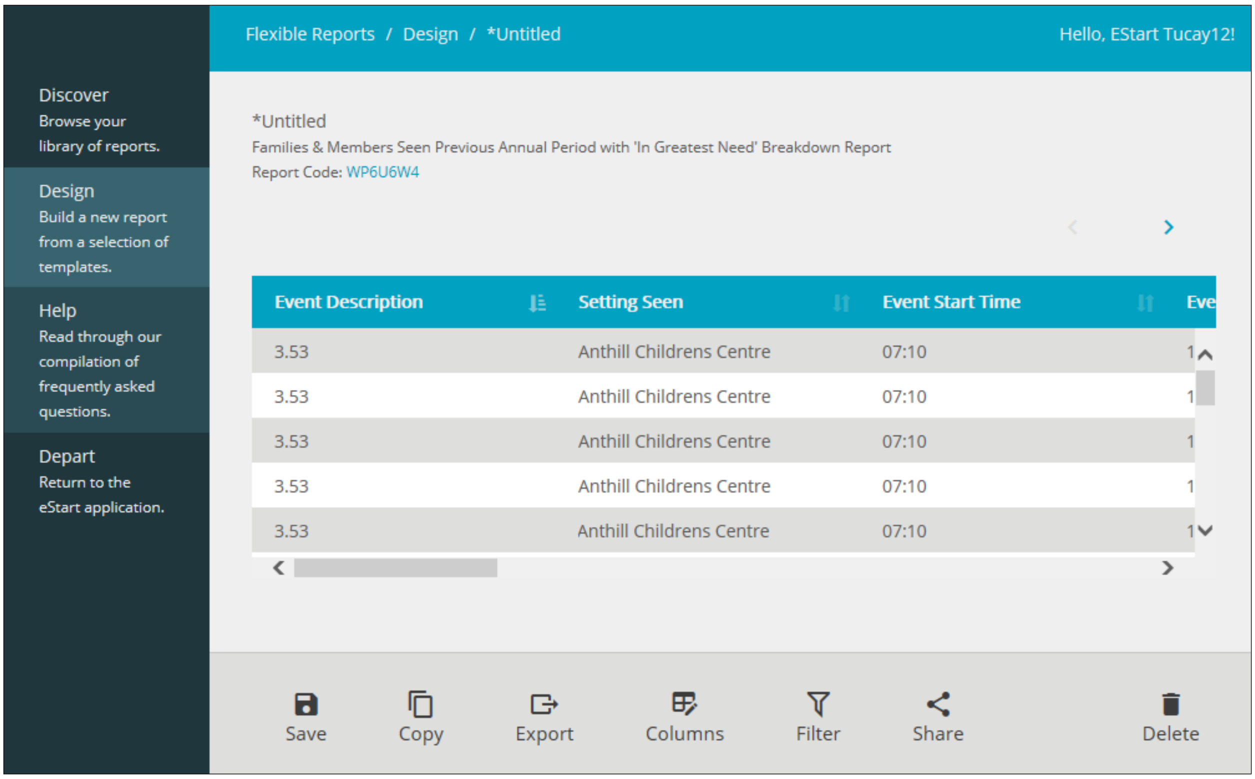


2. Click the **Export** button to display a confirmation dialog.
3. Click the **Export** button to display your web browser's download dialog.
4. Save or open the CSV file as required.

Deleting a flexible report

If a report is no longer required, it can be deleted.

1. Open the report you want to copy. For more information, see Viewing a flexible report on page *151*.



2. Click the **Delete** button to display a confirmation message.
3. Click the **Delete** button to confirm deletion.

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