Cumbria County Council

eStart Web User Manual

Contents

General Information

Technical Support

Email: performance.support@cumbria.gov.uk

Information Security

Cumbria County Council Children Data Quality Policy

All eStart Users must sign a Code of Connection form to confirm they have undertaken training before access is provided

All applicants must sign to say they have read and will adhere to Cumbria County Council

Documentation and policies such as;

- Data Protection for Employees
- Cumbria County Council Information and Computer Security Handbook
- Cumbria County Council ICT Corporate Acceptable Use Policy Statement of Agreement- to be signed at training session
- Cumbria County Council ICT Corporate Acceptable Use Policy
- Cumbria County Council Corporate Data Quality Statement
- Cumbria Children's Centre eStart Web User Manual

Use of Information Systems & Data Protection: What the law says about personal information:

It belongs to the individual it identifies

We are required to keep only accurate data and only for as long as we need to

Data must never be disclosed inappropriately

Data must be held securely in all formats (paper, electronic etc)

The Local Authority and YOU can be prosecuted

Use of Information Systems

It must only be used for the purposes you are instructed

Browsing is not permitted and can be illegal

Never share or disclose your username or password details

Lock your computer when you are away from your desk even if it is for a minute

Ensure your desk is clear at the end of each day/break time ensure all data is locked away

Data Extracts and printing

Only extract or export from the system when authorized to do so

Any extracted or printed data is governed by the same laws as when it is on the system

Remember to delete any data spread sheets you have exported to your PC

Ensure that all personal data is shredded when you are disposing of it

Remember even printouts need to be held securely

Portable media and email

Never put person identifiable or sensitive data on:

USB Sticks

Mobile Phones (including PDA's)

Portable Hard drives

Laptops and local desktop PC's

Remember even if you are victim of a burglary and lose your PC, you are still responsible for what you have put onto it!!

Do not email personal data outside your organization without it being suitably encrypted

Data Quality Principles

ACCURATE:

Data should be accurate to ensure that a good overall picture can be obtained

The registration form should be completed in full by the parent/carer wherever possible

Centre staff can complete it in consultation with the parent/carer.

COMPLETE:

Data should be complete and not contain invalid records or missing data

Children's Centre Managers are accountable for good quality data gathering within their Children's Centre

Errors and missing data once identified will be referred back to the Children's Centre inputter who will be responsible for ensuring the data is completed and updated.

RELEVANT:

The data collected should be relevant to the purpose of Children's Centre monitoring and reporting. An annual review of reporting requirements will take place.

RELIABLE:

All Children's Centres are to use the same Registration form. This will ensure consistent collection of data across the County

Children's Centres are responsible for updating data as soon as they become aware of it e.g. change of address, new birth, name of baby etc

Children's Centres will undertake a review of data on file with families, either by issuing new forms or checking data with families.

TIMELY:

Data should be captured quickly after the event or activity and must be available for the intended use within a reasonable amount of time. Data must be available to support information needs and enable informed decisions around service provision.

Frequency	Task	Responsible for ensuring completion of task
Daily	Entering of Children's Centre registration forms	Children's Centres
Within 5 days of service taking place	Entering of service attendance register	Children's Centres

VALID:

Data should be recorded and used in compliance with relevant requirements, rules and definitions

eStart System Users

Staff who are no longer working at a Children's Centre for periods exceeding 3 months e.g. long term leave, maternity leave, suspension, resignation, secondment or any other reason, are to be made inactive users on the software. If pre-planned this should be done by the Children's Centre on or before their last date of work. If unplanned this should be done as soon as it becomes known.

The responsibility rests with **Children's Centre Manager** to contact the performance.support@cumbria.gov.uk

Staff members who wish to use the eStart system should also contact the performance.support@cumbria.gov.uk

eStart Registration form

A registration form has been developed for Cumbria's Children's Centres to use.

CC Registration Form 20.8.12

Generic privacy notice 30.1.12

When a parent/ carer register with a Children's Centre they must also receive a 'Privacy Notice'. This will inform them about what we do with the data we gather according to the Data Protection Act 1998.

Using the Form

- A template of the Sure Start Children's Centre registration form will be made available for Children's Centres in this guidance. It is the responsibility of Children's Centres to make copies and distribute forms to centre staff as appropriate.

- It is essential prior to any new registration form being completed and entered on the system, to search the eStart database, to ensure that the family has not already been registered. This avoids duplication of families in the database and it is essential that all centres **search both active and inactive families** before entering data into the system.

- The form has been developed to obtain the minimum data set required for reporting and planning purposes. Use of the forms ensures consistency of data collection and enhances accuracy of data recording.

Storing Hard Copies of the Form

- Children's Centre Managers need to ensure that the original hard copies of the registration forms are securely stored in their Children's Centre. All paper records are to be stored by the Children's Centre for audit purposes.

Registering Families

- The Sure Start Children's Centre Registration Form is to be completed with the mother / father / carer, with assistance from the Children's Centre where appropriate. This form collects the minimum amount of information required.

- When information from the registration form is entered in eStart a family ID number is generated by the software and this needs to be written onto each Sure Start registration form before being filed at the Children's Centre.

Mother / Father / Carer Details

- **Address-** All Cumbria addresses have been pre-populated through a post-code lookup system in eStart. Regular system updates will occur at intervals throughout the year to incorporate new Royal Mail data.

- There may be an occasion when a family does not have a recognised Royal Mail address. Should this be the case please email performance.support@cumbria.gov.uk and we will put this postcode onto eStart for you.

- **Postcode** - It is important to enter the postcode on each registration. Children's Centres and the Local Authority will also need this information for reporting and analysis. It will also enable mapping software to be used to evaluate the data.

- **Date of Birth** - This information is important for reporting purposes; for example to create a report on teenage parents.

- **Relationship to children** - An extensive list has been included in the database and it is essential that the data be entered correctly as the relationship will have implications for the services provided.

- **Ethnicity** - The information will be needed by Children's Centres and the Local Authority for reporting purposes. Standard Government Ethnicity classifications have been pre-populated in a drop down list in eStart.

- **Language** - Determining the main language spoken and the degree of fluency in English will assist Children's Centres in monitoring needs for interpreters and facilitating appropriate methods of communication.

- **Disability** – Children's Centres will be required to report on the numbers of mother / father / carers and children who access their services who have a disability.

  The Disability Discrimination Act 1995 defines a person as having a disability if s/he
  '*has a long term physical or mental impairment which has substantial and long term adverse effect on his / her ability to carry out normal day to day activities'*.

- **Lone Parent** - Centres will be able to report on the amount of lone parents that have registered and accessed their services

- **GP Surgery**- Lists of Cumbria's GP's surgeries have been pre-populated in a drop down list in eStart.

- **NHS number-** This data will assist in the reporting of any duplicate records in the system and also help partners work in an integrated way

- **Dental Surgery-** This data will determine whether we should encourage dental care in the area

- **Smoking-** this data can be reported on to show the level of smoking households within the registered children's centre users.

- **Pregnancy due date** - This information will assist Children's Centres in reaching new born children and their families.

- **Employment Status** - Standard government employment classifications have been pre-populated in a drop down list in eStart.

Child 1 and 2

- **Disability** - This section allows you to record if a child has a disability. Where multiple disabilities are present, the Primary disability should be recorded. This section is NOT used for recording Special Educational Needs – this is stored specifically under SEN

- **Special Educational Needs SEN** – This will enable the Children's Centre to plan services appropriate for the child**.**

Logging into eStart

To log in, open up Internet Explorer and go to https://emsonline.cumbria.gov.uk/estart/ and you will be taken to the login screen.

Before you log in it is a good idea to save this page to your favourite sites, so go to "Favourites" on the top menu of Internet Explorer and select "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.

Figure 1 eStart Web login page

Enter the username and password provided by your Administrator and you will be taken to the **Home Screen**.

Colours and Indicators

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

Where text appears in red, this indicates that more information needs to be added, or that something is incomplete.
Fields in yellow are required fields and the system cannot continue until the field is completed.

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

People Icons

When looking at the results of a search, the individuals will be displayed with different colours and icons:

Baby Girl   **Baby Boy**

Girl   **Boy**

Female Carer   **Male Carer**

Relationship to Child Not Set   **Gender Not Set**

Find People

The People Search Facility

The **Search** option on eStart allows you to find any individuals that have been entered onto the system.

⚠️ It is very important to avoid duplication of records so you **must always** search for a person or family **before** you add them onto the system.

Click on **Find People** on the main menu or **Search** in the left hand menu to open the Search.
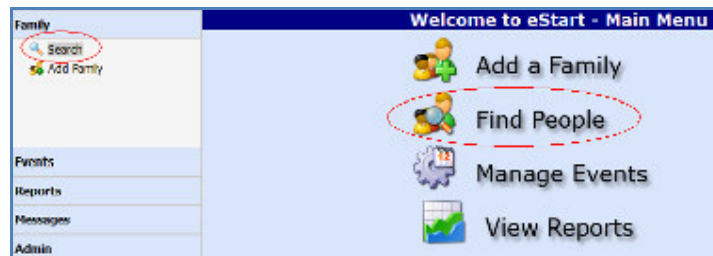
Figure 2 Search for a Person

Using the search facility is a very simple process; you will have to enter in some information and then select the results which match your criteria.

You have many search options to obtain the data that you require; you can search for First Name, Surname, Address, Postcode, Family Status, Member ID, Family ID, Member Status, Type (child, carer or both), the Setting they are registered in and their Date of Birth.
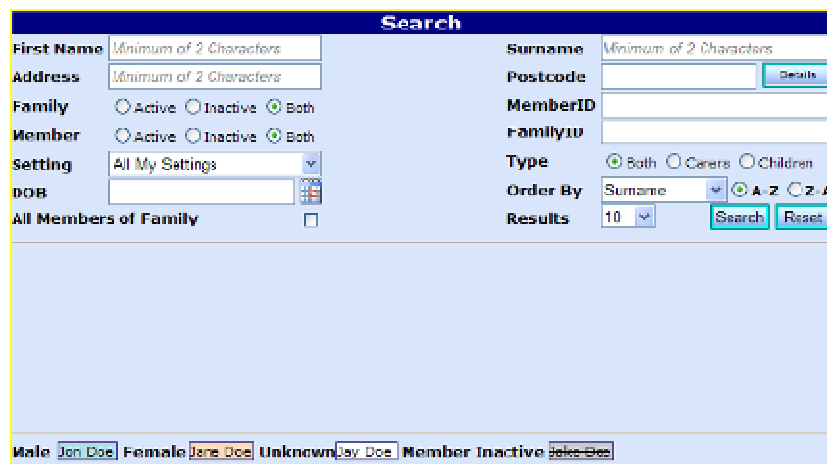
Figure 3 Search for a Person | Search Criteria

You can search using part or all of a name, postcode, family ID number etc. It is better not to make your search too specific, e.g. type in "Jon" instead of "Jones" and "SL4" instead of "SL4 5AA" but you must enter at least **two characters** in any field when you are searching.

You can use the % symbol as a wildcard in eStart searches. This means that if you enter % instead of a character the search will act as if the % is *any* character, including an apostrophe or space e.g.

using **D%** in the surname field would result in all the surnames starting with D (Davies, D'Angelo etc). The wildcard is particularly useful when searching for a name such as O'Connor that might have been entered either as O' Connor, O Connor or Oconnor. By entering O% the search will find all of these versions. Entering just %% (i.e. the required minimum two characters) will return all results that meet the other search criteria.

You can also choose whether you wish to see all the members of the family, and whether you would prefer 10, 50, 100 or even 500 results displayed.

Once you have the results if you would like them to be displayed in a certain format you can select the **Order by** function.

By default the list will be displayed by Surname, however this can be changed to Name, Address, Postcode, Family ID or Age.

The default search criteria are set to show the Status of the Family and Individual Member as **Both**.

If you enter a postcode, clicking on the **Details** button displays the full address information for that area. It also shows the nearest Children's Centre / Setting.

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

The search can be designed to suit the number of results you want to be displayed; a very basic search will produce a large number of results:

Figure 4 Search results using a single criterion

To get the most from your results it is always best to perform a search with more criteria. This will save time having to trawl through all the results.

Figure 5 Search results using additional criteria

To go to the details for an individual, click the **Go** button against their name and their Family screen will be displayed.

If you are now accessing other areas of eStart, you can always go back to the results of the search by clicking on **Search** then **Results** in the left-hand menu.

Figure 6 Returning to the search results via the menu

This will display the results of the search that was carried out previously.

If you click only on Search, this will give the criteria that were entered, without the results.

You can also select members of the current family and view various details about them using the tree view on the left hand side of the screen.

Figure 7 Current Family tree view

Add a Family

Add a New Family

Select **Add a Family** from the Main Page or from the left hand menu.

Figure 8 Add a New Family

Address Details

Complete the fields below. All fields in yellow are mandatory (must be completed).

Figure 9 Add a Family screen

Enter the postcode you require in the Postcode field and click **Lookup** to display a list of known addresses for that postcode.

If you are unsure of the postcode, you can enter a house number and click **Lookup**. Please note that this will produce a long list of all addresses which may include that particular house number.

Never add an address manually. If you can't find an address through lookup contact performance.support@cumbria.gov.uk   for advice

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

Figure 10 Add a Family | Matching addresses for a postcode

Add the home phone number

Select SAVE

Do not change or enter anything on this screen.

Select Next

Find the GP from the selection.   Then select Next

Add Children and Carers

Next you can either enter details for a Carer or Child.

Figure 11 Add a Family | Add Children & Carers

Add a Carer

If you select **Add Carer** you will need to enter the following information:

Figure 12 Add a Family | Carer Information (1)

Carers consent: By default this will be ticked. Change if necessary

Title: Select title

First name: Enter name using capital for the first letter of name

Middle Name: Enter name using capital for the first letter of name

Surname: Enter name using capital for the first letter of name

Country of birth: Not used

Marital Status: Not used

Relationship to child: Select from list.

Baby due: Fill in if appropriate. If not please ignore

Mobile Phone: Mobile phones numbers have 11 digits and should be entered without spaces. If this is entered incorrectly eStart will tell you to amend it.

Status: Leave as active

Email Address: Type in email address

Date of birth: select the calendar icon and select date. Always use the calendars

ContactPoint Stop Notice: Not used

Post-natal depression: Not used

Send correspondence: By default this will be ticked. Change if necessary

Lone Parent: Tick if appropriate

Select Next

Figure 13 Add a Family | Carer Information (2)

Date Joined: Do not change

Employment: Select appropriate

Working Hours: Not used

Ethnicity: Select appropriate

Sub Ethnicity: If you have this information please use

Religion: not used

Benefits: Not used

Special Needs: Not used (for child only)

Disabilities: Select 'adult yes' if there is a disability. Otherwise leave blank

Warnings: Not used

Click on **Next** when you have finished

Carer's Address and Languages

Sometimes a carer's address may be different to the child's. In such a case these details can also 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. You will also need to select **Language** 'Spoken and English' details from dropdown lists. You do not need to use the Read and Written dropdowns. Please see below:

Figure 14 Add a Family | Carer Address & Language Details

Carer's Smoking History

You can now enter any smoking data under 'description' to indicate whether the carer is a smoker or not. Click on **Finish** when ready.

Figure 15 Add a Family | Carer Smoking History

If you are entering smoking details you need to enter both a Reason for Change and a Description. The information will not be saved without these entries. Once this data is complete click on **Add**; the details will be saved and displayed below. Once you have added in the Smoking History, click on **Finish** and select OK when the 'New Carer added' box appears.

Figure 16 Add a Family | Added Carer Smoking History

Add a Child

Next you can enter details for a Child. Alternatively you can click on **Finish** to create the record (if you do this you will need to enter Child Details at a later time).

Figure 17 Add a Family - new family with Carer details added

If you select **Add Child** you will now need to enter the following information:

*Figure 18 Add a Family | Child Information (1)*

Carer's consent: By default this will be ticked. Change if necessary

First name: Enter name using capital for the first letter of name

Middle Name: Enter name using capital for the first letter of name

Surname: Enter name using capital for the first letter of name

Looked After Child: Do not use

Contactpoint stop notice: Do not use

Date of Birth:

School: Not used

Ethnicity: Select appropriate

Sub-Ethnicity: Please fill in if you have this information

Carers with parental responsibility: Do not use

Other Carers for this child: Do not use

Select Next

Figure 19 Add a Family | Child Information (2)

Date Joined: Do not change

Status: Leave as active

Gender: Select appropriate

Religion: Not used

Special Needs: Select appropriate (guidance below)

Disabilities: Select appropriate

Warnings: Not used

Select Next

School Action and School Action Plus

The SEN Code of Practice refers to the different types of educational support available for children with SEN. Although many people think of support in terms of Statements of SEN or being placed in a special school most children with SEN have their needs met with existing support already available in a mainstream school. This support is provided at two levels: School Action (SA) and School Action Plus (SA+).

WHAT IS SCHOOL ACTION? (Known as Early Years Action in Early Years Settings)

School Action ("SA") is used when there is evidence that a child is not making progress at school and there is a need for action to be taken to meet learning difficulties. SA can include the involvement of extra teachers and may also require the use of different learning materials, special equipment or a different teaching strategy.

Teachers may become aware of the need for intervention at SA where there is little progress in the child's ability despite targeted teaching, where there are difficulties in core areas, where there are persistent Emotional and Behavioural Difficulties or where there are sensory or physical problems.

WHAT DOES THE SCHOOL ACTION STAGE INVOLVE?

At the SA stage the child's teacher will be looking for ways to support them in class and will work with the SENCO to find ways to support the child's learning. Parents must be informed that their child is considered to have SEN and has been placed at SA and will receive copies of the schools plans. Progress should be reviewed at least twice a year. In addition, an IEP should be written to assist the child.

WHAT IS SCHOOL ACTION PLUS?(Known as Early Years Action Plus in Early Years Settings)

School Action Plus ("SA+") is used where SA has not been able to help the child make adequate progress. At SA+ the school will seek external advice from the LEA's support services, the local Health Authority or from Social Services. For example, this may be advice from a Speech and Language Therapist (SaLT), an Occupational Therapist (OT) or Specialist Advisory Services dealing with Autism, Behavioural Needs etc. SA+ may also include one-to-one support and the involvement of an Educational Psychologist. As well as the use of external services, SA+ requires more detailed planning of interventions for children whose progress has been limited. A child's progress at SA+ stage should also be reviewed regularly (i.e. at least twice a year) and an IEP should also be written to assist the child.

WHEN TO MOVE FROM SCHOOL ACTION TO SCHOOL ACTION PLUS?

The test for whether there is a need for a child to move from SA to SA+ is whether the child is making "adequate progress". This is a broad term which can be defined in a number of different ways. It essentially depends on what the child's starting point is and what the expectations are of that child. It is usually down to the teacher's professional judgment.

Some ways of defining adequate progress include; progress that matches or betters the child's previous rate of progress, progress that is satisfactory to the child and the parents or progress which closes the gap between the child and the child's peers. Where a child is still not making adequate progress at the SA+ stage then the child's school or parents can request a Statutory Assessment, which may lead to them receiving a Statement of SEN .

Child's Address and Languages

If a child's address is different to the Carers stated on the registration form i.e. Childminder/ grandparents then the Child should added onto eStart with the person who has parental responsibility for them.

We do not collect language information for children on the eStart registration form

Child's Health Details- not currently used

We do not record this information on eStart in Cumbria as it's collected elsewhere.

Figure 20 Add a Family | Child Health Details

Clicking on **Finish** will take you back to the **Add Children and Carers** screen.

Click **Finish** on this screen to go to the family record you have created.

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

Family

Family Screen

This screen will be displayed when you have selected a member on the search screen or when you click on **Current Family** in the left hand menu.

The Family screen shows all the main information about a family. You will see all the basic details such as Address, Telephone Number, Date Joined, GP information and the Setting in which they live.

You will also see the **Status** of the family and all carers and children that are included in this family.

Figure 21 Family screen

To add a carer or child to the current family, select the buttons situated at the top right hand side. To view the current carer or child record, click on the **Go** button ■ next to their name.

You can perform amendments on a family record by simply selecting from the relevant dropdown and then clicking on **Save**.

💡 Please note that in order to make a family completely inactive you need to make all the members of the family inactive as well. Simply changing the Family Status to **Inactive** will not make all the members of that family inactive.

Family Icons

On the **Family** screen there are many different icons which represent different details about a family. If an icon is greyed out then it does not apply to the family, however if it is highlighted than it is applicable.

Figure 22 Icons not applicable for a family
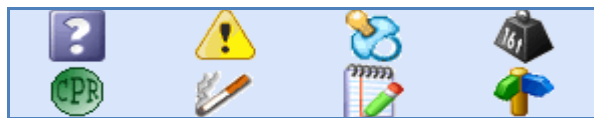
Figure 23 Icons applicable for a family

This icon represents Families that are **Out of Area**, have no children within the **age range** for attending a children's centre and have **no pregnant carer**. - not currently used

This icon represents Carers who have **warnings** against them.

This icon represents **pregnant carers** and will be highlighted if any carers are pregnant.

This icon represents children with a **low birth weight** within the family- not currently used

This icon represents children who are on the **Child Protection Register**.

This icon represents families that have carers who **smoke**.

This icon represents a **Notes History** for the family and it will be highlighted if there are any notes stored against the family. - not currently used

This icon represents Families that have **Open referrals** - not currently used

Hovering your mouse above any of these icons will display further details pertaining to that icon.
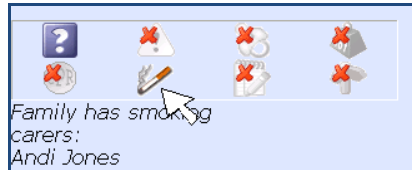
Figure 24 Hovering over family icon

Change an Address

If you have been notified by the family that the address has changed, then click on **Change Address**.

The following screen will now be displayed:

Figure 25 Changing a family address

You can enter the new address here using the **postcode lookup tool**. Select the date they moved in and click **Save**. The family address will now be updated.

Where is this?

The 'Where is this?' button allows you to view an area on a map. The area is usually where the family address is located.

To view an area simply click on the **Where is this?** button on the Family screen This will open up a new window and take you to a website which will show a map of where the area is located.

Additional Details for a Family

Using the left hand menu there are various extra details that can be added to the family.
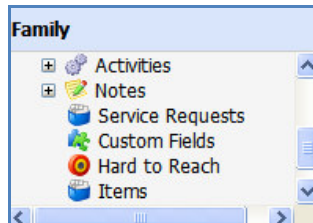
The options are: Activities, Notes, Service Requests, Custom Fields, Hard to Reach, Items and Family UNA.

Figure 26 Additional Family Menu Options

Activities- adding a family to an event

When you click on Activities, the screen will display a list of all Events attended by this member. All of these Events and Activities are known as **Contacts**.

To add an Activity for the family, expand the Activities section, and select **New Contact**. If you wish to view current activities attended by the family then select **Existing Contact**.
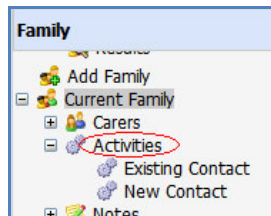
Figure 27 Family | Activities

To add a family contact, first select the Setting (by which it is held) from the Settings dropdown list.

Figure 28 Activities (New Contact) screen

This will then make the Home visit check box and Event Type dropdown list available:

Figure 29 Activities (New Contact) screen with Setting selected

Tick the Home Visit box if appropriate and then select the Event Type. This, in turn, will make available the Date Range (from / to) selectors.

Figure 30 Activities screen with setting and event type selected

Enter the dates from and to, or click on the calendar icons to the left of the text box and select the date from the calendar that is displayed. Once this is done, click search.

A list of event dates will then be displayed along with a tick box to the left hand side of each event date.

The screen will then look like the example below:

Figure 31 Activities screen with date range selected

To add a family, care worker or health visitor (or multiple family members, care workers or health visitors) to an event instance (or multiple event instances) simply click on the tick boxes of the individuals you wish to add and the event dates to which you wish to add them and click save.

Notes- not currently used

eStart allows you to keep two sorts of notes on carers, children and families.

These are **General Notes** (Notes History) and **Confidential Notes** (which are not viewable by general users and have a higher permission level).

Your ability to view / create a Notes History and Confidential Notes will depend on your level of permissions
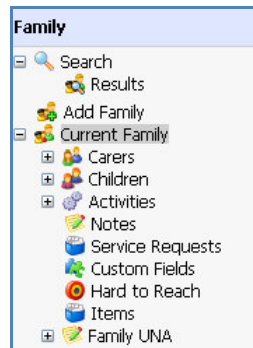
Notes for the current family and for the children and carers in that family are accessible via the tree view.

Figure 32 Current Family node

Family notes appear under the Current Family node.

To view notes for a carer or child within the family, however, you must expand the child or carer node (click the plus symbol to the left) and expand the node again for the carer/child in question.
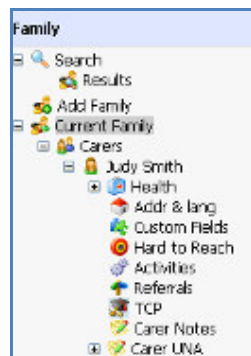
Figure 33 Carer notes

On clicking **Notes** you will be taken to a screen with three tabs. The first, which is highlighted, is **Notes History**.

Notes History Tab- not currently used

Figure 34 Notes History tab

This gives details of any general notes and allows you to add new notes via the **Add** Button.

When you click the **Add** button a text editor opens to allow you to add your notes:

Figure 35 Individual Note History

When adding a General Note in the Notes History you can select the date and relevant Careworker or Health visitor, before clicking Save to complete.

You can also view existing notes by clicking the **view** option to the left of the note date. This will present you with a similar screen detailing the full text of the note selected.

Figure 36 Entering Note Details

Confidential Notes Tab- not currently used

This tab presents you with exactly the same options as the Notes History tab but is intended for notes of a private nature. Only users who have a suitably high level of permission will be able to view Confidential Notes.

Summary Tab

This is a printable list of notes. You can check the **Only Notes History** or **Only Confidential Notes** checkboxes to display one or the other or leave both boxes empty to display both types (if you have the correct permission level to view Confidential Notes).

Figure 37 Notes Summary tab

Service Requests

Service Requests can be added to a family's account; this is for families that have been referred to external agencies, and eStart can then record assessments on the family.

Click on **Service Requests**, and then choose **New Service Request**.

You should now complete all fields with a dropdown list and click the **Save** button.

Figure 38 Family | Service Requests

Administrators can add items to all the dropdowns through the Admin section.

Custom Fields- not currently used

These reports are for families only. Many more Reports are available through the Reports menu.

Custom Fields allows you to generate reports on statistical data. If one of the fields has been ticked, a report can be run to produce a list of all families who had this option ticked.

Figure 39 Family | Custom Fields

Hard to Reach- not currently used

The **Hard to Reach** section works similarly to Custom Fields. It records information about a family to highlight if they meet certain criteria for reporting. When a report is generated it will pick up all families who have had one of these fields ticked on their record.

Click on a box to select a criterion. You can choose more than one. When you have chosen a criterion you will then be able to type into the Value field if you wish. You will then need to click on the **Save** button.

Administrators can add in more fields through the Admin section.
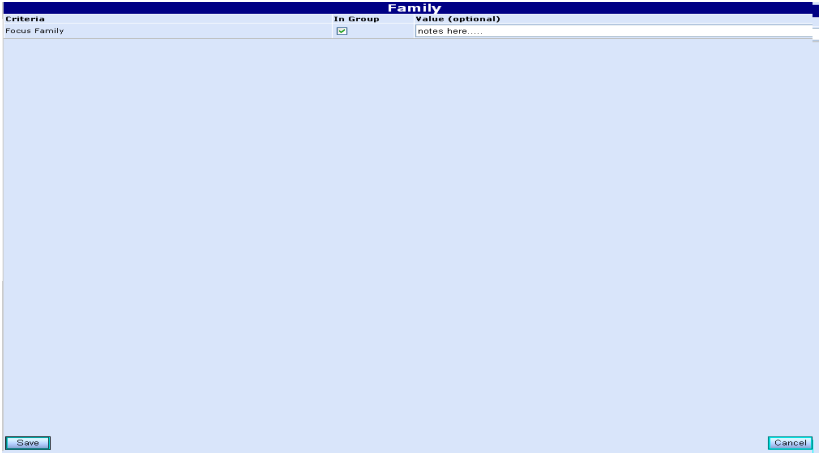
Figure 40 Family | Hard to Reach

Items

The **Items** section is used for to record whether any material has been borrowed by the family; to add new items, please select **Add New**. When you have chosen an item and added dates if required, click on **Insert** to add it to the family's record. You can later click on **Edit** to change any of the details for this item, then click **Update** to save the changes.

Figure 41 Family | Items

Audit Log and Access Log

If you have been given 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 also to see exactly which items within a record were changed.

For a more detailed explanation of these areas please see the chapter **Monitoring eStart Use** on page 42.

Carer Record

Carer Details

When you have accessed the family screen, click on **Go** next to the Carer's name to open their record.

Figure 42 Family | Carer screen

On this screen are the basic details: ID, Title, First Name, Surname, Carer Status, Date Joined, Email Address, Mobile Phone Number, Date of Birth, Employment Information, Ethnicity and Disabilities.

You can also see the relationship of this carer to the child.

Name History

If the carer's name has been incorrectly entered or has changed since registration, then click on **Name History.**

Figure 43 Family | Carer screen

📝 You will only be able to access Name History if you have the correct permission levels set for your account.
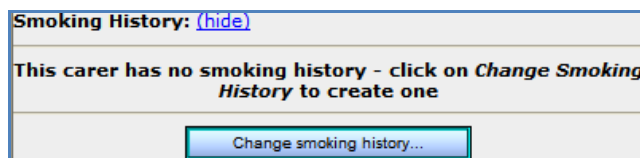
The following screen will now be displayed. Please complete all the necessary fields. A **Reason for Change** must be chosen otherwise it will not save.

Figure 44 Name Change Details

Administrators can add in more reasons through the Admin section.
Performance.support@cumbria.gov.uk

Smoking History

To add or update a Smoking History for the carer, click on the **Smoking History** button, and then click on **Change Smoking History**.

Figure 45 Smoking History | Change Smoking History

Please update all requested information. A reason must also be added in otherwise this information will not be saved. Click Add to save and display the changes, then **Finish**.

Figure 46 Smoking History Change Details

Administrators can add in more reasons through the Admin. section.

Benefits- not currently used

To add information about any benefits this carer is receiving (for example any Jobseekers Allowances or Disability Benefits), click on the **Update Benefits** button to display a list of benefits in the lower box.
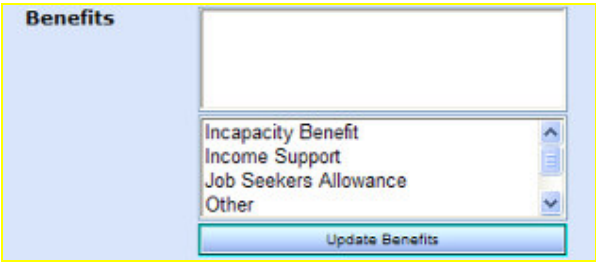
Figure 47 Update Benefits Information

Select a Benefit from the list in the lower box by clicking on it.

Your selection will now appear in the Benefits box above. You can remove a Benefit from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Administrators can add in more Benefits if needed, through the Admin section.

Special Needs- Child only

To update this information please click on the **Update Special Needs** button.

You will now have a list of Special Needs to choose from.
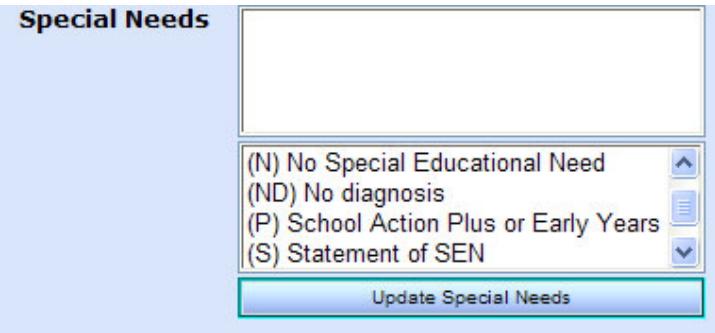
Figure 48 Update Special Needs

Select a Special Need from the list in the lower box by clicking on it.

Your selection will now appear in the Special Needs box above. You can remove a Special Need from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Administrators can add in more Special Needs if needed, through the Admin section.

Disabilities- Child and Carer

To update this information please click on the **Update Disabilities** button.

You will now have a list of Disability descriptions to choose from.
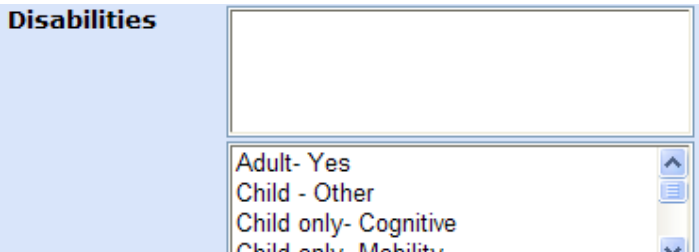
Figure 49 Update Disabilities

Select a Disability description from the list in the lower box by clicking on it.

Your selection will now appear in the warning box above. You can remove a description from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Administrators can add in more Disability descriptions if needed, through the Admin section.

Warnings- not currently used

This is used for Care Workers who may visit certain sites which may have restrictions or other aspects they need to be aware of. Clicking on **Update Warnings** will allow users to add a warning against the family record.

Figure 50 Update Warnings

Select a Warning description from the list in the lower box by clicking on it.

Your selection will now appear in the warning box above. You can remove a Warning from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Figure 51 Add Warnings

Administrators can add in more Warning descriptions if needed, through the Admin section.

Delete a Carer

It is not recommended to delete carers from the system as this information may be required for reporting purposes. However if a carer has requested a deletion of their account, then it can be removed.
Firstly the status of the individual will be set to active; this will need to be changed to inactive. Click on **Save** and a **Delete** button will appear; this allows you to remove the person from the system.

If a person has activity history then this person can not be deleted.

Figure 52 Delete a Carer

Administrators can add in more Status options through the Admin section.

Carer's Record - Additional Details

There are more extra details that can be added to a Carer's record. These are displayed in the left hand menu and many of these have been explained in the **Family** section.

Figure 53 Additional Details available for a Carer record

Health- not currently used

If you expand this section, you are presented with a history option. This section records all health information about the carer; if you press the **Add Contact** a new screen will be displayed.

Figure 54 Health History | Add Contact | Update Health Details

Once all fields are completed this will be recorded against the individual's record.

Address and Languages

This option allows you to change just one individual's address; this would be used if the member is living elsewhere but has been registered with the family.

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

Figure 55 Changing the address for an individual

Enter the person's address details. You will now have added an address for the carer which is different to the family's address.

You can also add in any different languages used by the carer on the right hand side.

Pregnancy

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

Figure 56 Pregnancy Details 1

Select the date when the baby is due. This will be highlighted on the family screen of a pregnant carer.

When you click **Save** a new button labelled **Baby Born** will now appear.

Figure 57 Pregnancy Details 2

When the carer has had the child, click this button to display a **Child Details** screen to add in the new child information.

If you wish to add details of this and previous pregnancies to the carer's record, click the **Add History** button and enter the details on the screen displayed:

Figure 58 Add Pregnancy History

The information will then be added to the Pregnancy Details screen.

Figure 59 Pregnancy Details with history

Alternatively you can record the ending of a pregnancy by clicking the **Pregnancy Ended** button:

Figure 60 Pregnancy Ended Details

Child Record

Child Details

On the **Child Details** screen are displayed the child's basic details: ID, First name, Surname, Date of Birth, Primary Carer, Gender, Date Joined, Status, National Health Number and Ethnicity.

You can also see any other Carers and a complete list of all Carers with Parental Responsibility for this child.

Figure 61 Child details screen

If the entry you need to choose is not in the lists of Special Needs and Disabilities you will need to speak to an eStart Administrator who will advise you performance.support@cumbriacc.gov.uk

Left England- not used

Date of Death

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

.

CPR History- not currently used

This is an abbreviation of the **Child Protection Register**. If you click on the **CPR History** button you will see the following:

Figure 62 Child | Change CPR History

When you select **Change CPR** the following screen will be displayed:

Figure 63 CPR History Details

The **On Register** tick box controls whether or not this information is visible on the Family screen. You can use this to indicate when a child is put on or taken off the register, including the date of the change, adding notes if necessary. A reason must be specified to ensure this is saved correctly.

Administrators can add in any additional reasons through the Admin section.

Child's Record - Additional Details

The menu on the left hand side can be used to add in more information on the child.
Many of the options have already been explained previously in the **Family** section.

Figure 64 Children Menu Options

Birth and Development- not currently used

This monitors the child's development process from birth. In this section you can record Breastfeeding information, Speech & Language and Birth Details. Administrators can add in more Development Plans (and their associated details) and Birth Locations through the Admin section.

Figure 65 Child Development screen

Referrals- **This section is only used by East Cumbria Family Support Association for particular contracts.**

In this section, a carer or child can be referred to a certain event or agency.

Figure 66 Referral node

Referrals are accessed in the tree view under the node for the relevant child or carer within the current family.

Clicking on **Referrals** will bring up a screen which lets you view or edit existing referrals or create new ones.

Figure 67 Referrals screen

A summary of the highlighted referral appears on the left. To highlight a different referral, simply click on the relevant referral's date in the date column.

When adding a new family to eStart after the initial visit you will need to record that this family has been referred to East Cumbria Family Support Association (ECFSA). This should be done on the referral screen for each family member. On the left hand side of the screenshot below I've chosen Fluffy Grey Mouse and recorded the referral against her details.

Screenshot of the referral section

Date of Referral- enter the date the referral was received by ECFSA
Referred to- do not use
Event – do not use
Referred by- do not use
Reason- Select appropriate reason from the dropdown
Action Taken- Select which organisation the referral came from
Appointment Date- do not use
Appointment with – Select the correct contract
CAF completed by – do not use
Lead professional – do not use
Status – Select 'open'
Notes – State 'New referral'
Date CAF closed – do not use
Consent – Select appropriate

Save the referral

Once the referral is saved the screenshot below is displayed

When a family has completed their family support intervention or parenting intervention with ECFSA the case should be closed.

Choose to 'edit' the existing referral and select 'Closed' on the Status field dropdown on the referral and case management screen for the family. Also enter a date in the Date CAF Closed field. This will allow a a report to be generated on closed cases and the date on which this happened. See screenshot below.

Monitoring eStart Use

Monitoring eStart Use- Access available for Super Admin users only

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

You will only be able to view these screens if you have been given the correct permissions to do so. By default only Console Managers will have access to the Audit and Access Logs, but they can give permission for other users to view them through the usual permissions route.

⚠ In order for the logs to display the correct information it is important that the web server date and time are accurate as these will be used for the date and time of the log records.

Audit Log

The Audit Log tracks all changes made to a record i.e. Carer and Child basic details, health data, custom fields, hard to reach, activities, referrals, and TCP attendance. For Family records, it also logs changes made to activities, service requests, custom fields, hard to reach and items.
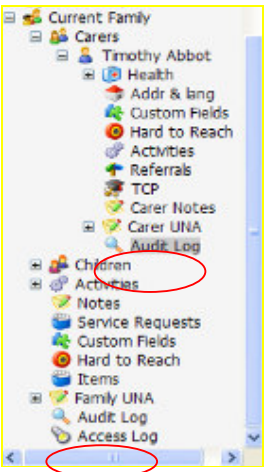
To view the Audit Log for a family (if you have the correct permissions), click on the + next to Current Family to open the menu, then click on **Audit Log**.

Similarly for a person (Carer or Child), click the + next to their name to open the menu, then click on **Audit Log**.

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

Figure 68 Audit Log (Carer)

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

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 will be when the person was added to eStart (if this was after the implementation of the Audit Log - see warning note below).

⚠ It is important to note that only information that has been added or changed since the Audit Log functionality was implemented in eStart v3.37 will be listed. No earlier information will be included in the Audit Log.

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 then you will need to click the **Search** button to display the list of results.

The **To CSV** button allows you to download the list to Excel and either open it or save it e.g. as an Excel spreadsheet. Make sure you give the file a suitably descriptive filename when you save it.
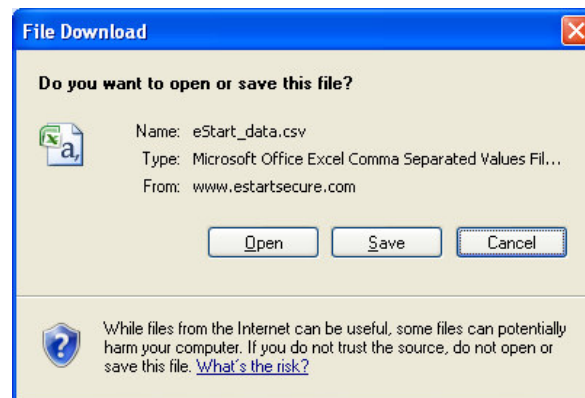
Figure 69 Export Audit Log to CSV

Changes are listed in the same way in the **Child** Audit Log:

Figure 70 Audit Log (Child)

And the **Family** Audit Log:

Figure 71 Audit Log (Family)

Access Log

The Access Log displays a log of all attempts made to access a **Family** record (not an individual record).
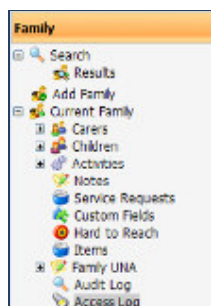
To view the Access Log for a family, click on the + next to Current Family to open the menu, then click on **Access Log**.

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

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

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

⚠ It is important to note that only access attempts made after the Access Log functionality was implemented in eStart v3.37 will be listed. No earlier information will be 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 then you will need to click the **Search** button to create the list of results.

The **To CSV** button allows you to download the list to Excel and either open it or save it e.g. as an Excel spreadsheet. Make sure you give the file a suitably descriptive filename when you save it.

Merging and Moving

Merging and Moving

 If a whole family moves house:

On the families main page select Change Address and when this is completed also change the setting. The setting (Children's Centre) will correspond to the postcode of the new address.

If you identify any duplicate child/ carer records

Email performance.support@cumbria.gov.uk stating the family and individual ID numbers and which information is correct and which information should be removed/merged. Please then check this family record and amend any details with are incorrect such as the GP, mobile number, date of birth, ethnicity etc. All the event history from both duplicate records will remain with the family.

Further examples

Children move into foster care
Children/ carers move in with other relatives
Children and one of the carers move house leaving other members of the family at the old address
Carer moves out of the family address with no forwarding address
If a child on eStart becomes a parent and stays at the family address
If a child on eStart becomes a parent and moves address

For any of these examples please email performance.support@cumbia.gov.uk

Use the merge function to merge Families, Carers, Children, Event Types, Users, Care workers or Doctors, or to move carers and children from one family to another.
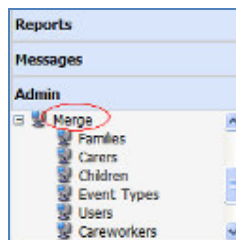
Select **Admin** in the left hand menu and click the **Merge** option.

Figure 72 Admin | Merge

Now select what you wish to merge. If, for example, you wish to merge Families, select this from the left hand side menu by clicking on it. You will now see the screen below:

Figure 73 Merge Families screen

Now select the family you wish to merge **from** by searching for it. You can search using Surname, Family ID, Street, or Postcode.

Click **Find** to display the results:

Figure 74 From (Merging) Family search results displayed

Select a record from the list of results displayed, by clicking on it. You will notice the record's **Family ID** is now displayed in the yellow box below.

Figure 75 Selected Merging Family's ID displayed

You will now need to repeat the same process for the family you wish to merge **to**.

Figure 76 Merging and Master Families both selected

Now select **Continue**.

The next screen will confirm the merge and ask who you wish to transfer from one family in to the other.

Figure 77 Merge Menu - Select People to transfer

To avid duplicates, you are advised to choose **Merge Carer** and then **Merge Children** before Merging this Family. This is so that all essential data can be passed across first.

You can click and drag a carer from the left to the right; this moves the carer to the new Family ID.

By placing the individuals in the box below (middle) this will merge the members together. You are asked to choose which items of data you wish to keep or remove.

Figure 78 Merge Menu - Select Data Items

Select the fields you wish to merge by ticking the checkboxes (under the Select menu).

Now choose a reason for the merge and select **Merge** (see below).

Figure 79 Selecting a reason for the family merge

The final merge to perform is the **Merge Family** option; this removes the old Family ID and keeps the new ID on the system.

If the merge completes successfully the following message is displayed. Click on **Done**.

Figure 73 Merge successfully completed and database updated

Events

Events Section

The **Events** section of eStart allows you to enter the details of a new Event and add **Attendees** or **Registrants** to an event. To access Events you can click on either **Events** from the left-hand menu or click on **Manage Events** from the Home page.
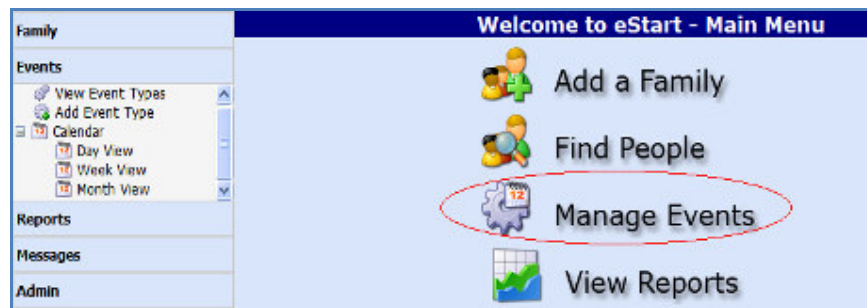
Figure 80 Manage Events

To create a new event, click **Add Event Type.** You are now presented with a blank form to complete with all the data for this event.

Figure 81 Add New Event Type

Description- Type in the name of the activity

Setting- Select which Children's Centre footprint the event is taking place in.

Project Leader- Select Lead worker at event- ECFSA Officer

Provider- Select a provider

Location- Select location. If a new location is required email performance.support@cumbria.gov.uk

Frequency- do not use

Group – do not use

Theme- Select the theme relevant to this event

Access Group- do not use

Outcome Type- select appropriate

To handheld- do not use

TCP- do not use

Home Visit- tick if this event is at a home address

Hide- do not use

Start time- Specify the start time

Duration- State number of minutes

Capacity- do not use

Family Points- do not use

Aims- do not use

Save the event

The screenshot below will appear. You will notice that the event you've just created has no dates. Select the 'Add date' on the left hand side.

Once the data has been entered and saved, select **Add Date** from the left-hand menu.

Figure 82 Adding a date for an event

You can input a date in the future; this will allow you to register members for the event.

If this is a date in the past, this screen will be displayed:

Figure 83 Past Events screen

The **Duplicate** option allows you to repeat the same event if this occurs frequently, this will save time by not having to add a new event each time. See **Event Recurrence** for further details.

The results and From/To options let you narrow down the event dates displayed to only those between specific dates and / or the top number of results.

Event Register

The Print button opens the **Event Register**. This is a Crystal report listing all the registrants for the event including their Family ID, Type, Age (children) and Postcode, and indicating whether or not they actually attended. Use the Crystal toolbar to export, print, change page or search the results. See **Report Toolbar** on page 91.

Event Attendees

Click on **Attendees** to add in all members for the event. A **Search** screen with three tabs is displayed:

Figure 84 Search for Attendees to add to an Event

Enter your search criteria and click the **Search** button. When you obtain the relevant results, select the attendee(s) by clicking the ![button] button. You can then use the tick boxes against the names in the right hand box to select them for the event. Ticking the box in the header bar will select all the names.

Now select a **Care worker** for this event; they are selected in the same way as above by clicking on the ![button] button next to the Care Worker's name.

Please Note: Only Care Workers associated with the selected setting will appear in the list.

Figure 85 Search for Care Workers to add to an Event

Click on **Save** and the confirmation will be displayed:

Figure 86 Save confirmation

You can also add in **Anonymous Members** (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 **Save**.

Figure 87 Search for Anonymous Members to add to an Event

If you click on the event name in the left hand menu, you will see this has been updated to reflect the **number of attendees**.

Figure 88 Attendees, Outcomes, and CW Durations

CW Durations will display a breakdown of the length of time spent by the Care Worker for each stage of the event.

Figure 89 Care Worker duration breakdown

Event Outcomes- Not currently used

You can also select **Outcomes** for this event. Click the **Outcomes** button against the event then select the relevant **outcome** and **outcome type** and **apply** to the attendee.

If there is more than one outcome applicable then this can be done by selecting the **Edit** button under **Multiple Outcomes**

Figure 90 Outcomes Screen

View Event Types

Now click on **View Event Types** from the left hand menu. You will see all events at the Children's Centre; the event will have **one date** stored on the system.

Event Satisfaction Ratings- not currently used

You can add **Satisfaction Ratings** for the events - click the **Satisfaction** button:

Figure 91 Event Type List

The Satisfaction Rating descriptions and order can be changed by an Administrator.

You will need to select the **Feedback Rating** the user has given to this event and apply it to the satisfaction rating.

Figure 92 Satisfaction Ratings Screen

Outcomes Summary- not currently used

The **Outcomes Summary** will provide the overall view of the event:

Figure 93 Outcome Summary for an Event

You have now successfully added an event.

Favourites

When viewing the Event Type List you can filter by the letters that the event starts with or by Favourites. The screen will automatically default to Favourites. You can add or remove any event from your favourites by checking or un-checking the **Add to Fav.** checkbox on the right hand side and clicking the **Save Favourites** button.
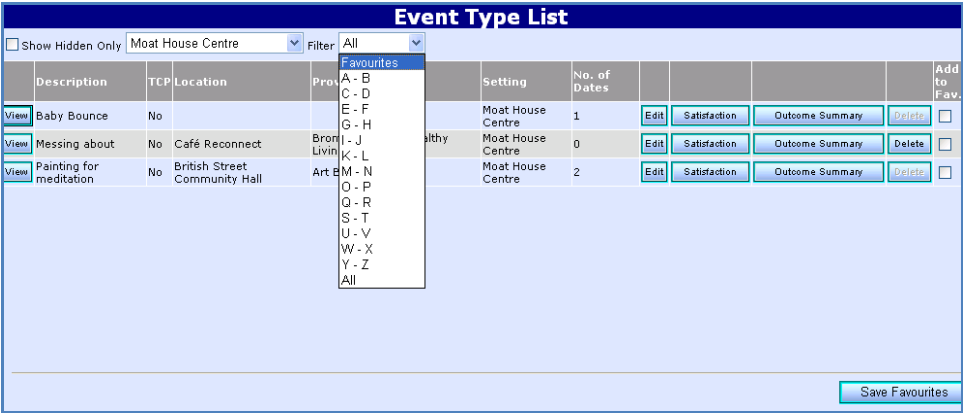
Figure 94 Events Favourites

Events Calendar
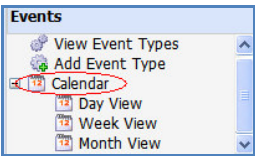
Figure 95 Events Calendar Options

The **Events Calendar** displays all events that are scheduled for a particular Day, Week or Month. When accessing each view you can click on the word **Key** at the top left on the screen, which will display a list identifying at which Children's Centre / Setting each event is scheduled to run.
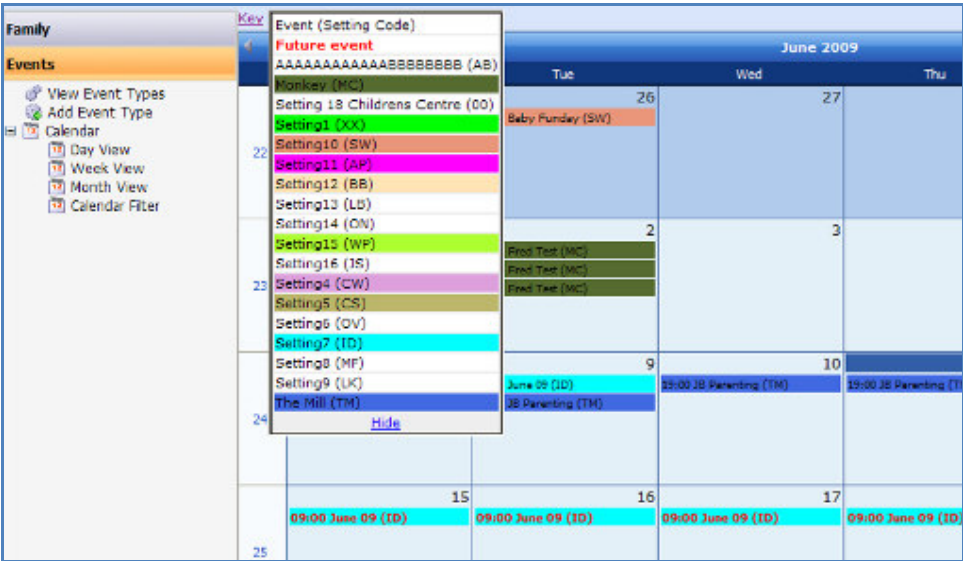
Figure 96 Events Setting Codes

There is also a **Help** link at the top right of the screen, which describes an option to make any amendments to the current display:

Figure 97 Help Option

Day View

This displays all events which are schedule to run for the current day. You can select different days by using the arrows on the left and right of the screen or the **Change Date** option at the top.

Figure 98 Calendar

Figure 99 Events Day View

Week View

This will display all the events with Monday being the start of each week

Figure 100 Events Week View

Month View

This displays all events scheduled for the Children's Centre for the month.

Figure 101 Events Month View

Event Recurrence

To create a recurring event click the **Duplicate** button against the event.

Figure 102 Past events view screen

You will now be in the edit event (Duplicate Date) screen - see Figure 103 below. Click on the **Recurrence** button.

Note: The details of start time, end time and outcome type, will be carried over for all the events created.

Figure 103 Duplicate events screen

The screen will now change to this:

Figure 104 Duplicate Event Dates

There are numerous options here to set up recurrences of this event; the page will generate a list of event dates for you, based on the start date and number of days that you select.

Figure 105 Duplicate Event Dates Populated

You have the option to include weekends (not selected by default), but can also then manually add or remove dates. When adding a new date, simply select the date in the calendar and click the 'Add' button.

Here, we have removed 'Wednesday, 03/12/2008' and added 'Monday, 08/12/2008' using the Add and Delete buttons and the calendar control.

Figure 106 Adding and Deleting Duplicate Event Dates

You can also choose whether to duplicate the registrants for these events or not. The Registrants check box (ticked by default) can be used for changing this.

Short Breaks- Children's Centre contract

The following guidance details how Short Breaks should be entered into eStart.

Screenshot to show a Short Breaks event being entered into eStart

Description- Type in Short Breaks and the name of the activity

Setting- Children's Centre footprint where the activity is taking place

Project Leader- Lead worker at event

Provider- Select chosen provider

Location- Select location. If a new location is required email   performance.support@cumbria.gov.uk

Frequency- not used

Group – not used

Theme- Select (A.5.1) Children with disabilities/ Additional Needs/ Short Breaks

Access Group- Select Children with disability

Outcome Type- select appropriate

To handheld- not used

TCP- not used

Home Visit- tick if this event is at a home address

Hide- not used

Start time- Specify the start time

Duration- State number of minutes

Capacity- Specify number able to attend this Short Break event

Family Points- not used

Aims- Choose an aim

Save the event

Manage Lists

Manage Lists

Manage Lists allows users to conduct searches on family data and so 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 spreadsheet or XML file.
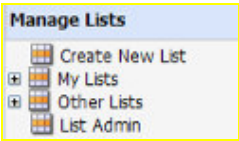
Figure 107 Manage Lists

There are two ways of sending 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. Careworkers), the **Messages** function allows you to create and send emails and SMS/Text messages through the eStart database without creating a list first - see page 73 onwards.

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

Create New List

Click on **Manage Lists**, then **Create New List**.
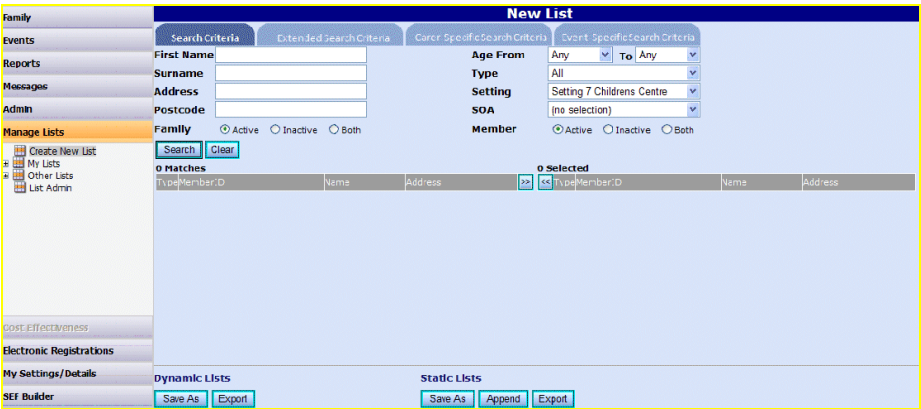
Figure 108 Create New List screen

You need to enter some criteria on which your list will be based. Once you have entered the criteria and searched, a list of all names recorded on the system that meet those criteria will be displayed. You can then select names from that initial list to create your final list.

The more criteria you use and the more details you enter into the criteria, the closer your search will be narrowed down and the fewer results will be generated. There are four tabs listing the search criteria, each with a **Clear** button to remove any entries you have made. The **Clear** buttons will only clear the entries for the tab you are currently on.

💡   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 will probably be to select **Create New List** again from the left hand menu, rather than to go into each tab and click **Clear** for each one.

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) and Member ID.

The Settings available are those to which you have access. The SOA dropdown is linked to the Setting dropdown, such that if a Setting has been selected, the list of SOAs available will be restricted to those that are linked to the Setting chosen. If you select the dropdown for SOA without having first selected a Setting then the list of SOAs available will be 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 e.g. 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 who are recorded in the system who meet the criteria will now be listed in the **Matches** column on the left hand side of the screen.

Figure 109 New List screen with Matches

*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.

- **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.

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.

Saving and Exporting a Static List

If this is to be a **Static List**, you can now click on the Move All [image] or [image] Move buttons to move the names you want to be in your list over to the right hand side, into the **Selected** list:

Figure 110 New List screen with Matches Selected

You can now save your list as a **Static List** by clicking the Static Lists **Save As** button, at which point you will need to give the list a name so that you can easily select it again in the future if necessary. You can also **Append** or **Export** it.

Saving and Exporting a Dynamic List

For a **Dynamic List**, instead of moving the results to the right hand **Selected** list, you should save or export the list directly from the left hand **Matches** list by clicking the Dynamic Lists **Save as** or **Export** button.

This is because Dynamic lists are continually changing. If you save your search results as a Dynamic list, the list will update itself using the live data on the system every time the list is opened. You should not move the search results to the right hand side since this is for Static lists that must be manually updated. If you do so then try to save the results as a Dynamic List, you will receive an error message.

Public and Private Lists

Dynamic Lists can be Public or Private.

Figure 111 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

Save List

The **Save** button is only available when you are viewing a previously created list. It allows you to make changes to the list and save it with the same name. If you wish to save a changed list as a new list, you must use the **Save As** button.

Figure 112 Viewing a previously saved static list

Append

The **Append** function allows you to add to an already existing list - for example you may have created a list in the past that you now wish to add extra members to.

Assuming you have run a search and have selected your members, you will now need to click on **Append**. You now need to select the existing list to which you wish to append the selected members.

Click on **OK** when you have made your selection.

Figure 113 List for appending members.

The selected members will now be added to your chosen list and this list can be retrieved at any time by selecting **Other Lists**.

Export

Once you are happy with the list you have produced you can then go on to save it, export it to a Microsoft application such as Excel or create Mail Shots.

Click on the Export button under Dynamic or Static Lists.

Figure 114 Export type dropdown.

Mail Shot

Select Mail Shot. The **Select Mail Merge Type** screen will be displayed.

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

Figure 115 Mail Merge Type Screen

It is important to note that 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** box ticked on their record.

Mailing Label

Set the Type to **Mailing Label**, select Merge to **This List** and click **OK**.
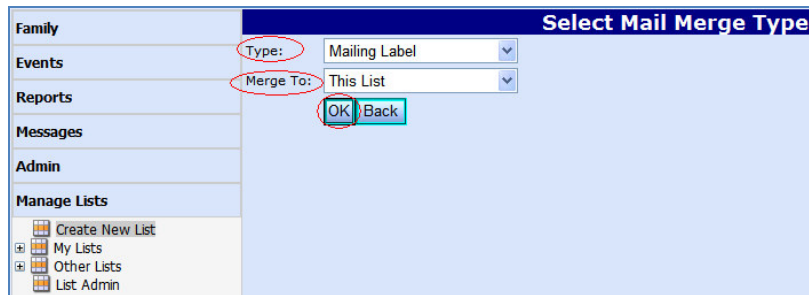
Figure 116 Selecting Mailing Label

You now need to choose a label type; you can select one of two sizes, L7163 or L7160. Now click on **OK**.

You will be presented with an option to **Open** or **Save.** You can select either option depending on what you want to do.
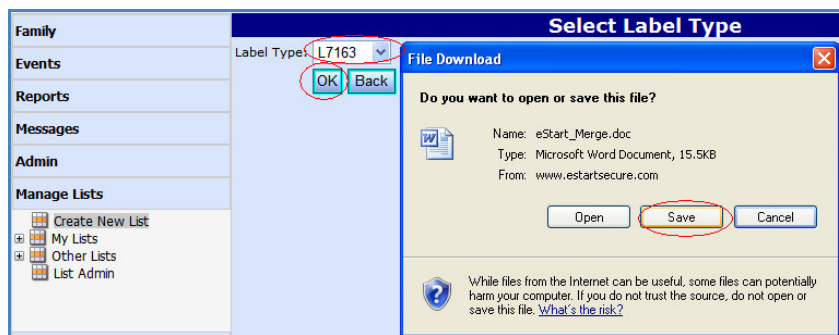
Figure 117 File Download dialog

Clicking on **Open** will allow you to view the mail shot:
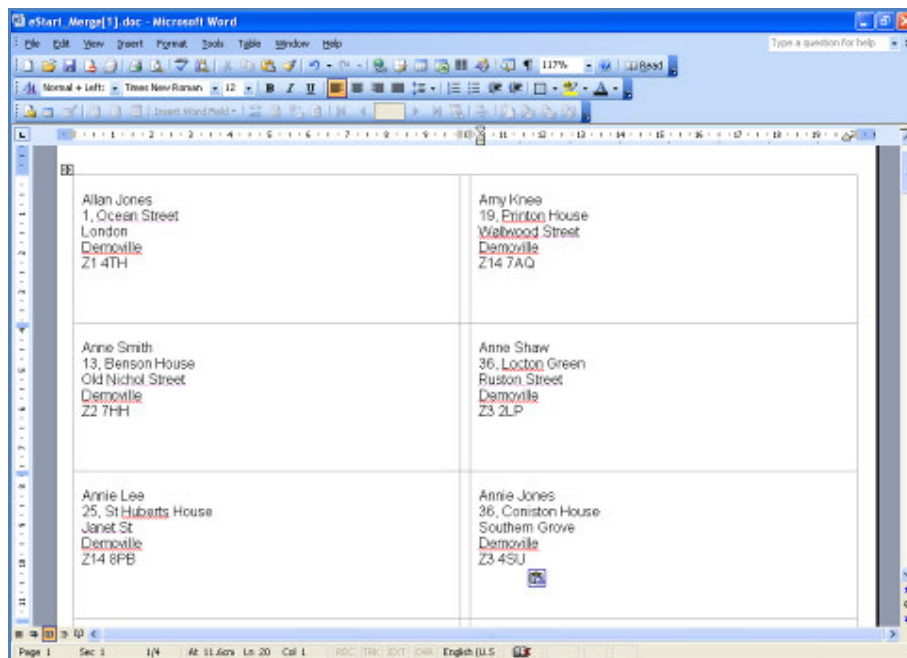
Figure 118 Mail Merge created by eStart

Email

Enter the subject and your message and click **Send**.
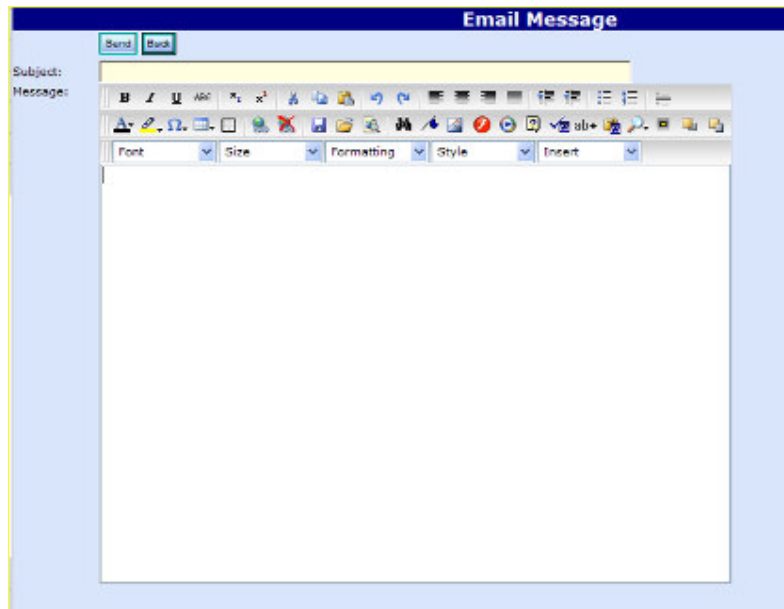
Figure 119 Creating an Email Mail Shot

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

Text Message

Enter your message and click **Send**.
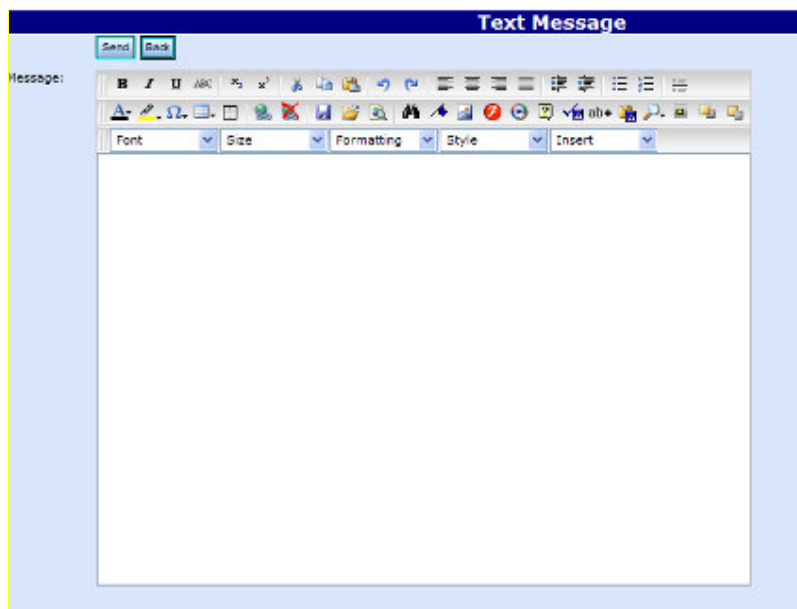
Figure 120 Creating a Text Message Mail Shot

You can edit your message before you send it, by using the toolbars. You will need to 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.

When you click the **To Excel** button you will be presented with a screen requesting you to select the fields you wish to 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.

Clicking on the **Toggle** button will select or deselect the fields.
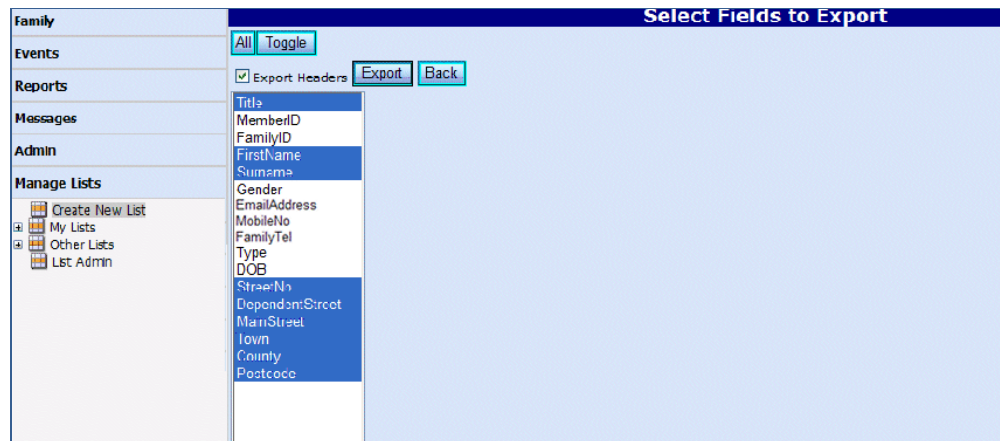
Figure 121 Selecting Fields (Headers) to Export to Excel

Once you have made your selection, click on the **Export** button. You will then be asked if you wish to **Open** or **Save**. You can select either option depending on what you want to do.
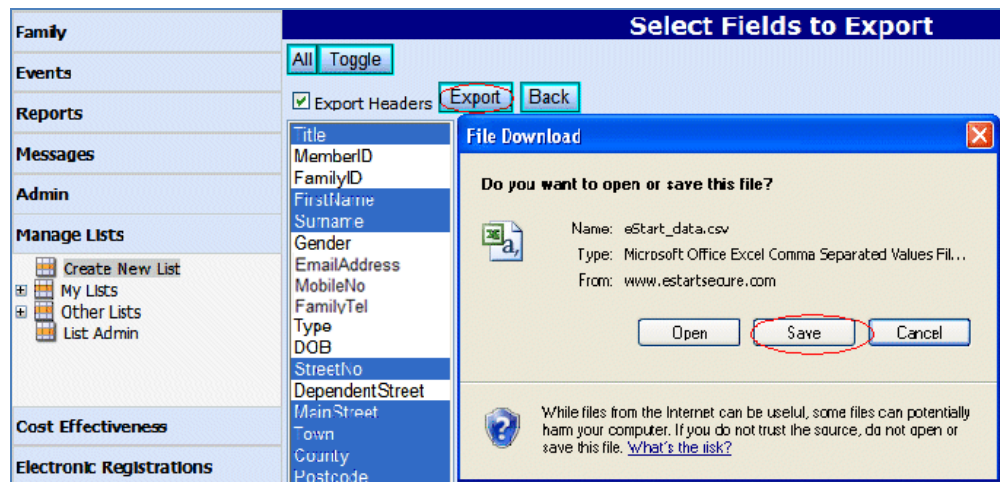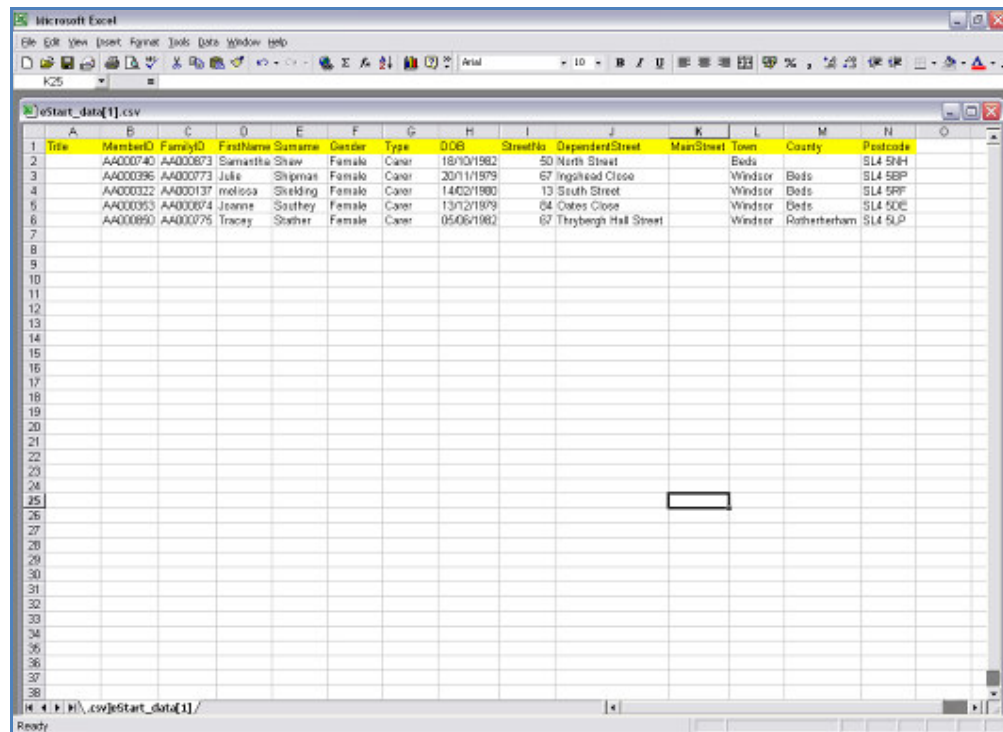
Figure 122 Confirming the export to Excel

Clicking on **Open** will export the data to Microsoft Excel.

Figure 123 eStart data exported to Excel

To CTF

Using this option you can export the list to an XML file.
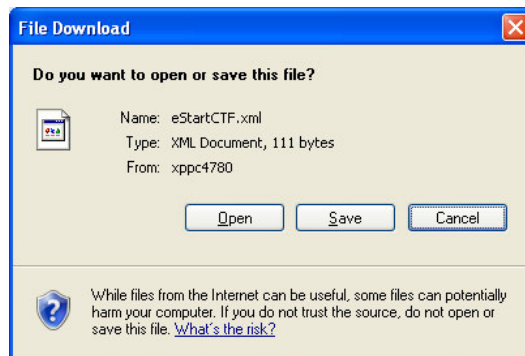
Save the file to a suitable location.

My Lists

All the lists made by you 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 appear below the Static lists). You can make any desired 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 the changes. The **Save** button will not be available for these lists.

List Admin

The **List Admin** section allows users to manage lists that they have created and saved. Click on **List Admin** in the left hand side menu.

You will see a dropdown 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 depending on what you want to do.
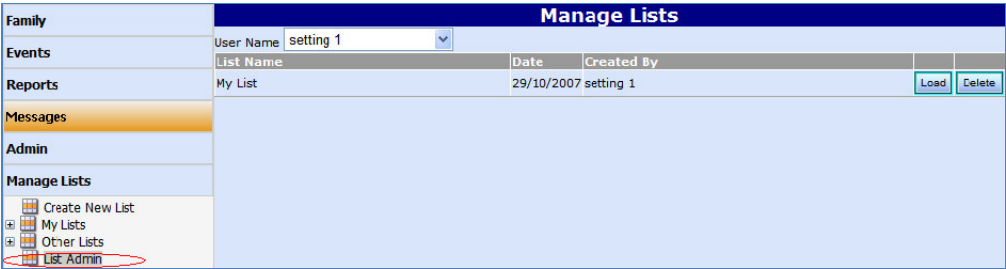
Figure 124 Manage Lists screen

Messages

Sending Messages through eStart

There are two ways of sending 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** - see page 61 onwards.

- If you wish to contact eStart users (e.g. Careworkers), the **Messages** function allows you to create and send emails and SMS/Text messages through the eStart database. Please note this is not used to contact the support desk.

The **Messages** functions are described below.

Sending an Email through eStart

Click on **Messages** in the left hand side menu, and then click on **Email**.
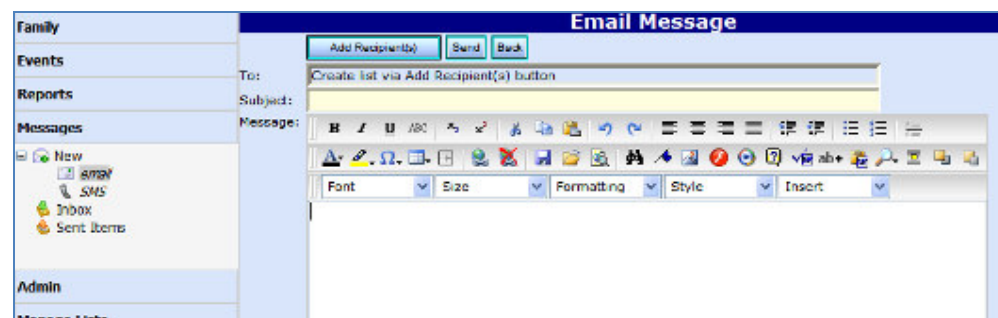
Figure 125 Sending emails through eStart

Type your message in the space provided. Enter a subject heading in the subject field and select **Add Recipient**. You can insert media files / pictures as well as edit the font size and colour. These features as well as others can be found on the toolbars above the message box.
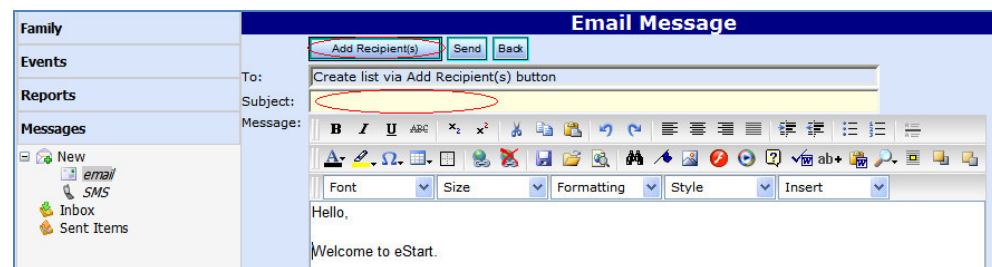
Figure 126 Email Tools

When you click the **Add Recipient** button, you will be presented with a list of names for all care workers. You can select as many recipients as you wish from this list.

To select a recipient click on **Add**. When you have finished click on **OK**.
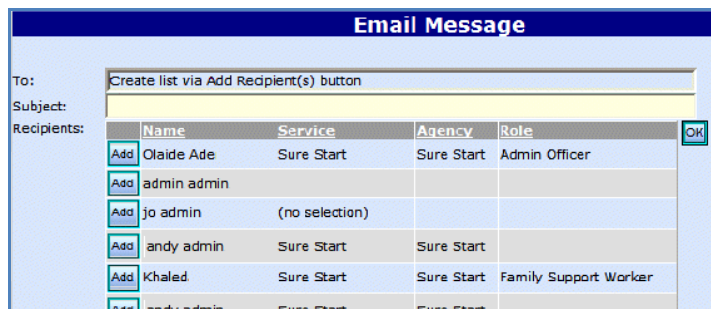
Figure 127 Selecting Email Recipients

Now click on **send**.
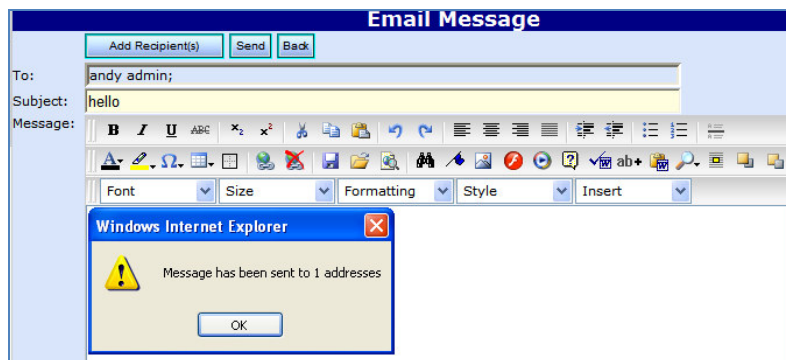
Figure 128 Email Confirmation

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

Sending an SMS Message through eStart

Administrators should contact **One** Support to activate this function.

The eStart database has an SMS feature built in to it. It allows users to send text messages to mobile phone numbers. To send an SMS, type your message in the space provided. You can also edit your message before you send it, by using the toolbars. You will need to ensure that your chosen recipient has a valid mobile phone number set-up against their user details (these can be found in Admin / **Manage Users**).
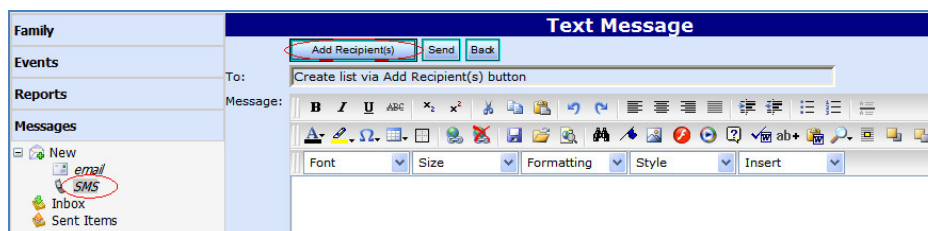
Figure 129 Sending SMS Messages through eStart

Once you have finished writing your message you will need to select a recipient by clicking on the **Add Recipient** button. You will be presented with a list of user names to select from. Make your selection and click on **OK** - please see screenshot below.
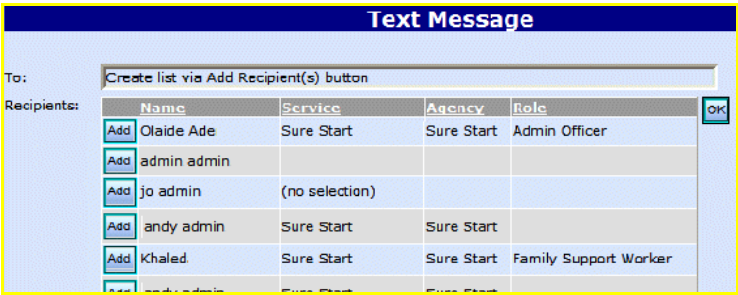
Figure 130 Selecting SMS recipients

Now click on **Send**.

You will receive a message confirmation after to say your message has been sent.
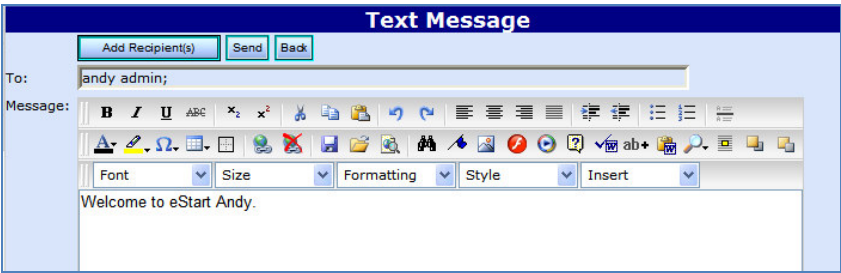
Figure 131 SMS Text Message example

Inbox

The **Inbox** is where any received messages will be stored. You can also read and delete any messages from the inbox by selecting the relevant tabs. Please see the screenshot below.

Once read, you can also reply to a message in your inbox.
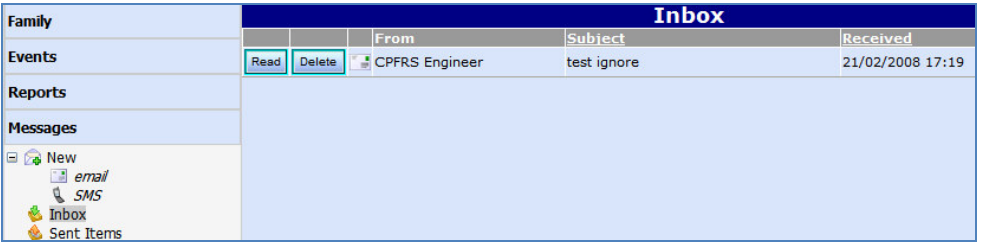
Figure 132 Message Inbox

Sent Items

Sent Items allows you to keep a record of any messages you have sent through eStart. To view a sent item you need to click on **Read**.
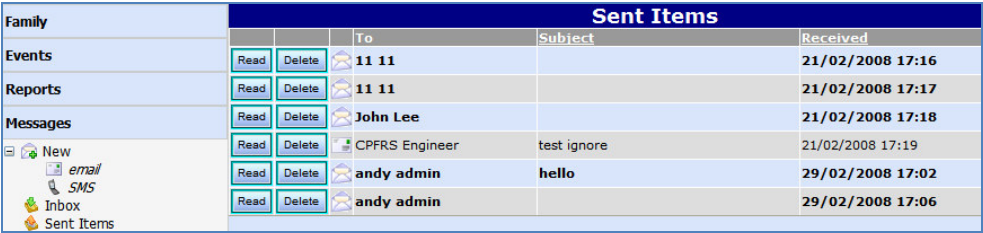
Figure 133 Messages | Sent Items

Once you have read your message, you can delete it, reply to it or alternatively go back to the inbox.
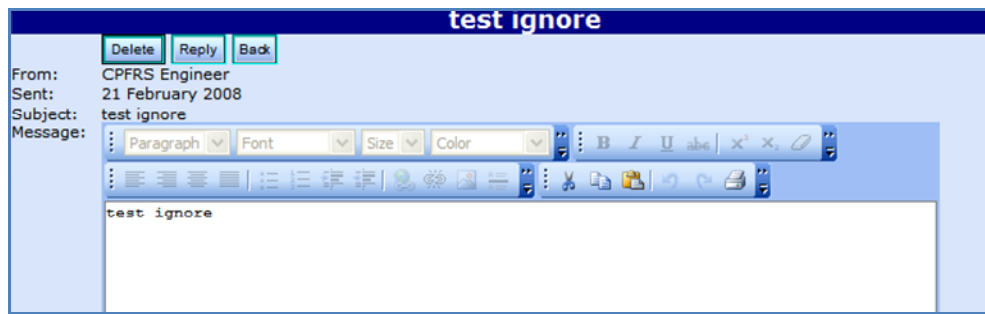
Figure 134 Message display

Add on Modules

Cost Effectiveness

The **ECM[1] Outcomes Framework** requires Local Authorities to monitor and evaluate their childcare settings and demonstrate they are delivering services to improve outcomes for Children and Young People. The **Cost Effectiveness Module** provides Authorities and settings such as Children's Centres with all the tools necessary to conduct local evaluations and report on their effectiveness and costs against local and national targets.

How to Access Cost Effectiveness

Administrators should ensure that Cost Effectiveness is set to **Full Access** for the relevant group under **Admin**, **User Groups**, **Manage User Groups**, and **Misc**.

Log into eStart and click on **Cost Effectiveness** on the left hand side of the screen. The following menu appears:
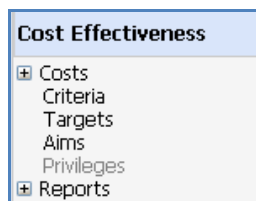
Figure 135 Cost Effectiveness menu

Costs

To configure your costs, click on the + next to Costs and click on **Resources**.

---

[1] *ECM - Every Child Matters*

Figure 136 Edit Costs

Here you can set your Costs, Criteria, Targets and Aims.

On the left pane, click on **Staff**. Click **Edit Costs** on the right, and then **Add** to add in your staff costs.

You will see a window similar to this:

Figure 137 Setting staff cost

Criteria, Targets and Aims

Click **Criteria** , **Target** or **Aims** in the left pane. The right hand screen will then list all the Criteria, Target or Aims items as appropriate. Click **Edit** on the right to edit the name of the item or reset the item to Local or National or both.

Figure 138 Criteria

Reports

Choose **Staff** or **Criteria**, select your reporting options and click **Run**.

The report is displayed. Use the Crystal bar to export, print, change page or search the results. See **Report Toolbar** on page 91.

Figure 139 Cost Report

SEF Builder

Every centre should have their own assigned Self Evaluation Form (SEF).

SEFs are created via templates. Templates define the layout and questions that make up the forms and are reusable. The actual form created from a template is the **SEF**. Many SEFs may use a single template.
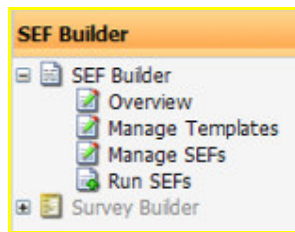
Figure 140 SEF Builder Menu

Manage Templates

Any authorised users can maintain Templates using the **Manage Templates** menu under the SEF Builder menu.

Selecting the Manage Template menu will list the existing Templates in a grid:
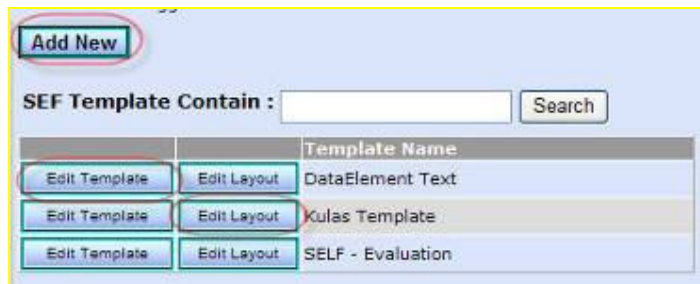
Figure 141 SEF Existing Templates Grid

You can rename an existing Template clicking the corresponding **Edit Template** button.

You can update the layout of the Form/ questionnaire by clicking the corresponding **Edit Layout** button.

Click the **Add New** button display the following screen to add a New Template:

Figure 142 SEF Template Name

You can enter your preferred template Name and click the **Save Button** to create a new empty template.

Build or Update a Template

Clicking an **Edit Layout** button will display the following screen, with details relevant to the template you have selected:

Figure 143 SEF Edit layout screen

The SEF Builder allows you to build a cover sheet, introduction section and up to ten sections (A - J). The sections are where you will build your questions.
Each question should have an answer type i.e. a text box, radio buttons, check buttons or allow you to insert an existing 'DataElement' selectable from the **Question Type** box.

You can introduce a page break by typing **<#PageBreak#>** which will cause a break onto a new page on printing.

Make sure you click Save.

Manage SEFs

A **SEF** is the Actual Form created from the template. Many SEFs may use a single template.

e.g. If you have a template named Customer Feedback you may create forms titled Customer Feedback 2008 and Customer Feedback 2009 from the Customer Feedback Template.

Any authorised users can manage SEFs using the **Manage SEFs** option under the SEF Builder menu.

Create or Update a SEF

When you click on Manage SEFs, the main window lists the existing SEFs in a grid as follows:

Figure 144 Adding a New SEF

The name and dates of an existing SEF can be modified by choosing the corresponding **Rename** button, which displays the following:
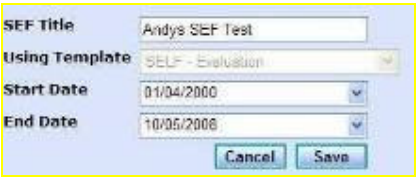
Figure 145 Edit SEF

⚠ You **cannot** change the assigned Template at later stage. If you have just added a new SEF you will not be able to rename it or change the dates until you have logged out of eStart and logged back in again.

A new SEF can be added by clicking the **Add New** button to display the following:
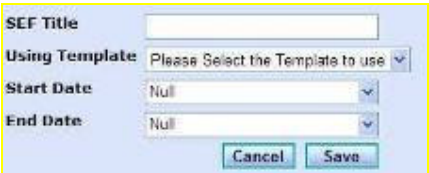
Figure 146 New SEF

Enter the SEF title, choose the template to use and select the start and end dates. Click the **Save** button to create your new SEF.

Run SEFs

Any authorised users can access SEFs from the **Run SEFs** option under the SEF Builder menu.

Selecting Run SEFs will display the following:
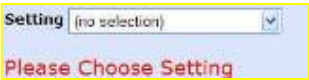
Figure 147 Choosing a SEF Setting

Select the setting from the **Setting** drop down. This will display all the SEFs available for the selected centre as below.

Figure 148 Run SEF for Selected Setting

Clicking the **Run SEF** button allows you to complete the SEF for the selected centre as follows:

Figure 149 SEF Printed Version

You may create a printed version by clicking the **Print** button. To get a clean copy **remove the Header and Footer** from your **browsers Page Setup**.

Reports

Reports Overview

The Reports section within eStart provides a method to produce a wide variety of reports to suit your needs. The Reports menu can be found on the left hand side of eStart.
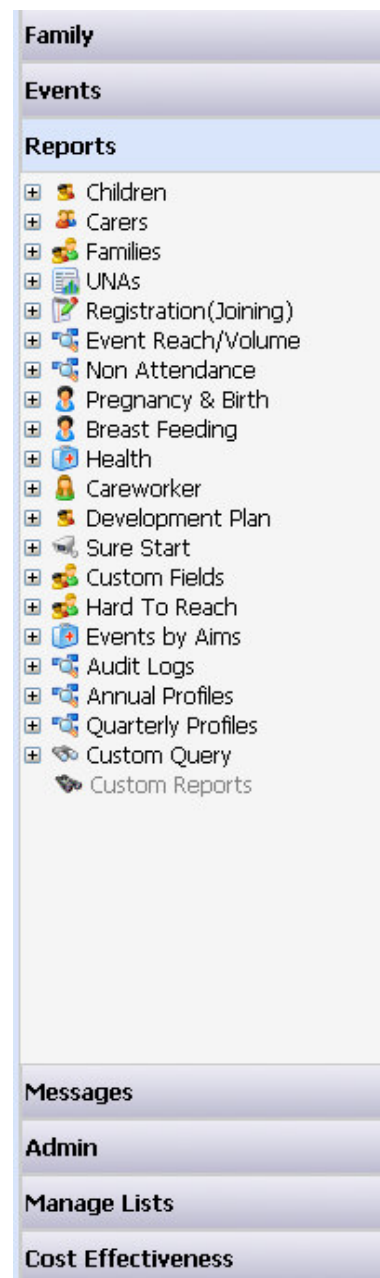
Figure 150 Reports tree view menu

For descriptions of all the eStart Reports please see **Appendix B: eStart Reports - Extended Descriptions** on page 93.

Types of Report

There are two kinds of reports.

Reach

The output is determined on an individual count, e.g. if an individual is seen at an event six times, attended six different events or three events twice each, they will only be counted once this will be shown as 1.

Event Details **are not** included in Reach reports since the details will not match the numbers of people attending.

Volume

The output is determined on the amount of times an individual appears, e.g. if an individual is seen at an event six times, attended six different events or three events twice each, this will be counted 6 times.

Event Details **are** included in Volume reports since showing the details of these reports will match the number of people attending.

Children Reports

Children Seen (Reach)	Children seen between dates (No details on events)
Children Seen (Volume)	Children seen between dates (With details on events)
Children Seen By Age (Reach)	Children seen between dates grouped by Age Range (No details about events)
Children Seen By Age (Volume)	Children seen between dates grouped by Age Range (With details about events)
Children Seen By Activity (Reach)	Children seen between dates grouped by Activities (No details on events)
Children Seen By Activity (Volume)	Children seen between dates grouped by Activities (With details on events)
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 registered, only includes active members
Children Now Registered By Ethnicity	Children registered grouped by Ethnicity (Active members only)
Children Now Registered By Disability & Special Needs	Children that are registered with a Disability or Special Needs (Active members only)
Births of Children	Shows birthdays, weights and names of children born within date range
Births of Children by Weight	Births of children grouped by weight, born between date range

Carer Reports

Carers Seen (Reach)	Carers seen between dates (No details on events)
Carers Seen (Volume)	Carers seen between dates (With details on events)
Carers Seen By Activity (Reach)	Carers seen between dates grouped by Activities (No details on events)
Carers seen By Activity (Volume)	Carers seen between dates grouped by Activities (With details on events)
Carers seen By Activity With Anonymous	Carers seen between dates, grouped by Setting and Events. The total number of Anonymous Carers attending each event is also shown. Both Active and Inactive Carers are included.
Carers Now Registered	Carers registered, only includes active members

Family Reports

Monthly Summary Members Seen (Reach)	Monthly Summary of Carers & Children Seen grouped by Activity (counting each member once per Activity).
Monthly Summary Members Seen (Volume)	Monthly Summary of Carers & Children Seen grouped by Activity (counting each attendance at Activity).
Families Now Registered	This shows Families currently Registered (only active families shown)
Mail Merge Families Registered	Mail Merge Families Registered
Summary of Members Seen (Reach)	Summary of Families Carers and Children Seen Grouped by Activity (Counting each Family, Carer child once for each activity).
Families Seen(Reach)	Families Seen between dates no details about Events.

| Summary of Members Seen (Volume) | Summary of Families Carers and Children Seen Grouped by Activity (Counting each attendance). |

UNA Reports- not used

UNA	The latest assessment for each member of each family.
UNA of Family by SCI Scores	This report displays the most recent UNA and the SCI related Items. The naming of the Score Type needs to include **SCI** for the SCI Classification of each UNA to be displayed.
UNA Blank Form	This report displays all the UNA Question Items with the information of the Family and Members at the header of the report. Enter a valid Family ID and select **Blank Form** to see this report.
UNA by SCI Scores	This report shows the scores of the SCI Score Type for each UNA Carer. The naming of the Score Type needs to include **SCI** and Score Type Details will need to be entered for this report to be displayed.
UNA by Smoking Scores	This report shows the scores of the Smoking (Nicotine Dependency) Score Type for each UNA carer. The naming of the Score Type needs to include the word **Nicotine**. Score Type Details also need to be entered for this report to be displayed.
UNA Score Types	This report shows UNA Score Types with the scores of the registered members grouped by Family ID.
Completed UNAs	This report shows completed UNAs by registered members grouped by Template Type and Family ID. There is an option to view it in Summary format.
UNA Items	This report shows selected UNA Items by registered members grouped by Template Type & UNA Items. There is an option to view it in Summary format.
UNA Items by Carers with %	This report displays the number of carers who have answered the UNA Item and includes a percentage of all the UNA carers in the authority. The Date Range is the UNA Created Date. It also includes several Summary Tables.
UNA Members with >3 Addresses	This report records all members with either a child or carer UNA, who have moved address. This is logged when the Change Address option is selected under the Family Details and will only include the Family Address. The Move Date needs to be selected when entering a new address as this report will only pick up address changes with a Moving In date. The report is grouped by Registered at Setting then sorted by age.

💡 For detailed descriptions of all the UNA Reports please see **Appendix A: UNA Report Descriptions** on page 93.

Registration Reports

Carers Joining	Shows Carers who joined between dates Active and non Active Carers shown).
Children Joining	Shows Children who joined between dates (Active and non Active Children shown). All Children displayed in this report must have a DOB entered.
Carers And Children Joining	Shows Carers And Children who Joined between dates (Active and non Active members shown).
Families Joining	Shows Families who joined between dates (Active and non Active Families shown).

Event Reach/Volume Reports

Events Outcome	Shows the Outcome of Events Occurring between dates.
Events(Reach)	Shows the members who attended Events between dates (without details about individual Events).
Events(Reach) by Ethnicity	Shows the members who attended Events between dates grouped by ethnicity (without details about individual Events).
Events(Reach) By Activity	Shows the members who attended Events between dates grouped by Activity (without details about individual Events).
Events(Volume)	Shows the members who attended Events between (with details about individual Events).
Events(Volume) By Activity	Shows the members who attended Events between dates grouped by Activity (with details about individual Events).
Events By Activity With Anonymous	Members seen between dates, grouped by Setting and Events. The total number of Anonymous Members attending each Activity is also shown. Both Active and Inactive Members are included.
Members Seen by Ethnicity	Ethnic Group Reach and Volume totals, including Percentages, by Setting and Area. Both Active and Inactive Members are included.
Provider with Events (Basic)	Reach Totals for Members and Families for Events, by Setting and Provider. Both Active and Inactive Members are included.
Provider with Events (Detailed)	Reach Totals for Members and Families for Events, by Setting, Provider and Family. Both Active and Inactive Members are included.
Members Seen by Provider	Reach, Volume and Anonymous Volume totals showing 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 showing 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

Carers Not seen	Shows carers not seen between dates (Active carers only).
Children Not Seen	Shows children not seen between dates (Active children only).
Appointments Missed	Report shows members and the events that they have missed, by Setting and between Dates. Both Active and Inactive Members are included.
Mothers Not Seen	Mothers Not Seen during first two months after a birth (that occurred between dates).

Pregnancy and Birth Reports

Pregnant Teenager Now Registered	Pregnant Teenagers Now registered (Active teenagers only).
Pregnant Women Seen (Reached)	Pregnant Women seen between dates (no details about Events). Both Active and Inactive Women are included.
Births of Children	Shows birthdays, weights and names of children born within date range
Births of Children by Weight	Births of children grouped by weight, born between date range

Breast Feeding Reports

Records Of Breast Feeding	Shows the breast feeding of children in their first year (includes all children born between date range who have active Mothers)

Health Reports- no in use

Smoking Records	Shows birthdays, weights and names of children born within date range
Births of Children by Weight	Shows the smoking of carers (only includes those who are still Active and who have smoked).

Care Worker Reports

Care Workers and Events Summary(Reach)	Shows the number of different members who Visit each Care worker between dates.
Care Workers and Events Summary(Volume)	Shows the number of Visits that each Care Worker has between defined dates.
Care Workers and Events(Reach)	Shows Care Workers and members attending their Events between dates (No details about events shown).
Care Workers and Events(volume)	Shows Care Workers, their Events and members attending between dates (details about Events shown).
Care Workers and Hours worked at Events	Shows the duration in Hours and Minutes, Care Workers have worked at Events

Development Plan Reports- not used

Dev Plans & Due Dates	Shows the Development Plan Milestones and whether the Target Dates have been met, including Late Reasons. This report contains 2 Summary Tables.
Care Workers Working with Dev Plan Targets	Shows the Development Plan Milestones and their Due Dates handled by Care Workers.

Sure Start Reports- not used

M3 (Registered at requested Settings)	Sure Start monthly government report giving data on children, pregnant women and babies who are Registered at requested Settings.
M3 (Seen at requested Settings)	Sure Start monthly government report giving data on children and pregnant women who are Seen at requested Settings.
M7	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

Custom Reports	Show Custom fields (or Labels) with members.

Hard To Reach Reports

Hard To Reach Reports	Shows Hard to Reach fields (or Labels) with members.

Events by Aims Reports

Event Type	Shows the Event Group and Description by Setting, grouped by the Event Aim. Both Active and Inactive Members are included.
Children Reach	Report shows Children reached by Event Aim and Setting. Both Active and Inactive Members are included.
Children Volume	Report shows Children volumes by Event Aim and Setting. Both Active and Inactive Members are included.

Audit Logs- Local Authority use

Audit Log	This report shows the records audited by Users through the Family screens. It also lists the access attempts of Family IDs. ONLY Manage Console Users can run this report.

Quarterly Profiles

Quarterly Profile Main	Shows high level Reach and Volume Members Seen totals, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.
Quarterly Profile Outcomes	Shows high level Reach and Volume Members Seen totals, by Outcome Types and Individual Outcomes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.
Quarterly Profile Themes	Shows high level Reach and Volume Members Seen totals, by Themes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

Custom Query Report

Holds all the custom reports that are created by the Capita helpdesk. These reports are created on request.

Report Criteria

Once a report has been selected you then need to select the criteria for the report as in the example below:

Figure 151 Report Criteria.

Seen At Setting/Affiliated

Filters the report to a particular setting or range of settings where the family is registered. Some reports allow you to select the settings affiliated to families.- Cumbria does not use affiliations.

Living At

This option provides the facility to filter the report to families living in a certain Setting, Post Area, Super Output and Custom Area.

Date Range

Provides the facility to limit the report results to a specified date range.

Disability, Ethnicity, Sex, Age and Member ID

Filter the report by selecting any of the above criteria.

Activities

This allows you to filter the report to a particular Event, Event Reporting Group and Groups.

When any of the button options are selected a new box appears showing the selection parameters. These will be filtered to the chosen setting.

Running a Report

There are three options available when running a report:

Run
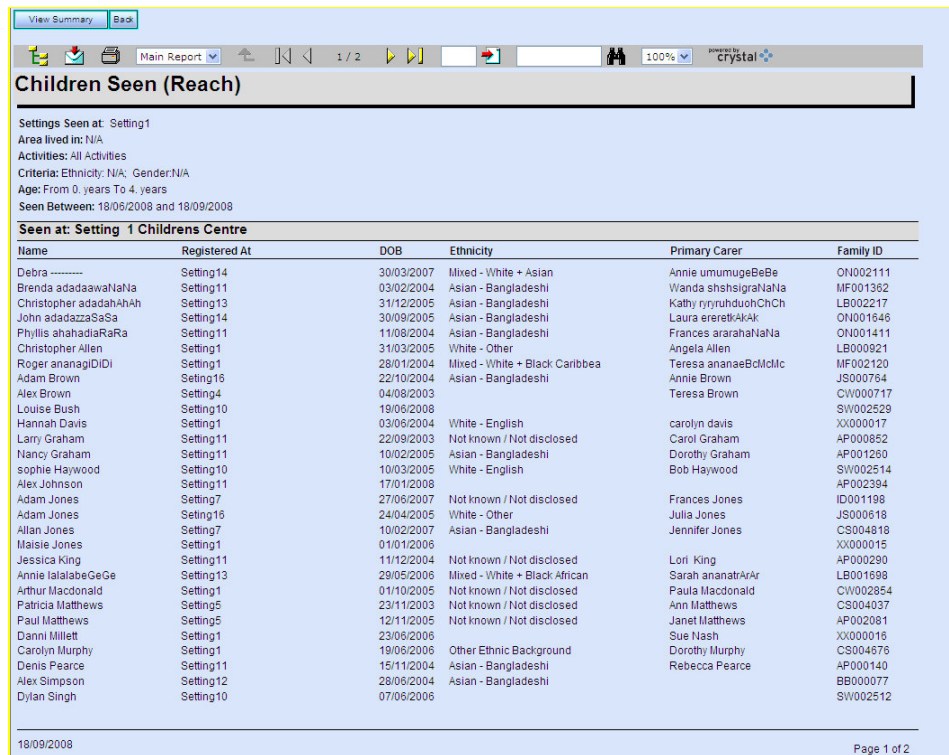
This runs the report; an output will be produced from your parameters.

Export to Excel

The report will be exported in .csv (Comma Separated Values) to Microsoft Excel.

Summary

If you select the summary option eStart will only return the Summary section of the report.

Figure 152 Reports Summary screen.

Report Toolbar

Figure 153 Reports Toolbar.

The reports toolbar allows you to further manipulate results. The toolbar allows report data to be exported to various formats, print reports and search through records.

	Shows and hides group trees
	Export data to different formats
	Print the report
	Navigate through pages or jump to a page
	Search for a record
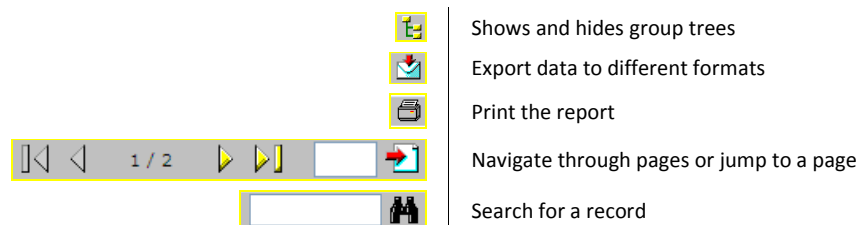
Figure 154 Reports Toolbar Icons.

Exporting a Report

This function allows the report to be exported in the following formats:

- Crystal Reports (RPT)
- Acrobat Format (PDF)
- MS Word
- MS Excel 97-2000
- MS Excel 97-2000 (Data Only) only data is extracted, formatting is dropped.
- Rich Text Format
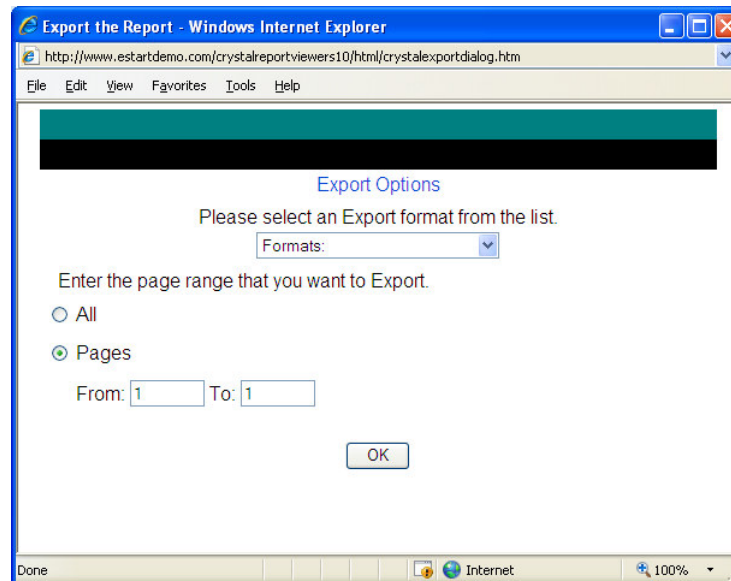
Figure 155 Reports Export Options screen.

Appendix A: eStart Reports - Extended Descriptions

Reach and Volume Reports

Some reports will have the same report name but differ by being labelled as **Reach** or **Volume**.

- A **Reach** report counts an individual Member or Family once e.g. if a child attended Tumble Tots Event every week over 6 weeks at Setting 1 and Story Time twice at Setting 2, it will be counted as 1 Child for each Setting as well as only 1 Child for the two Settings in total. The Main Total of the Summary Table will not add up for the Reach reports. Event Details **are not** included in Reach reports since the details will not match the numbers of people attending (e.g. they attended two events but are only counted once).

- A **Volume** report would count 6 for Setting 1 and 2 for Setting 2 in the example above. For the two Settings, the Volume count would be 8. The subtotal and total in a Volume count Summary Table will add up logically. Event Details **are** included in Volume reports since showing the details of these reports will match the number of people attending.

Children Category

Children Seen (Reach) Report

This report shows the individual numbers of children seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting. It does not include information on the Event Activities attended. Both Active and Inactive children are displayed.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Disabled
- Ethnicity
- Gender
- Age (by year or month) set to 0 – 4 years by default
- Member ID
- Consent Given
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

A Summary Table of Children Seen from the selected Settings is included in this report.

An Area based Summary Table can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the Main Total could vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total.

Children Seen (Volume) Report

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting. It does not include information on the Event Activities attended but it does show the Event Date. Both Active and Inactive children are displayed.

The report options are the same as the children Seen (Reach) Report above.

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

Children Seen by Age (Reach) Report

This report shows the individual numbers of children seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Age. It does not include information on the Event Activities attended. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen, if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. The Main Total could, therefore, vary from manually adding up the subtotals.

Children Seen by Age (Volume) Report

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Age. It does not include information on the Event Activities attended but it does show the Event Date. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and Bar chart is included with this report.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for **Living At**.

Children Seen by Activity (Reach) Report

This report shows the individual numbers of children seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Event Activity. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and Bar chart is included with this report and displays a Reach subtotal for each Activity.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number could vary from manually adding up the subtotals. A Setting based Summary Table and bar chart is included with this report and it displays a Reach subtotal for each Activity.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for **Living At**.

Children Seen by Activity (Volume) Report

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Event Activity. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and bar chart is included with this report and it displays a Volume subtotal for each Activity.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table count of the times a Child member has been seen for each Activity at a Setting or Area.

Children Seen by Activity with Anonymous Report (Volume)

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Event Activity. Both Active and Inactive children are being displayed.

The report options are:

- Seen at Setting
- Event Date Range
- Gender
- Activities

This report also shows the numbers of Anonymous Children Seen at the Event Activity.

A Setting based Summary Table is included in this report and counts the number of times children have attended each event.

Children Now Registered Report

This report gives a list of children registered in the selected Settings from the date the report is run. A child's information will only show if both the Child <u>and</u> the Family are currently active.

It is grouped by Living at (if this option has been selected), and then Registered at Setting.

Contact Address Information with Contact Numbers can be seen with the Child information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The name of the Carer will be next to the Address if a Primary Carer has been set up for the Child, otherwise the name of the Child will appear next to it.

The report options are:

- Registered at Setting

- Affiliated

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Disabled

- Ethnicity

- Gender

- Age (by year or month) – set to 0 – 4 years by default

- Consent Given

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

The Total of each Setting is a Reach count of each Child, therefore if a Child's Family is affiliated to two other Settings, then it will still be counted as 1 Child for the Total that represents ALL Settings.

Children Registered by Ethnicity Report

This report gives a list of children registered by Ethnicity in the selected Settings from the date the report is run. A child's information will only show if both the Child <u>and</u> the Family are currently active.

The report options are the same as for the Children Now Registered Report, above.

It is grouped by Living at (if this option has been selected), and then Registered at Setting followed by Ethnicity.

Contact Address Information with Contact Numbers can be seen with the Child information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The name of the Carer will be next to the Address if a Primary Carer has been set up for the Child, otherwise the name of the Child will appear next to it.

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area. Hence, the number can vary from manually adding up the subtotals. The totals are a count

of Children by Ethnicity and Setting/Living At. If a Child's Family is affiliated to two other Settings then it will still be counted as 1 Child for the Total that represents ALL Settings.

Children Registered by Disability & Special Needs Report

This report gives a list of children registered by Disability and Special Needs in the selected Setting/Settings from the date the report is run. A child's information will only show if both the Child <u>and</u> the Family are currently active.

It is grouped by Living at (if this option has been selected), and then Registered at Setting followed by Disability and Special Needs.

Contact Address Information with Contact Numbers can be seen with the Child information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The name of the Carer will be next to the Address if a Primary Carer has been set up for the Child, otherwise the name of the Child will appear next to it.

The report options are the same as for the Children Now Registered Report.

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area, hence the number can vary from manually adding up the subtotals. The Total of each Setting is a Reach count of each Child, so if a Child's Family is affiliated to two other Settings then it will still be counted as 1 Child for the Total that represents ALL Settings.

Birth of Children Report

This report displays children born between the chosen Date Ranges of the Registered Setting. It shows all Active and Inactive Children where the Family status is **Active**.

It is grouped by Living at (if this option has been selected), and then Registered at Setting. Fields such as Birth weight, Gender, Ethnicity and Primary Carer of Child can also be seen should there be data for the particular child.

The report options are:

- Registered at Setting
- Living at
- Disability
- Gender
- Ethnicity

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen, if one of the options has been selected for **Living At**.

Child Birth Weight Report- not used

This report shows the Children born within the chosen Date Range. It shows all Active and Inactive Children where the Family status is **Active**.

It is grouped by Living at (if this option has been selected), and then Registered at Setting followed by the Birth weight range. Fields such as Birth weight, Gender, Ethnicity and Primary Carer of Child can also be seen should there be data for the particular child.

The report options of this report are the same as for the Birth of Children report, above.

Carers Category

Carers Seen (Reach) Report

This report shows individual number of Carers seen at the selected Children's Centre Settings within the chosen Event Date Range. Both Active and Inactive Carers who have attended an Event Activity are displayed.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

It does not include information on the Event Activities attended.

The Contact Address Information with Contact Numbers can be seen with the Carer information, if the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report options are:

- Seen at Setting

- Living at: Setting/Postal Area/Super Output Area/Custom Label

- Date Range (set against the Event Start and End Date)

- Disabled

- Ethnicity

- Gender

- Relationship to Child

- Teenager (less than 20 years at Event Date)

- Parent

- Lone Parent

- Currently Smoking

- Pregnant

- Consent Given

- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

A Summary Table of Carers Seen from the Registered Settings is included in this report.

An Area Summary Table can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total of all selected Settings.

Carers Seen (Volume) Report

This report shows the number of times Carers have been seen at the selected Children's Centre Settings within the chosen Event Date Range. Both Active and Inactive Carers are displayed.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

It does not include information on the Event Activities attended but it does show the Event Date.

The report options are the same as for the Carers Seen (Reach) Report.

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for Living At.

Carers Seen by Activity (Reach) Report

This report shows the individual number of Carers seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activity. Both Active and Inactive Carers are displayed.

The report options are the same as for the Carers Seen (Reach) Report.

A Setting based Summary Table and Bar Chart are included with this report, displaying a Reach subtotal.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

Carers Seen by Activity (Volume) Report

This report shows the number of times Carers have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activity. Both Active and Inactive Carers are displayed.

The report options are the same as for the Carers Seen (Reach) Report.

A Setting based Summary Table and bar chart are included with this report, displaying a Volume subtotal for each Activity.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for Living At.

The main total of the Summary Table is a count of the times a Child member has been seen for each Activity at a Setting or Area.

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Carers Seen by Activity with Anonymous Report

This report shows the number of times Carers have been seen at the selected Children's Centre Settings within the chosen Event Date Range. This report also shows the numbers of Anonymous Carers seen at the Event Activity. Both Active and Inactive Carers are displayed.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activity.

The report options are:

- Seen at Setting
- Event Date Range
- Gender
- Activities

A Setting based Summary Table is included in this report and counts the number of times Carers have attended each event. This is a Volume count.

Carers Now Registered Report

This report gives a list of Carers registered in the selected Settings from the date the report is run. The information of a Carer will only show if both the Carer and the Family are currently active.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Consent Given
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking
- Pregnant
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

Contact Address Information with Contact Numbers can be seen with the Carer information if the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option shows only the Contact Address information.

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual Carer at a Setting or Area. Hence the number can vary from manually adding up the subtotals. The Total of each Setting gives a Reach count of each Carer. If a Carer's Family is affiliated to two other Settings, then it will still be counted as one Carer for the Total, representing ALL Settings.

Families Category

Families Seen (Reach) Report

This report shows a count of individual Families having attended an Event Activity at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting. It does not include information on the Event Activities attended. Both Active and Inactive Families are displayed.

The report options are:

- Seen at Setting

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Date Range (defined by Event Start and End Date)

- Disabled

- Ethnicity

- Employed

- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

A Summary Table of Families Seen from the selected Settings is included in this report.

An Area Summary Table can also be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual family at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total.

The Address Contact Information can either be selected with the Family Information or as a Mail Merge on its own.

Families Seen (Volume) Report

This report shows the number of times Families have attended Events at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting. It does not include information on the Event Activities attended but it does show the Event Date. Both Active and Inactive families are displayed.

The report options are the same as for the Families Seen (Reach) report.

A Setting based Summary Table and bar chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The Address Contact Information can be selected either with the Family Information or as Mail Merge on its own.

Families Now Registered Report

This report gives a list of Families registered in the selected Setting/Settings from the date the report is run. The information of the Main Carer will only show with the Children of that Family. The Members as well as the Family have to be active.

It is grouped by Living at, if it has been chosen, and then Registered at Setting.

The Disabled, Ethnicity and Consent Given options are also available to be selected before running the report. All Family Members have to have been set to **No Consent Given** before this Family is seen as not having given Consent.

Contact Address Information with Contact Numbers can be seen with the Main Carer information if the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option shows only the Contact Address information.

A Setting based Summary Table and Bar chart is included with this report.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual Family at a Setting or Area, hence, the number can vary from manually adding up the subtotals.

The Total of each Setting is a Reach count of each Family. If a Family is affiliated to two other Settings, then it will still be counted as one Family for the total that represents ALL Settings.

Mail Merge Families Registered

This report will output directly a Mail Merge list Family Addresses with Contact Number Information as well as the Family IDs.

The Family has to have an Active status.

The Carer Name shown will be the one that has been set as the Main Correspondent. The Consent Given depends only on this Carer, hence not all Family Members need to have withheld their consent in order for this Family to be displayed when the **No Consent Given** option is selected. The title will also show which Consent Given option has been selected before running the report.

The report options are the same as for the Families Now Registered report, although due to the fact that it is a Mail Merge report, it does not group on Living at or Registered at Settings.

Monthly Summary Members Seen (Reach) Report

This report displays the number of individual Carers and Children Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers & Children, with Active or Inactive Family status, are being displayed.

The report is first grouped by Living At, should it have been selected, then by Seen at Setting.

The report options are:

- Seen at Setting

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Date Range (set against the Event Start and End Date)

- Disabled

- Ethnicity

- Activities

The count of each individual Member seen at the Event Activity is by each month. If the same Member has attended (for example) three Activities in the Setting, then as a Reach count that Member will only be counted as one Member reached in that Month's total.

Monthly Summary Members Seen (Volume) Report

This report displays the number of Carers and Children Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers & Children, with Active or Inactive Family status, are displayed.

The report is first grouped by Living At, should it have been selected, then by Seen at Setting.

The report options are the same as for the Monthly Summary Members Seen (Reach) report.

The number of times the member has been seen at each Event Activity is counted and displayed by each month in the Summary Table. For example, a Child attending two different Event Activities over three weeks in one month would be counted as six. This is a Volume count.

All Members have to have attended an Event and both active and non active members can be seen.

Summary Members Seen (Reach) Report

This report displays the number of individual Carers, Children and Families Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers & Children, with Active or Inactive Family status, are displayed.

The report is first grouped by Living At (if it has been selected), then by Seen at Setting.

The report options are the same as for the Monthly Summary Members Seen (Reach) report.

The Summary table shows the number of individual Carers, Children and Families who have been seen at each Event Activity. If the same Member has attended (for example) three different Event Activities over several weeks in the Setting, then as a Reach count that Member will only be counted as one Member reached for the Main Total.

All Members or Families have to have attended an Event and both active and non active members and families can be seen here.

Summary Members Seen (Volume) Report

This report displays the number of Carers and Children Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers and Children, with Active or Inactive Family status, are displayed. All Members or Families need to have attended an Event

The report is first grouped by Living At (if it has been selected), then by Seen at Setting.

The report options are the same as for the Monthly Summary Members Seen (Reach) report.

The Summary table shows the number of individual Carers, Children and Families that have been seen at each Event Activity. The number of times a Family has been seen at each Event Activity is counted in the Summary Table. For example, a Family attending two different Event Activities over three weeks in one month would be six. This is a Volume count.

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Registration (Joining) Category

Families Joining Report

The Families Joined report shows the Families who have joined the Setting within the Date Range. Both active and inactive Families will appear in this report.

If the name of the mother and surname of the Primary Carer have been added for the Family, these will be included. Otherwise this will be blank. The number of Children within that Family will also be displayed.

Contact Address Information with Contact Numbers but without any Contact Name can be seen, when the Yes radio button has been selected for Contact Info.

The report options are:

- Registered at Setting

- Living at: Setting/Postal Area/Super Output Area/Custom Label

- Date Range (set against the Family Joined Start and End Date)

- Disabled

- Ethnicity

A Summary Table of the Families Joined from the chosen Registered Settings is included in this report.

An Area Summary Table can be seen if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual family at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Carers & Children Joining Report

The Carers and Children Joining report shows the Members who have joined the Setting within the Date Range. Active and inactive Members from active or inactive Families will appear in this report.

A Member Type column allows you to distinguish between Carers and Children. Carers or Children will appear in this report even if they have not filled in their Date of Birth.

The report options are:

- Registered at Setting

- Living at: Setting/Postal Area/Super Output Area/Custom Label

- Date Range (set against the Family Joined Start and End Date)

- Disabled

- Ethnicity

- Gender

A Summary Table of the Carers and Children joined from the chosen Registered Settings is included in this report.

An Area Summary Table can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Carers Joining Report

The Carers Joined report shows the Carers who have joined the Setting within the Date Range. Active and inactive Carers from active or inactive Families will appear in this report.

Carers will appear in this report even though they may not have filled in their Date of Birth, unless the Teenager report option has been selected before running.

Contact Address Information with Contact Numbers but without any Contact Name can be seen, when the **Yes** radio button has been selected for Contact Info.

The report options are:

- Seen at Setting

- Living at: Setting/Postal Area/Super Output Area/Custom Label

- Date Range (set against the Start and End Date)

- Disabled

- Ethnicity

- Gender

- Relationship to Child

- Teenager (less than 20 years at Event Date)

- Parent

- Lone Parent

- Currently Smoking

- Pregnant

A Summary Table of the Carers joined from the chosen Registered Settings is included in this report.

An Area Summary Table can also be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual Carer at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Children Joining Report

The Children Joined report shows the Children who have joined the Setting within the Date Range. Active and inactive Children with an active or inactive Family status will appear in this report.

Children will **not** appear in this report if their Date of Birth has not been entered.

The report options are:

- Seen at Setting

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Date Range (set against the Start and End Date)

- Disabled

- Ethnicity

- Gender

- Age (by year or month) set to 0 – 4 years by default

A Summary Table of the Children joined from the chosen Registered Settings is included in this report.

An Area Summary Table can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Event Reach/Volume Category

Events (Reach) Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen dates.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting. It does not include information on the Event Activities attended.

Both Active and inactive Members within active and inactive Families are displayed in this report.

The report options are:

- Seen at Setting

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Date Range (set against the Event Start and End Date)

- Disabled

- Ethnicity

- Gender

- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

Summary Tables of Members Seen at Events from the selected Settings are included in this report.

The first Summary Table is grouped as rows by Event Months and then Member Type with the Seen at Setting set as columns.

A second Summary Table, based on Area, can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number could vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Total of ALL Settings.

Events (Volume) Report

This report shows the number of times Members have attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. Both Active and inactive Members within active and inactive Families are displayed in this report. It does not include information on the Event Activities attended.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

The report options are the same as for the Events (Reach) report, above.

Summary Tables of Members Seen at Events from the selected Settings are included in this report.

The first Summary Table is grouped as rows by Event Months and then Member Type with the Seen at Setting set as columns.

A second Summary Table, based on Area, can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The bar chart displays the subtotals for each Setting but not the Total of ALL Settings.

Events (Reach) by Activity Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. Both Active and inactive Members within active and inactive Families are displayed in this report.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activities.

The report options are the same as for the Events (Reach) report.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows as Event Activities and the Seen at Setting set as columns.

- The second Summary Table is also for Setting but includes the Event Month as a further group.

- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Total of ALL Settings.

Events (Volume) by Activity with Anonymous Report

This report shows the number of times Members have attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. Both Active and inactive Members within active and inactive Families are displayed in this report.

It includes the number of Anonymous Members who have attended Event Activities.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activities.

The report options are:

- Seen at Setting

- Date Range (set against the Event Start and End Date)

- Gender

- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

The report options are the same as for the Events (Reach) report, except that it does not include Living at, Disability and Ethnicity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report:

- The first Summary Table is grouped with the rows as Event Activities and the Seen at Setting set as columns.

- The second Summary Table is also for Setting but includes the Event Month as a further group.

- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the Living At report option.

- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

Events (Reach) By Provider Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Provider.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Provider and then Event Activity. Both Active and inactive Members within active and inactive Families are displayed in this report.

Various subtotals are provided with this report. Even though it is a Reach report (which only counts once when an individual Member attended several Event Activities over several Providers), it does show Volume subtotals. The Volume subtotals all have a light coloured background and they count the number of times a Member has attended an Event, even if it is for the same Event Activity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows by Provider and the Seen at Setting set as columns.

- The second Summary Table is also for Setting but includes the Event Month as a further group.

- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

A bar chart for the Setting by Provider and a bar chart for the Area by Provider are at the last two pages of the Summary View option.

Events (Reach) By Location Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Location.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Location and then Event Activity. Both Active and inactive Members within active and inactive Families are displayed in this report.

Various subtotals are provided with this report. Even though it is a Reach report (which only counts once when an individual Member attended several Event Activities over several Locations), it does show Volume subtotals. The Volume subtotals all have a light coloured background and they count the number of times a Member has attended an Event, even if it is for the same Event Activity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows by Location and the Seen at Setting set as columns.

- The second Summary Table is also for Setting but includes the Event Month as a further group.

- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

A bar chart for the Setting by Location and a bar chart for the Area by Location are at the last two pages of the Summary View option.

Events (Reach) By Theme Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Theme.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Theme and then Event Activity. Both Active and inactive Members within active and inactive Families are displayed in this report.

Various subtotals are provided with this report. Even though it is a Reach report (which counts only once when an individual Member attended several Event Activities over several Themes), it does show Volume subtotals. The Volume subtotals all have a light coloured background and they count the number of times a Member has attended an Event, even if it is for the same Event Activity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows as Location and the Seen at Setting set as columns.

- The second Summary Table is also for Setting but includes the Event Month as a further group.

- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

A bar chart for the Setting by Theme and a bar chart for the Area by Theme are at the last two pages of the Summary View option.

Events (Reach) By Ethnicity Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Ethnicity.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Theme. It does not include information on the Event Activities attended. Both Active and inactive Members within active and inactive Families are displayed in this report.

The report options are the same as for the Events (Reach) report.

Three Settings based Summary Tables and one Living at Summary Table are included with this report.

- The first Summary Table is grouped by Ethnicity and Member Type with the Setting information running horizontally across.

- The second Summary Table is by Setting and Ethnicity.

- The third is grouped by Ethnicity, Setting and then Member Type.

- The fourth Summary Table will only appear, if the Living at option has been selected as a report option. This Summary Table is simply grouped by Ethnicity with the chosen Settings running horizontally across.

All the Summary Tables calculate a Reach total, which only counts an individual Member once even when they have visited several Event Activities over several Children's Centre setting.

The Setting and Area bar charts are by Ethnicity.

Events (Reach) by Outcome Report

This report shows a count of individual Members who have attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. It includes a column showing the Outcome Type of the Event Activity.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by the Event Activity.

The subtotals show a Volume Count of Members who have attended all the Event Dates without (coloured blue) and with the Anonymous members who attended (coloured green). Both Active and inactive Members within active and inactive Families are displayed in this report.

The report options are the same as for the Events (Reach) report.

There is only one Summary Table for this report. It is grouped by Setting and Event Activity as rows with the Outcome Type and Outcome Descriptions horizontally.

Members Seen by Ethnicity Report

This report shows both Reach and Volume totals and percentages, for both Active and Inactive Members, seen within the selected Date Range.

The report is grouped by Living At, if selected, Seen at Setting and then Ethnicity.

The total number of active Families Registered within the Setting is shown in the Setting totals.

The report options before running the report are:

- Seen at Setting

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Date Range (set against the Event Start and End Date)

Summary tables showing Reach totals exist for this report, the format depends on whether Living At has been selected.

Providers with Events (Basic) Report

This report shows both Reach and Event Volume totals, for both Active and Inactive Members and Families, seen within the selected Date Range.

The report is grouped by Seen at Setting, Provider and Event. The Care Workers associated with each Event are shown.

This report uses drop downs that allow for multiple selections of Care Workers, Events and Providers.

The report options before running the report are:

- Seen at Setting

- Date Range (set against the Event Start and End Date)

- Care Workers

- Events

- Providers

Providers with Events (Detailed) Report

This report shows both Reach and Event Volume totals, for both Active and Inactive Members and Families, seen within the selected Date Range.

The report is grouped by Seen at Setting, Provider, Event and Family. The Care Workers associated with each Event are shown.

This report uses drop downs which allow for multiple selections of Care Workers, Events and Providers.

The report options before running the report are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)
- Care Workers
- Events
- Providers

Members Seen By Provider Report

This report shows Reach, Volume and Anonymous Volume totals, where appropriate, for both Active and Inactive Members, seen within the selected Date Range.

The report is grouped by Report Type. The report options before running the report are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)
- Providers

The Report shows totals for Family Breakdown, Ethnicity, disabilities/Special Needs, Teenage Parents, Lone Parents, Settings and Age Range of Children.

Members Seen By Provider and Setting Report

This report shows Reach, Volume and Anonymous Volume totals, where appropriate, for both Active and Inactive Members, seen within the selected Date Range.

The report is grouped by Seen at Setting.

The report options before running the report are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)

The Report shows totals by Setting for the following categories: Children Seen, Carers Seen, Families Seen, Fathers Seen, Carers with Disabilities Seen, Children with Disabilities Seen, Lone Parents Seen, Teenage Parents Seen and Ethnic Minorities Seen.

Non Attendance Category

Children Not Seen Report

This report shows the number of individual Children who have **not** attended an Event Activity within the Date Range. Only Children who are active, with an active Family status, can be seen in this report.

The Date Joined and DOB fields of the Child need to be filled in for this report.

The report is grouped by Living At (if this option has been chosen), followed by Seen at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Start and End Date)

- Disabled

- Ethnicity

- Gender

- Age (by year or month) set to 0 – 4 years by default

It includes two Summary Tables that count the number of individual Children who have not attended an Event Activity and they are either by Setting or Area (Living At).

The Area Summary Table will only show, if the **Living At** option has been selected.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area, hence the number can vary from manually adding up the subtotals.

Carers Not Seen Report

This report shows the number of individual Carers who have not attended an Event Activity within the Date Range. Only Carers who are active with an active Family status can be seen in this report.

The Date Joined field of the Carer must be filled in for this report to appear.

The report is grouped by Living At (if this option has been chosen), followed by Seen at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking

It includes two Summary Tables that count the number of individual Carers who have not attended an Event Activity. These are by Setting and Area (Living At).

The Area Summary Table will only show if the Living At option has been selected as a report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

Appointments Missed

This report shows the Appointments missed by Carers and Children. It displays the Event Activity Name and Event Date. The Count of Appointments missed includes all the times Carers or Children have not attended an Event Activity that they have been registered on within the selected Event Date Range.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Member Type
- Disabled
- Ethnicity
- Gender

It includes two Summary Tables that count the number of times Carers or Children have not attended an Event Activity and they are either by Setting or Living At. The second Summary Table (by Area) will only show if the **Living At** option has been selected.

Mothers Not Seen

This report shows the number of Mothers who have not attended an Event Activity for which they were registered. The Events all took place during the first two months after the birth of their child. It will only show the Mothers who are active and also have an Active Family status.

The report is grouped by Living At (if this option has been chosen), followed by Seen at Setting.

The report options are the same as for the Carers Not Seen report.

It includes two Summary Tables that count the number of individual Mothers who have not attended an Event Activity, by **Setting** and by **Area** (Living At).

The Area Summary Table will only show if the **Living At** option has been selected. The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area, hence the number can vary from manually adding up the subtotals.

Pregnancy & Birth Category

Pregnant Teenagers Now Registered Report

This report gives a list of Pregnant Teenagers registered in the selected Setting/Settings from the date the report is run. Information will only be included if both the Pregnant Teenager and the Family are active.

It is grouped by Living at (if it has been chosen), and then Registered at Setting.

The Contact Address Information with Contact Numbers can be seen with the Pregnant Teenager information when the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report options are:

- Registered at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set by the Start and End Date)
- Disabled
- Ethnicity
- Parent
- Lone Parent
- Currently Smoking
- Consent Given

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual Pregnant Teenager at a Setting or Area. The Total of each Setting calculates a Reach count of each Pregnant Teenager. If a Pregnant Teenager's Family is affiliated to two other Settings, then it will still be counted as one Pregnant Teenager for the Total, representing ALL Settings.

Pregnant Women Seen (Reach) Report

This report shows the number of individual Pregnant Women seen at the selected Children's Centre Settings within the chosen Date Range.

The report is grouped first by Living At, if this option has been selected, then Registered at Setting. It does not include information on the Event Activities attended. Both Active and Inactive Pregnant Women who have attended an Event Activity are displayed.

The Contact Address information with Contact Numbers can be seen with the Carer information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Start and End Date)
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Parent
- Lone Parent
- Currently Smoking
- Consent Given

A Summary Table of Carers Seen from the Registered Settings is included in this report.

An Area Summary Table can be seen in this report if a Setting, Postal Area, Super Output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area, hence the number can vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total.

Births of Children Report

This is a short cut to the same report available in the **Children** category.

Breast Feeding Category

Record of Breast Feeding Report

This report displays the information of each mother with her child and also shows five columns of information (Breastfed at Birth, at six weeks, at three months, at six months and at one year).

The Contact Address information with Contact Numbers can be seen with the mother's information, when the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report is grouped by Living at (if it has been chosen), then Registered at Setting.

It includes a count of individual mothers for each Setting as well as each Area, and a general count of how many children have been breastfed in the various periods after the birth.

Health Category

Smoking Record Report

This report shows all the Carers with their Smoking Information, if they have ever smoked, within the Registered Settings. A tick for Smoking indicates that the Carer is still currently Smoking.

There is a check box report option to only show current Smokers of the chosen Registered at Setting or Settings. Additional Notes in the Smoking history can also be seen in this report.

The information is grouped first by Living at (if this has been selected), then Registered at.

The report options are:

- Seen at Setting/Registered at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking
- Pregnant
- Consent Given

The Totals are a Reach count, which means that an individual Carer is only counted once.

Careworker Category

Careworkers and Events (Reach) Report

This report is grouped by Seen at a Children's Centre Setting and the events attended by the Careworker as well as which members have attended.

The subtotal under the Event Activity that the Careworker instructed or participated in shows how many times it has occurred e.g. Baby Yoga over 6 weeks would be 6 times for this Event Activity. It also shows how many different members the Careworker has reached in a Setting as well as amongst all the Settings that they worked at.

This report is first grouped by Careworker and then by Registered at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and Event End Date)
- Careworker Surname (can enter the first few letters of a surname)
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

If many Careworkers work for a Setting, then a Surname (complete or in part) can be entered as a Report option to narrow down the output.

Careworkers and Events (Volume) Report

This report is grouped by Seen at a Children's Centre Setting and the events attended by the Careworker as well as which members have attended.

The subtotal under the Event Activity that the Careworker instructed or participated in shows how many times it has occurred e.g. Baby Yoga over 6 weeks would be 6 times for this Event Activity.

It also shows how many members the Careworker has reached in a Setting as well as amongst all the Settings that they worked at. For this report it is a **Volume** count of Members, so if a Member has attended several courses under the same Careworker over several weeks, then it will be counted as one for each time.

This report is first grouped by Careworker and then by Registered at Setting. The report options are the same as for the Careworkers and Events (Reach) report.

Careworkers and Events Summary (Reach) Report

This report shows the Summary Table immediately and is grouped by Settings seen at, followed by the Careworker and then separated into New and Existing Carers or Children.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and Event End Date)
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

The Summary Table counts how many individual New and Existing Carers or Children have been seen at the Setting for each Careworker. Carers and Children are classified as New when their own

Joined Setting Date is the same as the given Start Date. The Date Range is based on the Start and End Event Date.

Careworkers and Events Summary (Volume) Report

This report shows the Summary Table instantly and it is grouped by Settings seen at, followed by the Careworker and then separated into New and Existing Carers or Children.

The report options are:

- Seen at Setting

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Date Range (set against the Event Start and Event End Date)

- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

The Summary Table counts how many times New and Existing Carers or Children have been seen for all the Event Activities at the Setting for each Careworker. Carers and Children are classified as New when their own Joined Setting Date is the same as the given Start Date. The Date Range is based on the Start and End Date.

Careworkers and Hours worked at Events Report

This report shows how long Careworkers have spent within the selected Date Range on Event Activities for a particular Setting. It also shows which members have attended the Event Activities.

The Event Duration needs to be entered in order for this report to give the time spent at each Event and Setting for a Careworker.

This report has the same report option as the Careworkers and Events (Reach) Report.

The Summary Table counts how many times the Careworker has been at each Event. The Subtotal and the Main total count the number of different Event Dates.

Members and Hours spent at Events Report

This report shows how long Members have spent within the selected Date Range on Event Activities for a particular Setting. It lists the Event Activities the Members have attended.

The Event Duration needs to be entered in order for this report to give the time spent at each Event and Setting of a Member.

This report has the same report option as the Careworkers and Events (Reach) Report.

The Summary Table counts how many times the Member has been attended an Event. The Subtotal and the Main total count the number of times the Events have occurred.

Sure Start Category

M3 (Registered at requested Settings) Report

This supplies information for the government's M3 (Monthly Reach Information, selected months only) return.

This report divides the information displayed as for either New or Existing Members and Families registered in the chosen Setting over five different Summary Tables. This report was created to run monthly for the government return.

- The first Summary Table does a count of how many registered Children were seen from the selected Setting by their age.
- The second Summary Table shows these Children seen, divided by their Ethnicity.
- The third Summary Table is on various Female Carers seen.
- The fourth table is based on Families seen
- The fifth table is based on different Carers.

The report options are:

- Registered at Setting
- Event Date Range

This report also gives a count of births of babies in the Date Range.

M3 (Seen at requested Settings) Report

This supplies information for the government's M3 (Monthly Reach Information, selected months only) return.

This report divides the information displayed as for either New or Existing Members and Families seen in the chosen Setting over five different Summary Tables. This report was created to run monthly for the government report.

- The first Summary Table does a count of how many registered Children were seen from the selected Setting by their age.
- The second Summary Table shows these Children seen divided by their Ethnicity.
- The third Summary Table is on various Female Carers seen.
- The fourth table is based on Families seen
- The fifth table is based on different Carers.

The report options are:

- Seen at Setting
- Event Date Range

M7 Report

This report shows numerous targets that are required for the annual government return.

The report options are:

- Registered at Setting
- Event Date Range

NCH Section 1 Report

The first part of the report shows numbers of members registered at the selected Setting. Only active members are counted.

The report options are:

- Seen at Setting

- Event Date Range

The Summary Table on the left breaks down the Members seen by their Ethnicity groups and the right hand Summary Table is grouped by Age and Gender.

NCH Section 2 Report

This report shows information on families who are active as well as referrals made to the Setting. The report options are:

- Seen at Setting

- Event Date Range

Custom Fields Category

Custom Report

This report displays information about Children, Carers and Families grouped by Registered at Setting, the Member Type and the Custom Label. The report will also show if this is a Hard to Reach Label. Active and inactive Members and Families can be seen in this report.

The report options are:

- Registered at Setting

- Living at: Setting/Postal Area/Super output Area/Custom Label

- Member Type

- Ethnicity

- Gender

- Hard to Reach

- Custom Type Label

- Consent Given

A Setting based Summary Table is included with this report.

An Area based Summary Table can also be seen, if one of the options has been selected for **Living At**.

The Summary Tables are grouped by Setting, Member Type and Custom Labels. The total carries out a normal count of Members within each Custom Label i.e. if a Carer appears in three different Custom Labels then it will be three.

Hard to Reach Reports Category

Hard to Reach Report

The report displays information about Children, Carers and Families grouped by Registered at Setting, the Member Type and the Custom Label. Active and inactive Members and Families can be seen in this report.

The report only shows Hard to Reach Labels and does not include any Subtotals or Summary Tables.

The report options are:

- Registered at Setting
- Living at: Setting/Postal Area/Super Output Area/Custom Label
- Member Type
- Ethnicity
- Gender
- Hard to Reach

Events by Aims Category

Event Type Report

This report shows what Event Aims have been set up for Event Activities catering for Carers. It also displays which Event Group the Event Activity is linked to.

The report options are:

- Registered at Setting
- Event Date Range
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

Two Summary Tables are included in this report. One is grouped by Setting and Event Aims and the second one also includes the Event Group.

Children Reach Report

This report shows the Event Aims that have been set up for the Event Activities that Children have attended. It also displays which Event Group the Event Activity is linked to. Active and inactive Children will appear in this report.

The report options are the same as for the Event Type Report, above.

Two Summary Tables are included in this report. One is grouped by Setting and Event Aims and the second one also includes the Event Group.

Children Volume Report

This report shows the Event Aims that have been set up for the Event Activities that Children have attended. It also displays which Event Group the Event Activity is linked to and the Event Date.

The report options are the same as for the Event Type Report, above.

Two Summary Tables are included in this report. One is grouped by Setting and Event Aims and the second one also includes the Event Group. It does a count of every time a Child has attended an Event Activity with an Aim.

Audit Logs

Audit Log Report

⚠ Only Users set as Console Managers are able to access the Audit Logs category and Audit Log report.

This report shows a New Value changed or added by a User on the Family, Carer or Child screens.

The Log Type dropdown option before running the report allows the report to display only Audited, Accessed or All information.

The **Audit** section of the report is grouped by the User who has made changes to the Family screens. It lists the Family ID and Date/Time when the audit occurred along with the name of the field and the previous and new value.

The information displayed for the **Access** section will only list the Family ID and Date/Time when the search occurred. It is also grouped by User.

The report options before running the report are:

- Seen at Setting
- Date Range (set against which Start and End Date)
- Log Type
- User Name

Quarterly Profiles Category

Quarterly Profile Main Report

This report shows high level Reach and Volume Members Seen totals, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

The Report is grouped by Centre, with a Summary option available. The Summary Reach totals are NOT the sum of the Centre Reach totals, but have been calculated as the overall Reach totals, i.e. a Member that has attended both Centre 1 and Centre 2 within the quarter will only be counted as one.

Both Active and Inactive Members are reported.

The following Measures, by Quarter, are reported, if the data is available:

- Number of Events held
- Number of Weekday (Daytime) Events held *(Events with start times before 18:00 hrs)*
- Number of Weeknight Events held *(Events with start times from 18:00 hrs onwards)*

- Number of Weekend Events held
- Number of Families Registering
- Number of Families Affiliating
- Volume All
- Volume Carers
- Volume Children under 5 *(Under 5 at the time of the Event)*
- Volume Children 5 – 18 yrs
- Volume Children (No DOB recorded) *(Ensures child records with no DOB are included)*
- Reach All
- Reach Carers (All)
- Reach Carers (Female)
- Reach Carers (Male)
- Reach Carers (No Gender Recorded) *(Included to ensure all totals add up)*
- Reach Carers with Special Needs
- Reach Carers – Fathers
- Reach Carers with Disability
- Reach Carers Employed
- Reach Carers Unemployed
- Reach Carers Lone Parent
- Reach Carers Teenage Mothers or Pregnant Teenagers
- Reach Children Under 5 *(Under 5 at the time of the Event)*
- Reach Children 5 – 18 Years
- Reach Children (No DOB recorded) *(Ensures child records with no DOB are included)*
- Reach Children in workless Households
- Reach Children in BME Groups *(Totals exclude White UK/Irish, Refused or Not obtained)*
- Reach Children with Disability
- Reach Children with Disabled Parents
- Reach Children with Special Needs
- Reach Children with Parents with Special Needs

The report options before running the report are:

- Seen at Setting
- Quarter

⚠ Please be aware of the following:

- **Select the Quarter you wish to report as "This Quarter". The "Previous Quarter" and "This Quarter Previous Year" Dates will be calculated automatically.**

- Disability, Special Needs and Employed Status are the current status for the Member concerned, not necessarily their status in the Previous or Last Year's Quarter.

- Ages are calculated between the Date of Birth and the Event Date. It is possible that a Child having their 5th birthday within a quarter would appear in both the Reach Children Under 5 and Reach Children 5 – 18 Years totals, if the Child attended Events prior to and after their 5th birthday.

Quarterly Profile Outcomes

This report shows high level Reach and Volume Members Seen totals, by Outcome Types and Individual Outcomes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

The Report is grouped by Centre, Outcome Category and Outcome Type. A Summary option is available. The Summary Reach totals are NOT the sum of the Centre Reach totals, but have been calculated as the overall Reach totals, i.e. a Member that has attended both Centre 1 and Centre 2 within the quarter will only be counted as one.

Both Active and Inactive Members are reported.

The following Measures, by Quarter and Outcome Type are reported, if the data is available:

- Number of Event Types held
- Number of Events held
- Reach (All) at Events
- Reach (Carers) at Events
- Reach (Children) at Events
- Volume (All) at Events
- Volume (Carers) at Events
- Volume (Children) at Events
- Volume (Anonymous) at Events

The following Measures, by Quarter and Individual Outcomes are also reported, if the data is available:

- Reach (Carers)
- Reach (Children)
- Volume (Carers)
- Volume (Children)

The report options before running the report are:

- Seen at Setting

- Quarter

⚠ **Please be aware of the following:**

- **Select the Quarter you wish to report as "This Quarter". The "Previous Quarter" and "This Quarter Previous Year" Dates will be calculated automatically.**

Quarterly Profile Themes

This report shows high level Reach and Volume Members Seen totals, by Themes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

The Report is grouped by Centre and Theme. A Summary option is available. The Summary Reach totals are NOT the sum of the Centre Reach totals, but have been calculated as the overall Reach totals, i.e. a Member that has attended both Centre 1 and Centre 2 within the quarter will only be counted as one.

Both Active and Inactive Members are reported.

The following Measures, by Quarter and Theme are reported, if the data is available:

- Number of Event Types held

- Number of Events held

- Reach (All) at Events

- Reach (Carers) at Events

- Reach (Children) at Events

- Volume (All) at Events

- Volume (Carers) at Events

- Volume (Children) at Events

- Volume (Anonymous) at Events

The report options before running the report are:

- Seen at Setting

- Quarter

⚠ **Please be aware of the following:**

- **Select the Quarter you wish to report as "This Quarter". The "Previous Quarter" and "This Quarter Previous Year" Dates will be calculated automatically.**

Appendix B

Location Guidance

Adding a new event location

Locations are added to eStart by emailing the performance.support@cumbria.gov.uk mailbox.

When requesting a new location to be added to eStart please state the full address and postcode. This must be checked on the post office website and a screenshot sent with the request email as this saves the performance team time researching a event venues address. The Please see example below
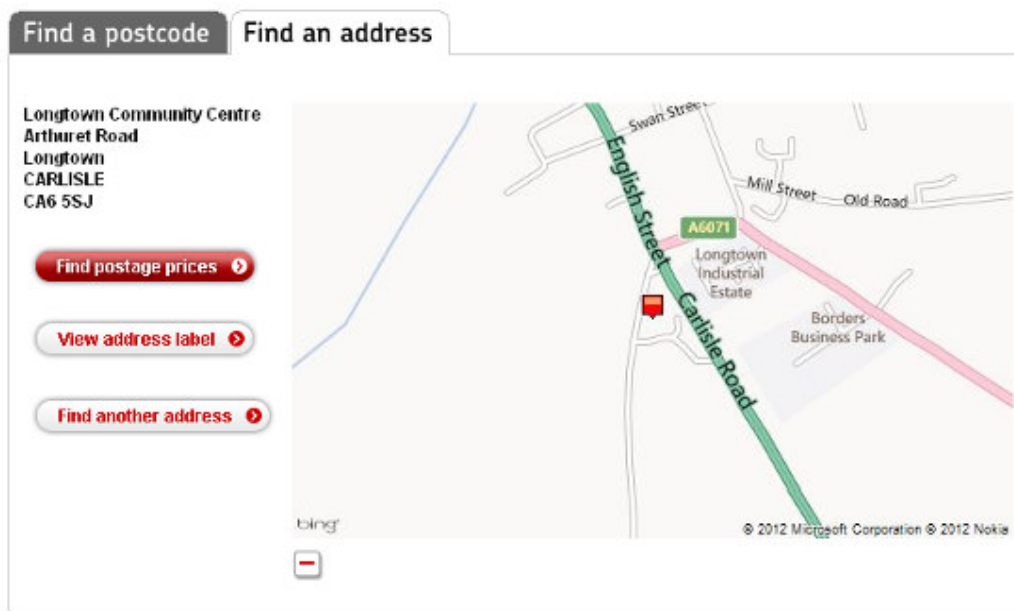
If after searching the post office site and other searches on Google no address can be found, please send details of your search so far, to the performance support team who will advise you appropriately.

The performance Support Team will add location venues to the Children's Centre setting where it is located and an email will be sent to the Children's Centre stating that this has been completed.

Events and locations

When a regular (more than once) event is delivered in a Children's Centre footprint that event should be entered into eStart as belonging to the Children's Centre footprint where it's located. For example if the Workington Children's Centre team is delivering a parenting course in a venue located in the Derwent Valley Children's Centre area, then the event shall be listed as a Derwent Valley Children's Centre Event with the appropriate event location.

If an event is delivered outside of a Children's Centre's footprint because it's a day trip, special outing or excursion etc then it shall be listed as the Children's Centre event with an event location of, 'Outside of area'.
For example the Carlisle Rural Children's Centre team has an event at Silloth Beach which is located in the North Allerdale Children's Centre footprint. This event is an excursion and will be entered into eStart as an event belonging to Carlisle Rural and the event location will be listed as 'Outside of area'.

This guidance is in place because eStart is a database and it's designed to report on the information contained within it in a certain way. When we all enter the data in a consistent way across the county this will give us accurate reports on our events.

Entering a child's details on the eStart database

A child's details can be added onto eStart when we have the Parental Consent to do so. It is the Children's Centres responsibility to determine Parental Responsibility for giving the parental consent for a child. We have listed a couple of examples below

Grandparents

If a child attends an event with a Grandparent and registers with the Children's Centre, the Child must be entered onto eStart with their parent/s consent, as the parent/s normally have the Parental Responsibility for the Child's data to be kept on the eStart database. The Grandparents are entered onto eStart at their own home address.

Childminders

If a child attends an event with a Childminder and registers with the Children's Centre, the Child must be entered onto eStart with their parent/s consent, as the parent/s normally have the Parental Responsibility for the Child's data to be kept on the eStart database. The Childminder is entered onto eStart at their own home address.

Young People

If a Young Person attends an event at a Children's Centre and registers themselves, then they shall be added to eStart as a child record. eStart can hold details of a address and child on the system without a carer record being present. This would be used for Young People who attend events where it is deemed by a Children's Centre that the Young person is able to give their consent to their details being held on the database.

Moving Carers and Children in eStart

If a whole family moves house

On the families main page select Change Address and when this is completed you will also need to change the setting. The setting (Children's Centre) shall correspond to the postcode. The warning symbol identifies that there is an address that does not correspond to a setting.

Warning symbol

The setting shall correspond with the postcode

Select this to change a family's address

Duplicate child/ carer records

If you identify any duplicate records email performance.support@cumbria.gov.uk stating the family and individual ID numbers and which information is correct and which information should be removed/merged. When this has been completed please check the family record and amend any details with are incorrect such as the GP, mobile number, date of birth, ethnicity etc. All the event history from both duplicate records will remain with the family.

For any of these examples given below please email performance.support@cumbia.gov.uk
 Children move into foster care
Children/ carers move in with other relatives

Children and one of the carers move house leaving other members of the family at the old address
Carer moves out of the family address with no forwarding address
If a child on eStart becomes a parent and stays at the family address
If a child on eStart becomes a parent and moves address

Focus Family

eStart will record the identified families for the 'Focus Family' work in the following way

The Children's Centre will create a create a 'Flag' on a families front page through the warning sign (1)

The Children's Centres will record in each family members 'Hard to Reach' section that this Child or Carer is part of the 'Focus Family' work. (2)

A report can be generated on a county and individual Children's Centre basis which shows details of these identified Families
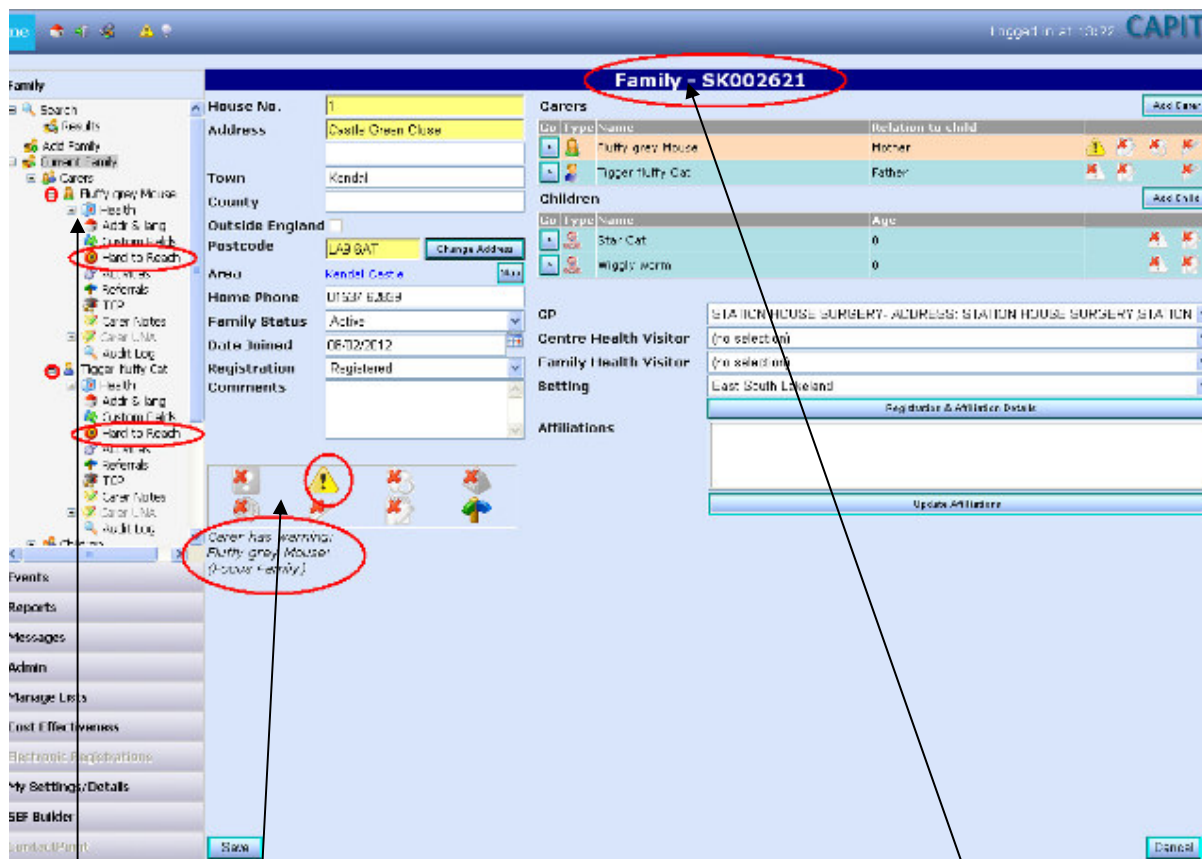
Family ID number

(1) A warning Sign is visible on the Families front page

 (2) On each family members menu (underneath their name) the 'Hard to Reach' section is opened and the category 'Focus Family' is selected and this will produce a report available in the system.

How to create a flag on a family's front page

Select the main Carers details page and select 'Focus Family' from the warnings tab. Save the change.

Save the changes

Select 'Focus Family' on the warnings tab

Main Carers details

Recording 'Hard to Reach'

On the menu on the left hand side there is a 'Hard to Reach' icon under each of the family members' names. Select this icon and the 'Hard to Reach' page will appear (as seen below). Tick the box and state in the text field which Focus Family criteria this family qualify under. Do this for every family member.

'Hard to Reach' section   Tick this box   State criteria

Criteria for Focus Family

All 3 of these criteria automatically enter programme			
Family may have any combination of 2 of these			... and this one
Crime / Anti-social behaviour	Education	Worklessness	Local Discretion
1 or more under-18 year-old with a proven offence in last 12 months	Child or children subject to permanent exclusion	Household where an adult is receiving DWP out of work benefits	This is a very broad category and LA able to set local priorities as an additional filter
and/or	or		E.g. Families subject to:
1 or more family members has received some form of intervention or offence regarding Anti-Social Behaviour	Child or children in a PRU or alternative provision due to exclusion OR Is not on a school roll		>Child on Child Protection Plan >Frequent police call-outs or arrests >Domestic Violence
	and/or		
	Child or children have 15% unauthorised school absences in last 3 consecutive terms		>Health problems >emotional and mental health issues; >drug and alcohol misuse; > under-18 conceptions

How to produce the Focus Family Report

Select the main report section and the + sign on the Hard to Reach section.

Registered at Setting- Select which centres you would like a report on
Living at- Select 'no selection' for children/carers that live anywhere or select 'Setting' to specify a particular Children's Centre setting where families live
Member type- Select All
Ethnicity- Defaults to All
Sex- Defaults to both genders
Hard to Reach- Select Focus Family
Consent- Defaults to yes
Select RUN

Report Section   Hard to Reach Report

Select Focus Family

Select Hard to Reach Report

The report that's generated on Focus Families across Cumbria

Children's Centre

Family ID number

Carers details

Children's details

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