oneeducation

eStart Web Administrator

last updated for the Spring 2018 release

Handbook

CAPITA

Revision History

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Spring 2018 (3.65) - 1.0	27/04/2018

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eStart Web Administrator Handbook/Spring 2018/2018-04-27

www.capita-one.co.uk

Contacting One Application Support

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

Providing Feedback on Documentation

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

onepublications@capita.co.uk

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

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01 | eStart Web Administration

Overview

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

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

What's New in this Release?

The following changes have been made in this release:

The eStart person delete functionality has been updated to be compliant with GDPR regulations. Deleting a person (e.g., parent, carer, child or family) from eStart now removes all information about them from all the relevant database tables. Deleting a person is <u>irreversible</u>.

The Console Manager – Role and Responsibilities

The **Console Manager** (CM) role varies between Local Authorities. In some, the Console Manager is a full-time role and is an internal employee; in others it is a part-time outsourced role. In all cases the Console Manager must be aware that they have the highest level of access to all settings in their area. Responsibilities may include some or all of the following:

- Looking after all areas in the **Admin** section.
- Maintaining drop-down menus.
- Creating eStart user accounts.
- Administering passwords.
- Creating and managing user groups.
- Maintaining the database and effecting anti-duplication strategies.
- Managing affiliation requests.
- Implementing usage policies (e.g. which fields are mandatory etc.).
- Managing custom queries and reports, and ensuring that the correct reports and custom queries are available to users.
- Submitting bug reports and enhancement requests to the One Service Desk.
- Managing an internal eStart user forum.
- Checking the audit and access logs if necessary.

System Requirements

The minimum requirements for eStart Web access are very simple; a PC with Internet Explorer should be enough to gain access.

Client:	Internet Explorer 8	
Screen Resolution:	1024x768 or higher. *We recommend that screen resolution is set to the highest available, especially on flat screen monitors and that font size is set to* ***Large*** *in* ***Control Panel | Display | Appearance****.*	
Internet speed:	0-5 users	2mb
	6-10 users	4mb
	11 users+	8mb

Speed Testing

Speedtest.net

We strongly recommend that you test your internet speed at each Children's Centre location before you go live. You may already have a standard application to do this for you, but if not you may wish to try www.speedtest.net .

Click on the yellow pyramid symbol to conduct a simple speed test.

Figure 1 Speed Test result

eStart Testing

Within eStart, a good benchmark test is to add a family with one carer and one child. With a good internet connection, the time taken to move from screen to screen when clicking the **Next** button should be approximately 1-5 seconds.

Browser Maintenance Recommendations

Users should be encouraged to carry out the following weekly tasks to ensure fast and trouble-free browsing:

- Delete temporary internet files
- Delete cookies

Support

The One Service Desk is available from 8.30am to 5pm for all support calls and for advice regarding Change Requests.

Telephone the Service Desk on: 0870 2411 323

Email: one.support@capita-cs.co.uk

Upgrades

The upgrade procedure to be followed depends on whether you are a hosted or self-hosted site.

Hosted Sites

Capita carries out all your upgrades for you. You are typically notified in advance, and release notes are distributed by email to the eStart Administrators' mailing list. This notification includes details of downtime with a recommended log-out time. Please pass the release notes and downtime details to your users.

Self-Hosted Sites

Should you choose not to self-upgrade either of these components and would like One Technical Services to carry out this upgrade for you, please contact the One Services team for further details at one.services@capita-cs.co.uk.

Self-Maintained

Upgrade details will be sent to you shortly before a new release is available.

Where the Capita One Online server is used

The web server component of eStart is deployed on the Capita maintained One Online Server, and therefore needs to be upgraded by One Technical Services. Please advise us in advance of the date you intend to upgrade the eStart SQL database by contacting the One Service Desk: one.support@capita-cs.co.uk, and a simultaneous upgrade of the web-server component will be arranged. This is in line with the process of your One upgrades.

02 | Setting up eStart

Settings

It is the responsibility of an eStart Administrator to check the settings (the centres that members are registered at) before eStart is made available to users. The initial planning of eStart in your authority should include a discussion with a project manager about your settings and how you plan to use eStart.

Settings are commonly added as Children's Centres, but the options differ depending on your requirements and planned use. Click **Admin | Manage Dropdowns | Postcodes/Settings | Settings** to review your settings.

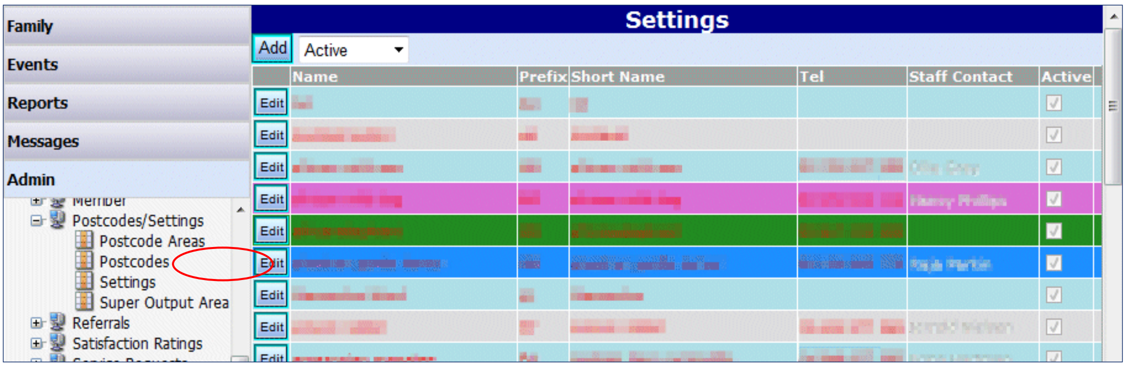


Figure 2 Admin | Settings

New settings are displayed in black text. When a setting has data saved against it in eStart, it is displayed in red text, as in the example above. After your eStart system is licensed, you can add new settings using the **Add** button.

Click the **Edit** button for a setting if you need to make any changes to the setting's details. Great care must be taken when editing settings displayed in red text, because any changes made will affect the data wherever it is used.

Once the settings are configured, you must verify with the project manager that the postcodes have been loaded and are ready for use.

Adding a New Setting

1. Open the **Admin | Manage Dropdowns | Postcodes/Settings | Settings** page.
2. Click the **Add** button to display the **Add Setting** page:

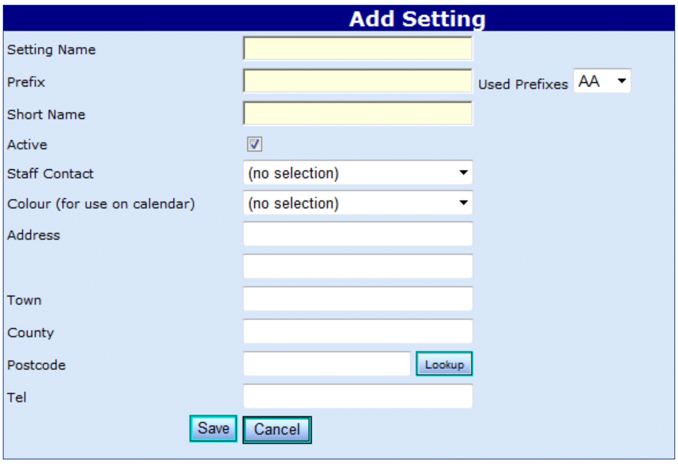


Figure 3 Add Setting

3. Enter the details of the setting, taking special note of the following points:
   - **Setting Name** is mandatory.
   - **Prefix** is mandatory. The prefix must consist of two characters (letters or numbers) and must be unique, because all the family IDs for this setting will begin with this code. A dropdown list displays the prefixes that have already been used.
   - **Short Name** is mandatory. The **Short Name** is used in areas of eStart such as reports and administration.
   - The Active check box for newly added settings is selected by default. If you do not want the setting to be immediately available in eStart, deselect the check box.
   - A **Staff Contact** cannot be added until the setting has been saved. Please see Adding a Staff Contact to a Setting on page *6*.
   - Select the **Colour** to be used for this setting's events on the **Events Calendar** and in lists of settings. For more information on the Events Calendar, refer to the **Events Calendar** section in the eStart User Handbook.

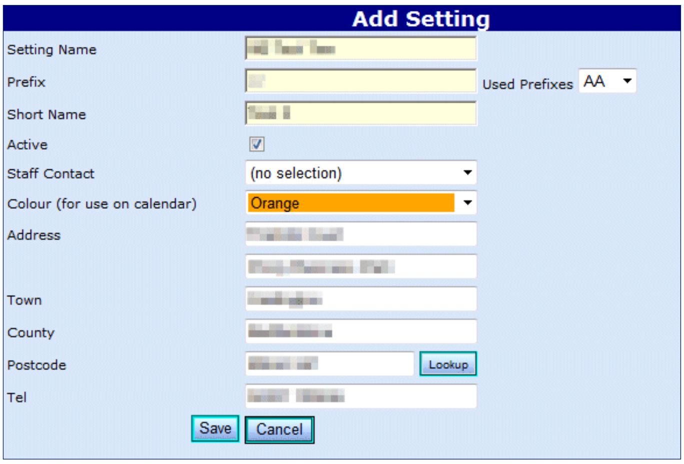


Figure 4 New Setting details

If a colour is not selected for the setting, the setting and its events display in the default colours for the page or list.

4. Click the **Save** button. The new setting is added to the list of settings. In this example the new setting has an orange background (selected on the **Add Setting** screen) and is displayed in black text (once some data has been saved for the setting it will be displayed in red text).

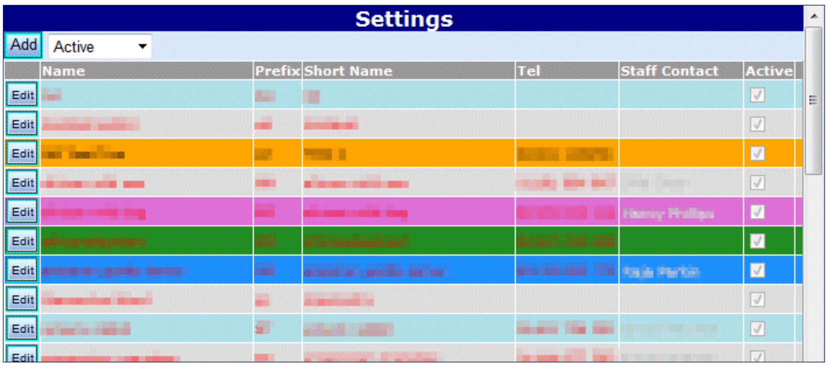


Figure 5 New Setting details

Adding a Staff Contact to a Setting

A **Staff Contact** is added after the new setting's details have been added and saved. They are selected from the list of care workers and health visitors attached to that setting.

1. Select Admin | Manage Dropdowns | Care Workers | Care Workers to display the Care Worker page or Admin | Manage Dropdowns | Care Workers | Health Visitors to display the Health Visitors page.
2. Click the Edit button for the person you wish to attach to the setting to display the Personal Details page.
3. From the Settings list, choose the settings to which you wish to attach them.
4. Click the Save button to add them to the Staff Contact dropdown for that setting.
5. Return to the setting via Admin | Manage Dropdowns | Postcodes/Settings | Settings and click the Edit button for this setting to display the Edit Setting screen.
6. Select the care worker or health visitor from the Staff Contact dropdown.
7. Click the Save button.

Postcodes

Postcodes for your area are initially uploaded during eStart setup, but more can be added, e.g. for out of area families.

To maintain postcodes, click **Admin** | **Manage Dropdowns | Postcodes/Settings | Postcodes**.

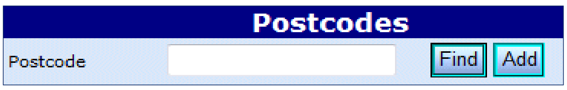


Figure 6 Postcode Administration

Enter a postcode and click the **Find** button to check existing postcodes (this postcode search does not work on partial entries, so you must enter the full postcode), or the **Add** button to add a new postcode:

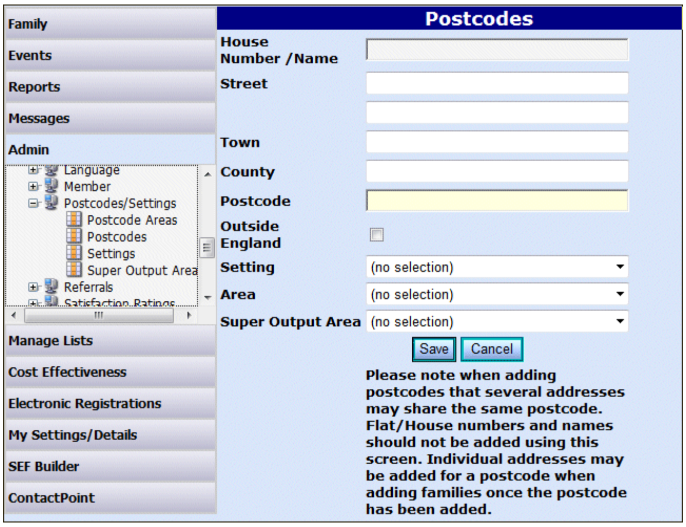


Figure 7 Add a Postcode

Select a **Setting**. Families living at postcodes without settings are identified as **Out of Area**.

If you are using **Areas** or **Super Output Areas**, these should also be selected.

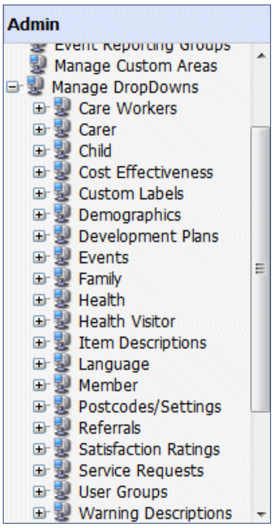
Do not use this screen to add individual house or flat numbers as there will be several of these for each postcode. They should be entered after adding the postcode, when adding families.

***Note**: This is intended to enable the occasional postcode to be added. If you need to add more than 20 postcodes, please contact the One Service Desk.*

03 | Manage Dropdowns

Setting up Dropdown Lists

Once the settings and postcodes are set up, you should confirm that the dropdown lists are set up with all the items you need to get started. More items can be added later.



Click **Admin | Manage Dropdowns** to open the list of dropdowns.
Click the "+" symbol to open the menu option, then click the dropdown you wish to edit. A list of items opens in the right-hand panel, with **Add** and **Edit** buttons.

Figure 8 Admin | *Manage Dropdowns*

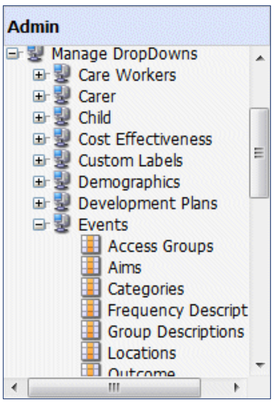
For a complete list of dropdowns and where they are used in eStart, please see [Appendix: Dropdowns and their location within eStart] on page *73*. It is not necessary to add items to dropdowns you do not intend to use, however some must be populated before you use eStart. These, and dropdowns with more complex requirements, are described in the following topics.

When a dropdown item is changed or added, the new item is available for use immediately when a user refreshes the list. When a dropdown item has been used, it is displayed in red text and cannot be deleted.

In many cases duplicate or redundant dropdown items can be merged, see Merge Dropdown Items on page *21* for more information. This is not possible with all dropdowns, for example, **Satisfaction Ratings** and **Super Output Areas** cannot be merged.

Adding Items to Dropdowns

1. To add an item to a dropdown list, select the dropdown name from the left-hand menu.



The following example uses the **Frequency Descriptions** dropdown. The menu route for this is **Manage Dropdowns | Events | Frequency Descriptions**.

Figure 9 Frequency Descriptions dropdown

The current items for this dropdown are listed.

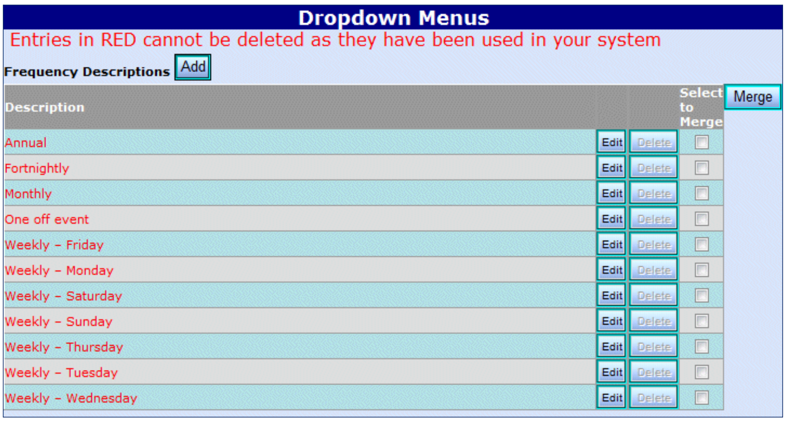


Figure 10 Manage Frequency Descriptions

2. Click the **Add** button to display the **Add Item** page.

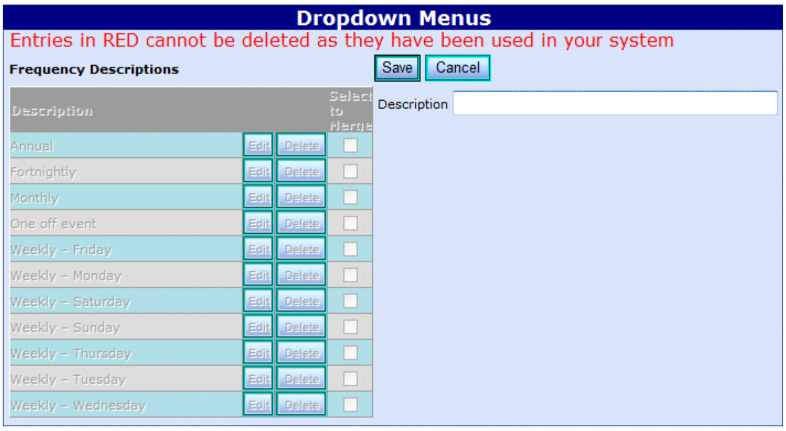


Figure 11 Add a New Frequency Description

3. Enter the **Description** for the new item. In this example, the new description is **Daily**.

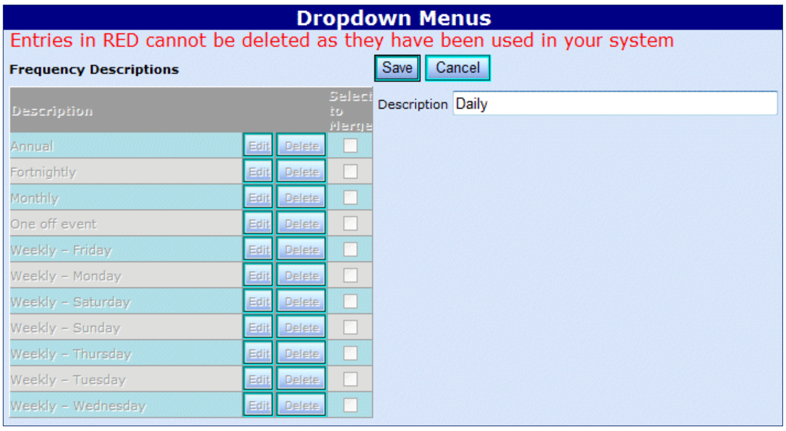


Figure 12 New Frequency Description entered

4. Click the **Save** button to add the new description to the dropdown menu:

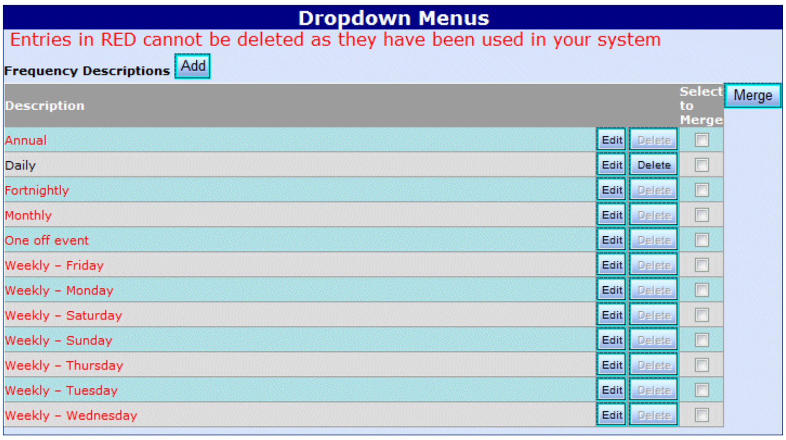


Figure 13 New Frequency Description added to the dropdown menu

Care Workers

Care workers are managed via **Admin | Manage Dropdowns | Care Workers | Care Workers**.

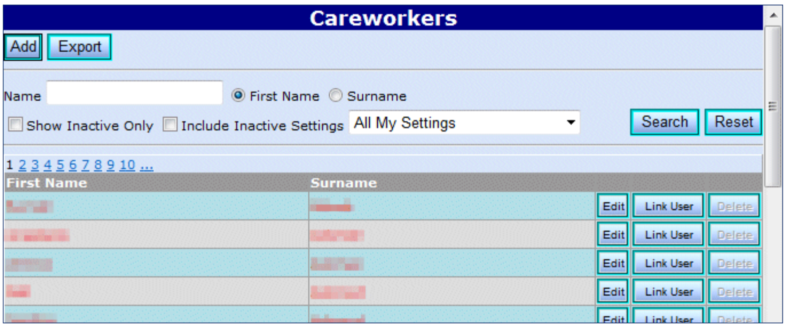


Figure 14 Care Worker list

Select suitable filters (**First Name**, **Surname**, **Show Inactive Only**, **Include Inactive Settings** and a **Settings** dropdown) and click the **Search** button to filter the list. The **Reset** button removes the filters.

- To export the filtered list to a .csv file, click the **Export** button to open the **File Download** window. Click the **Open** button to display the file, or the **Save** button to save it for later.
- Click the **Link User** button to link the selected care worker to a user.
- Click the **Edit** button to display the **Care Worker Details** screen.
- Click the **Add** button to enter the details for a new care worker.

Adding a Care Worker

When adding a new care worker, you must enter details in the following tabs:

- **Personal**
- **Contact Details**
- **Quantifications**
- **Training.**

To add a new care worker:

1. From the **Careworkers** page, click the **Add** button to display the **Personal Details** screen.
2. Complete the fields as appropriate.

Personal Details

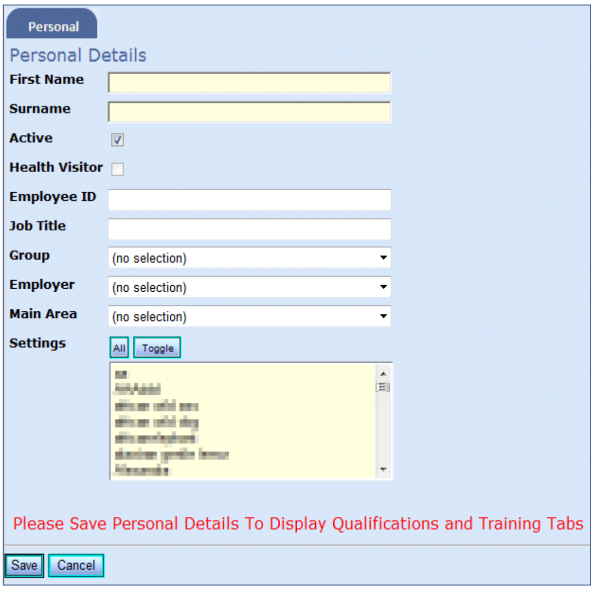


Figure 15 Personal Details tab

Please note:

- **First Name** and **Surname** are mandatory.
- The **Active** check box is selected by default. If a care worker is assigned to a current or future event the **Active** check box cannot be deselected. To make a care worker inactive**,** all current and future events must be unassigned.
- Select the **Health Visitor** check box to make this person available as a health visitor within a UNA or on the **Family Details** screen. Once a person has been identified as a health visitor, they are no longer available in the list of care workers.
- It is important to select the appropriate **Settings**. You can multi-select settings by clicking on them or click the **All** button. Click the **Toggle** button to reverse your selections.

After entering the required information, click the **Save** button. To enter more information, click the **Edit** button to display the **Care Worker Details** screen. This screen now has additional tabs for **Contact Details**, **Qualifications** and **Training**.

Contact Details

Click the **Contact** tab to enter the care worker's address, then click the **Save** button.

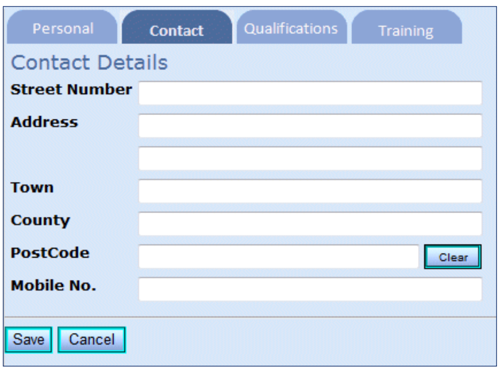


Figure 16 Contact Details tab

Qualifications

Click the **Qualifications** tab to enter details of any qualifications the care worker has obtained, and any they are requested or required to have.

Figure 17 Qualifications tab

1. Click the **Add** button for **Achieved Qualifications** or **Requested Qualifications**.

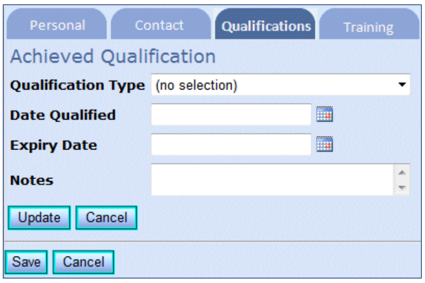


Figure 18 Add Qualifications

2. Select the **Qualification Type**.
3. In the **Date Qualified** field, enter the date the care worker achieved the qualification
4. If relevant, enter the qualification's **Expiry Date**.
5. Enter any additional information into the **Notes** field.
6. Click the **Update** button, then the **Save** button.

Qualification Types are added via **Admin | Manage Dropdowns | Care Workers | Qualification Types**.

Training

Click the **Training** tab to enter details of any training courses the care worker has attended.

Figure 19 Training tab

1. Click the **Add** button.

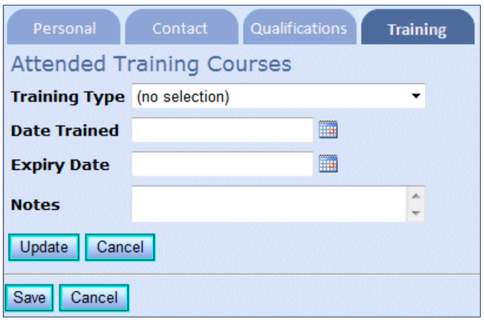


Figure 20 Add a Training Course

2. Select the **Training Type**.
3. In the **Date Trained** field, enter the date the care worker completed the training course.
4. If relevant, enter the course's **Expiry Date** (or the date when it needs to be renewed).
5. Enter any additional information into the **Notes** field.
6. Click the **Update** button, then the **Save** button.

Training Types are added via **Admin | Manage Dropdowns | Care Workers | Training Types**.

Health Visitors

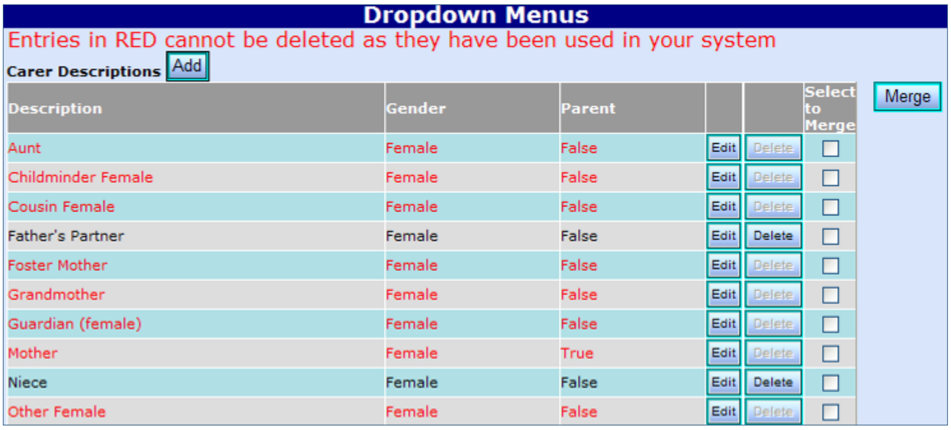
Health visitors are added via **Admin | Manage Dropdowns | Care Workers | Health Visitors**, or by selecting the **Health Visitor** check box on a care worker's personal details tab.

Health visitor details are entered in the same way as care workers, please see Care Workers on page *10* for more details.

> ***Note**: When you add a new health visitor via **Admin | Manage Dropdowns | Care Workers | Health Visitors**, the **Health Visitor** check box is selected by default and cannot be deselected. After the new record has been saved, the check box can be deselected if appropriate and the person is then identified in eStart as a care worker rather than as a health visitor.*

Carer Descriptions

Carer Descriptions are maintained via **Admin | Manage Dropdowns | Carer** | **Carer Descriptions**. They are used in the **Relation to Child** dropdown on the **Carer Details** page.



Description	Gender	Parent			Select to Merge
Aunt	Female	False	Edit	Delete	☐
Childminder Female	Female	False	Edit	Delete	☐
Cousin Female	Female	False	Edit	Delete	☐
Father's Partner	Female	False	Edit	Delete	☐
Foster Mother	Female	False	Edit	Delete	☐
Grandmother	Female	False	Edit	Delete	☐
Guardian (female)	Female	False	Edit	Delete	☐
Mother	Female	True	Edit	Delete	☐
Niece	Female	False	Edit	Delete	☐
Other Female	Female	False	Edit	Delete	☐

Figure 21 Carer Descriptions

1. Click the **Add** button to create a new entry:

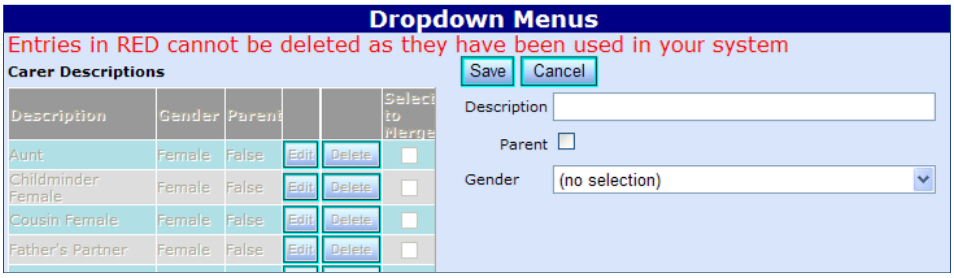
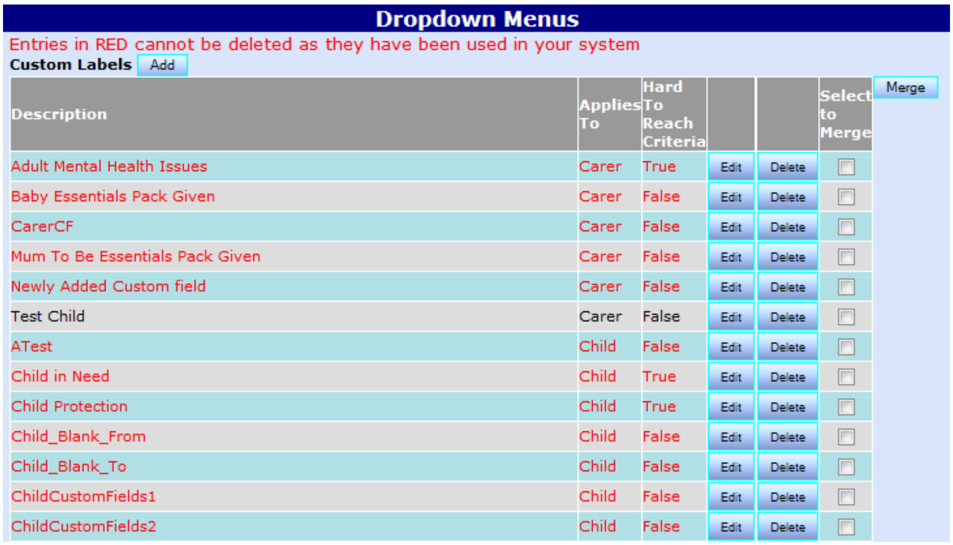


Figure 22 Add Carer Description

2. Enter a **Description**.
3. Select the **Parent** check box if carers with this description are to be identified as parents for the purposes of reporting.
4. Take care to select the appropriate entry from the Gender dropdown:
   - The gender that is associated with the selection from the **Relation to Child** dropdown indicates the gender of a carer. This determines the icon that is displayed on their details.
   - The **Carer | Health | Pregnancy** page is only displayed for carers with a female carer description.
5. Click the **Save** button.

Custom Labels

Custom Labels are maintained via **Admin | Manage Dropdowns | Custom Labels | Custom Labels**. Custom labels can be added to families, children and carers and can be custom labels or can be designated as hard to reach labels. Custom labels are added via the **Reason** dropdown in the **Custom Fields** area for the family, child or carer. Custom labels that have the **Hard to Reach** check box selected are added via the **Reason** dropdown in the **Hard to Reach** area for the family, child or carer.



Dropdown Menus

Entries in RED cannot be deleted as they have been used in your system

Custom Labels Add

Description	Applies To	Hard To Reach Criteria			Select to Merge
Adult Mental Health Issues	Carer	True	Edit	Delete	
Baby Essentials Pack Given	Carer	False	Edit	Delete	
CarerCF	Carer	False	Edit	Delete	
Mum To Be Essentials Pack Given	Carer	False	Edit	Delete	
Newly Added Custom field	Carer	False	Edit	Delete	
Test Child	Carer	False	Edit	Delete	
ATest	Child	False	Edit	Delete	
Child in Need	Child	True	Edit	Delete	
Child Protection	Child	True	Edit	Delete	
Child_Blank_From	Child	False	Edit	Delete	
Child_Blank_To	Child	False	Edit	Delete	
ChildCustomFields1	Child	False	Edit	Delete	
ChildCustomFields2	Child	False	Edit	Delete	

Merge

Figure 23 Custom Labels

1. Click the **Add** button to create a new entry:

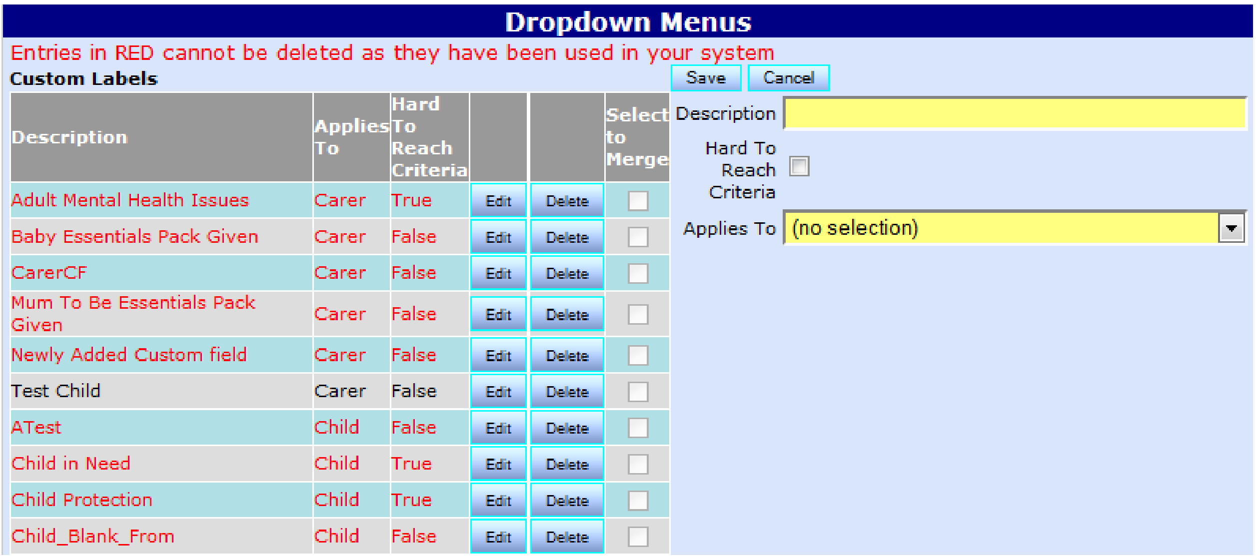


Figure 24 Add Custom Labels

2. Enter a **Description**.
3. If the label should appear in the **Hard to Reach** area, select the **Hard To Reach Criteria** check box.
4. Select the required **Applies To** option. This determines if the criteria can be applied to a family, child, carer or child and carer.
5. Click the **Save** button.

Development Plans

Development Plans are maintained via **Admin | Manage Dropdowns | Development Plans | Development Plans**.

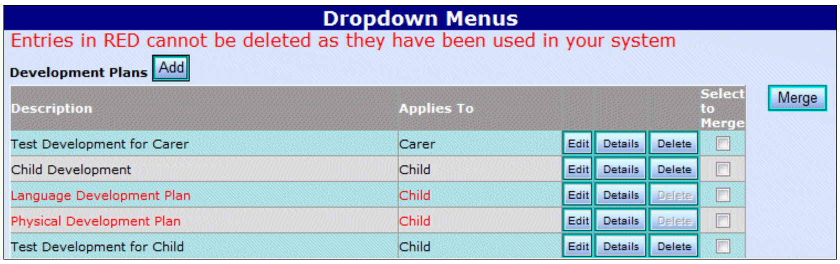


Figure 25 Development Plans

1. Click **Add** to create a new development plan.

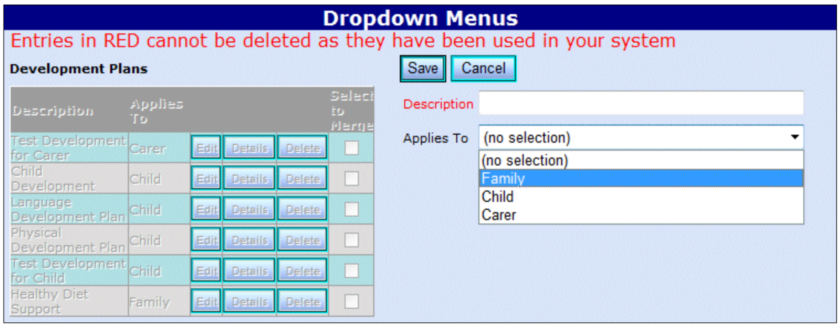


Figure 26 Add Development Plan Description

2. Enter a **Description** (mandatory).

3. Choose **Family**, **Child** or **Carer** from the **Applies To** dropdown. If you do not select which sort of members the plan applies to, then this development plan will not be available for selection within eStart.
4. Click **Save** to return to the list of development plans.
5. Before a plan can be used, it needs to have at least one milestone or goal added. Click the **Details** button for a plan, then click the **Add** button on the next screen to display the following fields:

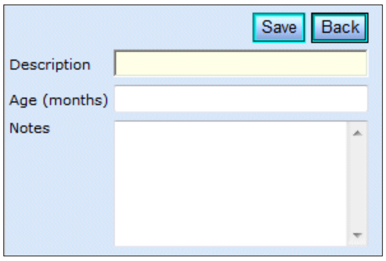


Figure 27 Add Details to the Development Plan

6. Enter the milestone or goal to be achieved in the **Description** field (mandatory). , the **Age** by which you would expect the milestone to be reached, and any notes (for example the expected outcome or the judgement criteria) in the field below.
7. Click the **Save** button.

The milestone is added to the details for this plan. You can now add more milestones if required.

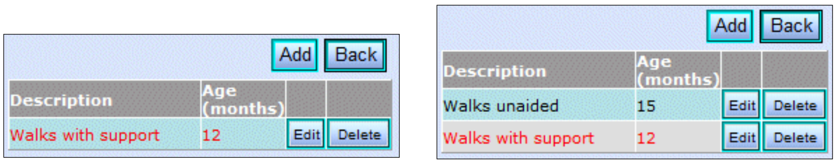
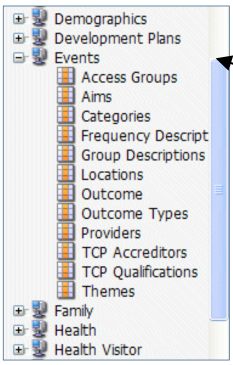


Figure 28 Milestones Added

Events

These dropdowns are used in the **Add Event Type** form (displayed via **Events | Add Event Type**). It is possible to add an event without populating any of these Event dropdowns, however Capita advise that you pre-populate them to save time when adding an **Event Type**.



The **Events** dropdowns are maintained via **Admin | Manage Dropdowns | Events**.

Figure 29 Admin | Manage Dropdowns | Events

Please note:

- In order to add and use **Outcomes**, you must first add **Outcome Types**.
- **Providers** should be linked to settings by clicking the **Add** or **Edit** button.

- TCP Accreditors and Qualifications should be added before TCP Courses are added via Events.

Disabilities

The **Disability** dropdown is maintained via **Admin | Manage Dropdowns | Health | Disabilities.** A suggested list is provided below, courtesy of Worcestershire County Council.

Angelman Syndrome	Dyspraxia
Asperger Syndrome	Eczema
Asthma	Epilepsy
Asthma Eczema	Febrile Convulsions
Asthma Eczema Epilepsy Speech Delay	Fits
Asthma Eczema High Food Intolerance	Hearing Impaired
Asthma/Speech Delay	Heart Problems
Ataxia	Heart Problems Oxygen Carried
Blind / Partially Sighted	Hirschsprung's Disease
Breathing Difficulties	Learning disability
Cerebral Palsy	Mental Health Difficulties
Chromosome Disorders	Microcephaly
Congenital Adrenal Hyperplasia	Mobility Problems
Cystic Fibrosis	Mobility/Learning/Slight Deafness/Speech Delay
Deaf/Hearing Impaired	Physical
Diabetic	Psychological
Disabled	Spina Bifida
Disabled - Unspecified	Tourette's Syndrome
Dyspraxia	Vision / Visually Impaired
Down's Syndrome	Wheelchair Use / Mobility Difficulties
Dyslexia	

Meaning of "Disability"

According to the [Equality Act 2010] (which replaced the [Disability Discrimination Act 1995]), a person has a disability if:

- They have a physical or mental impairment

  and

- The impairment has a substantial and long-term adverse effect on their ability to perform normal day-to-day activities

Special Needs

The **Special Needs** dropdown is maintained via **Admin | Manage Dropdowns | Health | Special Needs**. A suggested list is provided below courtesy of Worcestershire County Council.

Autistic Spectrum Disorder	Other Difficulty/Disability
Behaviour, Emotional & Social Development	Physical Disability
Behaviour, Emotional & Social Difficulties	Profound & Multiple Learning Difficulty
Cognition and Learning Difficulty	Sensory and/or Physical Needs
Communication and Interaction Needs	Severe Learning Difficulty
Hearing Impairment	Specific Learning Difficulty

Moderate Learning Difficulty

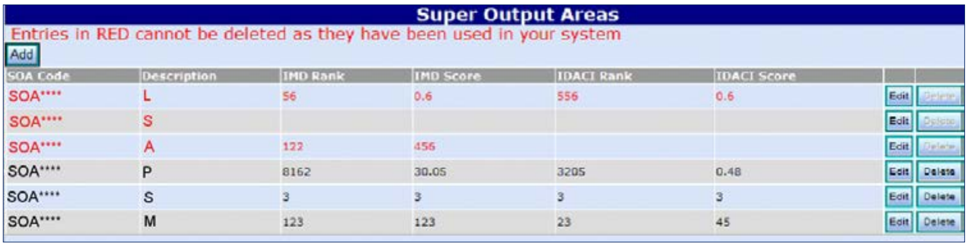
Multi-Sensory Impairment

Speech, Language and Communication Needs

Visual Impairment

GPs

The **GPs** dropdown is maintained via **Admin | Manage Dropdowns | Health | GPs**. You can use the doctor's name or the surgery name, however Capita One recommend that this choice is consistent for all GPs in the list.



Super Output Areas

Entries in RED cannot be deleted as they have been used in your system

Add

SOA Code	Description	IMD Rank	IMD Score	IDACI Rank	IDACI Score		
SOA****	L	56	0.6	556	0.6	Edit	Delete
SOA****	S					Edit	Delete
SOA****	A	122	456			Edit	Delete
SOA****	P	8162	30.05	3205	0.48	Edit	Delete
SOA****	S	3	3	3	3	Edit	Delete
SOA****	M	123	123	23	45	Edit	Delete

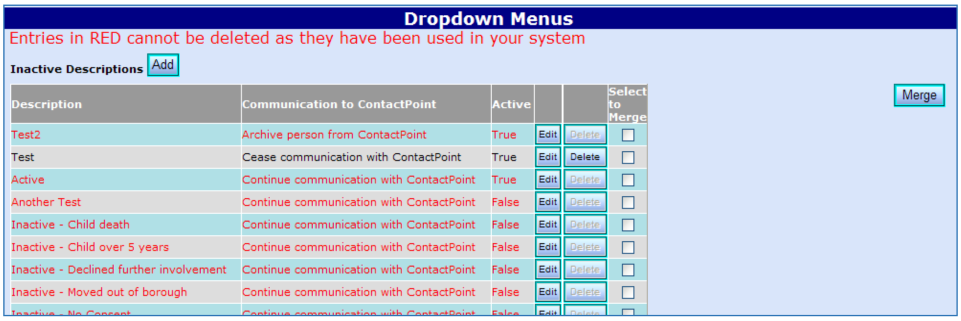
Figure 30 Edit GP

Member

All the options available via **Admin | Manage Dropdowns | Member** should be populated.

Inactive Descriptions

It is particularly important to take special care when defining the **Inactive Descriptions**. These are used in the **Status** dropdown on the **Carer** and **Child Details** screens:



Dropdown Menus

Entries in RED cannot be deleted as they have been used in your system

Inactive Descriptions Add

Merge

Description	Communication to ContactPoint	Active			Select to Merge
Test2	Archive person from ContactPoint	True	Edit	Delete	
Test	Cease communication with ContactPoint	True	Edit	Delete	
Active	Continue communication with ContactPoint	True	Edit	Delete	
Another Test	Continue communication with ContactPoint	False	Edit	Delete	
Inactive - Child death	Continue communication with ContactPoint	False	Edit	Delete	
Inactive - Child over 5 years	Continue communication with ContactPoint	False	Edit	Delete	
Inactive - Declined further involvement	Continue communication with ContactPoint	False	Edit	Delete	
Inactive - Moved out of borough	Continue communication with ContactPoint	False	Edit	Delete	

Figure 31 Member | Inactive Descriptions

Please Note:

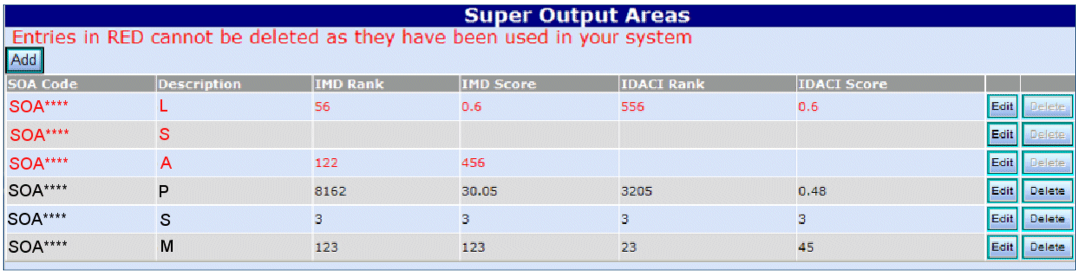
- When editing an inactive description, selecting or deselecting the **Active** check box makes the **person** active or inactive, not the reason itself.
- Duplicate **Inactive Descriptions** can be merged.
- When a member is made inactive (by changing the **Status** on the **Carer** or **Child Details** screen) you are warned that all open affiliations and registrations will be ended. If you continue, then all involvements for this member that do not have an end date or that have an end date in the future have their end date set to today's date.
  The **Involvement End** date is displayed (and can be edited) in the **Involvement Ended** field on the **Setting Involvement Details** screen. This is opened when the **Registration and Affiliation Details** button on the **Family** screen is clicked.

Super Output Areas

A Super Output Area (SOA) is a unit of geography used in the UK for statistical analysis. SOAs are developed and released by Neighbourhood Statistics (part of the Office for National Statistics).

SOAs are maintained in eStart via **Admin | Manage Dropdowns | Postcodes/Settings | Super Output Areas.**

The Super Output Areas used in eStart reporting are lower layer areas. These have a minimum population of 1000 and a mean population of 1500. They are built from groups of output areas and are commonly known as **Lower Layer Super Output Areas** (LSOA).


Super Output Areas

Entries in RED cannot be deleted as they have been used in your system

Add

SOA Code	Description	IMD Rank	IMD Score	IDACI Rank	IDACI Score		
SOA****	L	56	0.6	556	0.6	Edit	Delete
SOA****	S					Edit	Delete
SOA****	A	122	456			Edit	Delete
SOA****	P	8162	30.05	3205	0.48	Edit	Delete
SOA****	S	3	3	3	3	Edit	Delete
SOA****	M	123	123	23	45	Edit	Delete

Figure 32 Postcodes/Settings | Super Output Areas

Indices of Deprivation

Indices of deprivation are used to analyse patterns of deprivation, identify areas that would benefit from special initiatives or programmes and as a tool to determine eligibility for specific funding streams[1].

When you add SOAs to eStart there are two **Indices of Deprivation** that you can enter:

- **IMD (Index of Multiple Deprivation)**: This combines a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each SOA. This allows the areas to be ranked relative to one another according to their level of deprivation.
- **IDACI (Income Deprivation Affecting Children Index)**: This is a supplementary index representing the proportion of children aged 0-15 who live in income deprived households. It ranges from 0.00 (least deprived) to 0.99 (most deprived).

Adding a New Super Output Area

1. Click the **Add** button to display the **Add Super Output Areas** page.

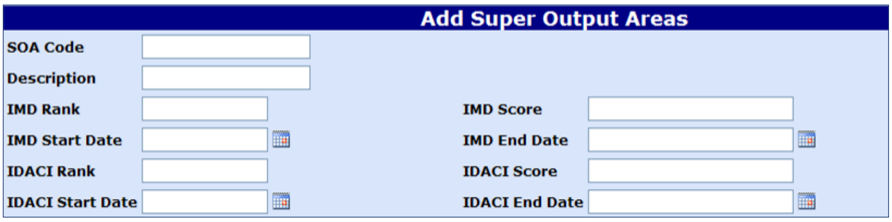


Figure 33 Adding Super Output Areas and their associated Indices of Deprivation

2. Enter the **SOA Code** (mandatory) and **Description**.

***Note**: The **SOA Code** cannot be edited later.*

3. Complete the **IMD** fields and the **IDACI** fields.
4. Click the **Save** button.

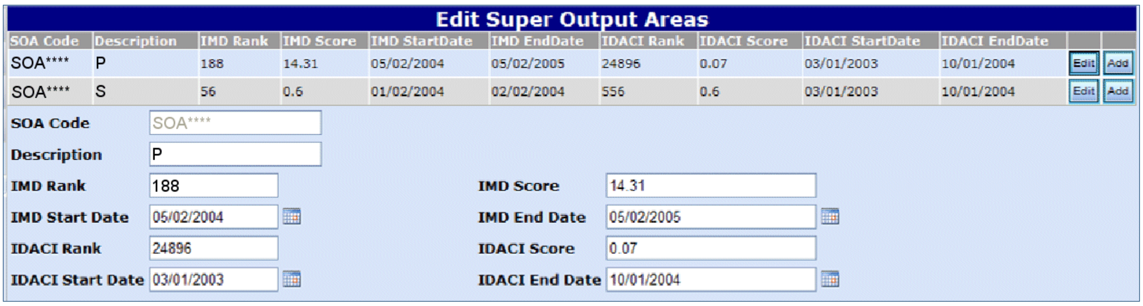
Editing a Super Output Area

To change or add details:

[1] www.communities.gov.uk/communities/neighbourhoodrenewal/deprivation/

1. Follow the route **Admin | Manage Dropdowns | Postcodes/Settings | Super Output Areas** to display the **Super Output Areas** page (Figure 32).
2. Click the **Edit** button to display the **Edit Super Output Areas** page (Figure 34).
3. Click the **Edit** or **Add** button for the SOA you wish to change or add data to.

***Note**: The **SOA Code** cannot be edited.*



Edit Super Output Areas

SOA Code	Description	IMD Rank	IMD Score	IMD StartDate	IMD EndDate	IDACI Rank	IDACI Score	IDACI StartDate	IDACI EndDate		
SOA****	P	188	14.31	05/02/2004	05/02/2005	24896	0.07	03/01/2003	10/01/2004	Edit	Add
SOA****	S	56	0.6	01/02/2004	02/02/2004	556	0.6	03/01/2003	10/01/2004	Edit	Add

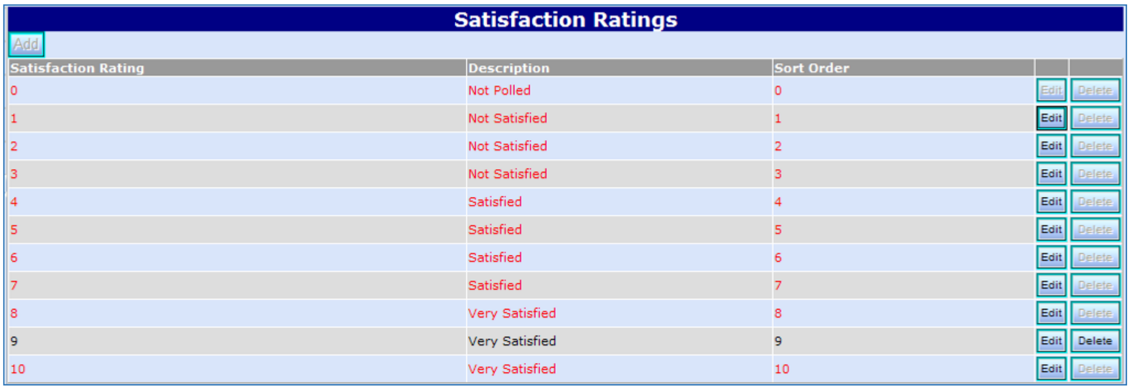
SOA Code	SOA****		
Description	P		
IMD Rank	188	IMD Score	14.31
IMD Start Date	05/02/2004	IMD End Date	05/02/2005
IDACI Rank	24896	IDACI Score	0.07
IDACI Start Date	03/01/2003	IDACI End Date	10/01/2004

Figure 34 Editing Super Output Areas

Satisfaction Ratings

Event **Satisfaction Ratings** are maintained via **Admin | Manage Dropdowns | Satisfaction Ratings** These are available to users via **Events | View Event Types**, by clicking the **Satisfaction** button for an event type.

Satisfaction Ratings are supplied with the installation (10 is most satisfied, 1 is least satisfied). The description, sort order and satisfaction ratings can be amended. Amending the satisfaction rating scores is not advised, however if necessary you can create descriptions that are appropriate for your use.



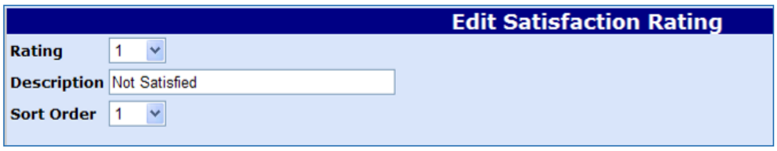
Satisfaction Ratings

Add

Satisfaction Rating	Description	Sort Order		
0	Not Polled	0	Edit	Delete
1	Not Satisfied	1	Edit	Delete
2	Not Satisfied	2	Edit	Delete
3	Not Satisfied	3	Edit	Delete
4	Satisfied	4	Edit	Delete
5	Satisfied	5	Edit	Delete
6	Satisfied	6	Edit	Delete
7	Satisfied	7	Edit	Delete
8	Very Satisfied	8	Edit	Delete
9	Very Satisfied	9	Edit	Delete
10	Very Satisfied	10	Edit	Delete

Figure 35 Satisfaction Ratings

Click the **Edit** button to amend the **Description**, **Sort Order**, and **Satisfaction Ratings**:



Edit Satisfaction Rating

Rating	1
Description	Not Satisfied
Sort Order	1

Figure 36 Edit Satisfaction Ratings

Entries in red cannot be deleted as they have been used in your system. Entries in black have not yet been used and can be deleted by clicking the **Delete** button.

Initially, the **Add** button is disabled because the maximum number of ratings is 11 (0 = not polled, followed by 1 - 10). If you delete a rating, the **Add** button is enabled.

Warning Descriptions

Warnings are maintained via **Admin | Manage Dropdowns | Warning Descriptions** and are added to a person on their **Carer Details** page.

If a warning has been added to a carer, a warning icon (yellow triangle) is displayed on the **Family** screen.

Duplicate warnings can be merged.

Dropdown Menus

Entries in RED cannot be deleted as they have been used in your system

Warning Descriptions Add

Merge

Description	Highlight on family screen for this warning			Select to Merge
Beware of Dog/pets	True	Edit	Delete	☐
Child behavioural difficulties	True	Edit	Delete	☐
Child collected by named person only	True	Edit	Delete	☐
Child protection issues	True	Edit	Delete	☐
Domestic abuse	True	Edit	Delete	☐
Drug/alcohol abuse	True	Edit	Delete	☐
Serious health issues/illness	False	Edit	Delete	☐
Violent & agressive	True	Edit	Delete	☐
Visit in Pairs only	True	Edit	Delete	☐

Figure 37 Add/Edit Warnings

Change Reasons

Change reasons enable you to track changes to members' details. A history is kept of these changes.

- **Name Change** reasons are managed via **Admin | Manage Dropdowns | Member | Name Change Reasons**.
- **Smoking Change** reasons are managed via **Admin | Manage Dropdowns | Health | Smoking Change Reasons**.

Ethnicity Codes

The **Ethnicity** and **Sub-Ethnicity** codes (selected on the **Carer Details** and **Child Details** pages) are pre-populated and cannot be edited. They are maintained by Capita One to comply with the definitions published by the DfE, so are not available via **Admin | Manage Dropdowns**.

In order to distinguish between a former ethnicity and the corresponding sub-ethnicity value, the **Other Ethnic Info** field is populated:

Other Ethnic Info E: African S: South African

- **E**: indicates the Ethnicity, the former main **Ethnicity** code.
- **S**: indicates the Sub-Ethnicity, the former **Sub-Ethnicity** code.

Merge Dropdown Items

If you have duplicate or redundant entries in your eStart dropdowns, they can be merged by a console administrator. This is not possible with all dropdowns, for example **Satisfaction Ratings** and **Super Output Areas** cannot be merged. This is a separate process from the main **Merge** function, which is described in detail in the **eStart Web User Handbook**.

1. Select the **Select to Merge** check box for the items you intend to merge.

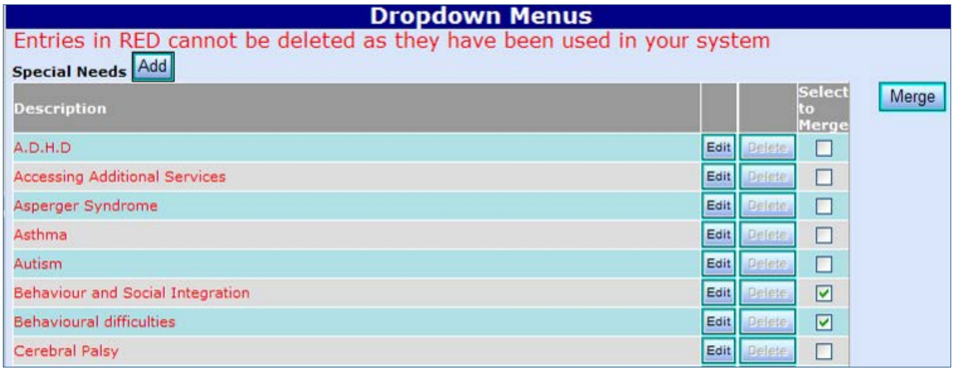


Figure 38 Merge Dropdown Items

2. Click the **Merge** button. The following screen is displayed:

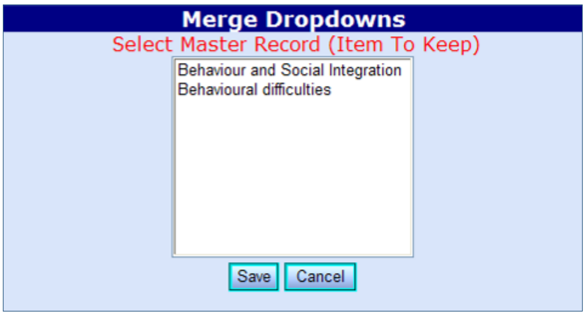


Figure 39 Merge Dropdown Items – Select Master Record

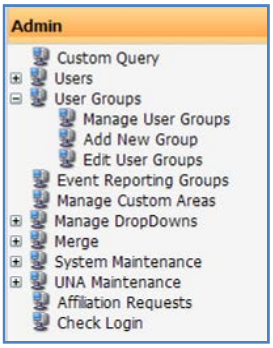
3. Select the item in the list that you wish to keep. This is the **Master Record**.
4. Click the **Save** button.

   All records in eStart with the other item(s) recorded against them are changed to the master record, and only the master record is now listed in the dropdown for selection in the future.

04 | User Groups, Permissions and Security

eStart User Groups and Permissions

Before users can be created, you must set up eStart **User Groups**. These enable you to group together users with the same level of access permissions to eStart data. For example, you might set up user groups for administrators, information officers or data entry clerks. Each user account is assigned to one of these user groups.



Go to **Admin | User Groups | Edit User Groups** to see a list of groups as shown in the examples below.

eStart is initially set up with the default user groups as shown in Figure 40:

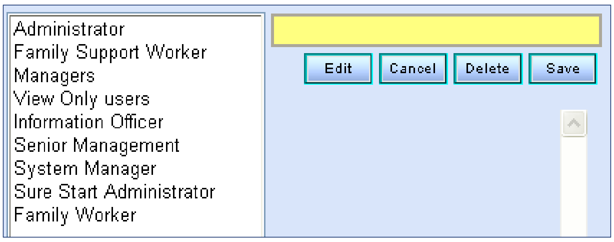


Figure 40 Default User Groups

You can modify the default user groups for your own needs, add new user groups or delete them all and start from scratch. Figure 41 displays an example at an authority where the default user groups have been deleted and five new groups set up, to comply with their own five levels of access:

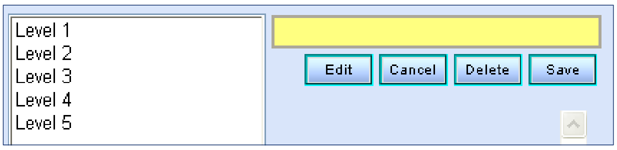


Figure 41 Example of Modified User Groups

Add or Edit User Groups

- To add a new user group, click **Admin | User Groups | Add New Group**, type in the user group name and click the **Save** button.

- To edit an existing user group, click **Admin | User Groups | Edit User Groups**.

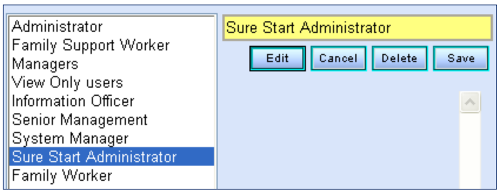


Figure 42 Edit User Groups

- To change the name, select the group to highlight it and click the **Edit** button. Type in the new name and click the **Save** button.
- To delete a user group, select the group to highlight it and click the **Delete** button. If there are members in the group you cannot delete it. A message is displayed showing you which users are in the group.

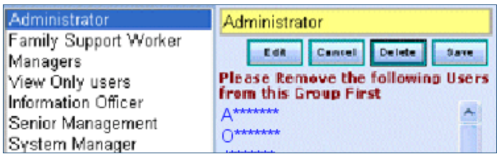


Figure 43 Remove Users from Group

You must then open each user account via **Admin | Users | Manage Users** and modify the settings access for that user, removing them from the group. See Managing User Groups on page *24* for more details. The user group itself can then be deleted.

Managing User Groups

After the user group names are added, you need to edit the permissions and decide which level of access each group should have.

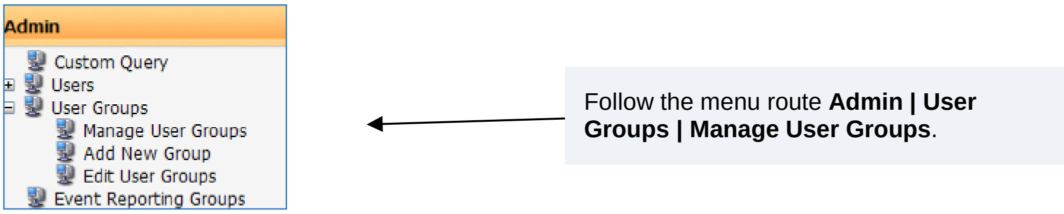


Figure 44 Admin | User Groups

1. Select **Admin | User Groups | Manage User Groups** to display the **User Groups** page. Select the **User Group** whose permissions you wish to edit.

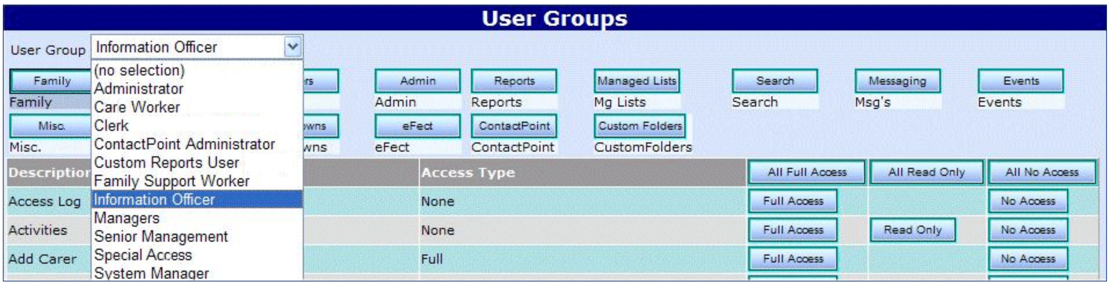


Figure 45 Select User Group

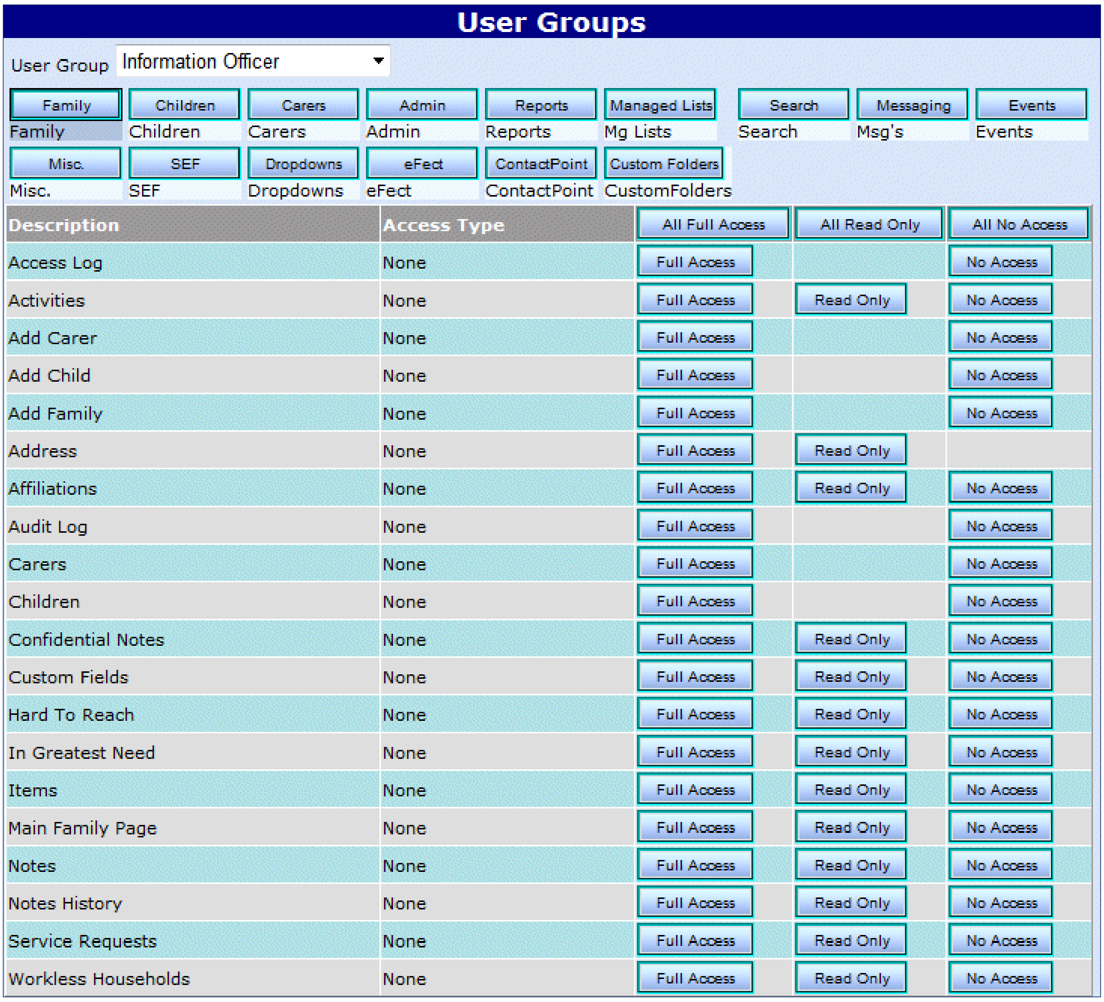
2. Select the permissions area from the eStart areas at the top of the page by clicking the relevant button. A list of permissions is displayed, as in Figure 46. This example uses the **Family** tab (the **Family** button is highlighted).

3. Click the **Full Access**, **Read Only** or **No Access** button as appropriate to display the selected option in the **Access Type** column.

   The following permissions are available:

   - **Full Access**: the group members can add, edit and delete data.
   - **Read-Only**: the group members can view, but not modify, the data.
   - **No Access**: the group members cannot see or report on the data. This is the default level of access. These fields and buttons are greyed out and inactive for this group of users.

> ***Note**: This is an immediate change and is effective the next time the user logs in.*



User Groups

User Group: Information Officer

Family	Children	Carers	Admin	Reports	Managed Lists	Search	Messaging	Events
Family	Children	Carers	Admin	Reports	Mg Lists	Search	Msg's	Events
Misc.	SEF	Dropdowns	eFect	ContactPoint	Custom Folders			
Misc.	SEF	Dropdowns	eFect	ContactPoint	CustomFolders			

Description	Access Type	All Full Access	All Read Only	All No Access
Access Log	None	Full Access		No Access
Activities	None	Full Access	Read Only	No Access
Add Carer	None	Full Access		No Access
Add Child	None	Full Access		No Access
Add Family	None	Full Access		No Access
Address	None	Full Access	Read Only	
Affiliations	None	Full Access	Read Only	No Access
Audit Log	None	Full Access		No Access
Carers	None	Full Access		No Access
Children	None	Full Access		No Access
Confidential Notes	None	Full Access	Read Only	No Access
Custom Fields	None	Full Access	Read Only	No Access
Hard To Reach	None	Full Access	Read Only	No Access
In Greatest Need	None	Full Access	Read Only	No Access
Items	None	Full Access	Read Only	No Access
Main Family Page	None	Full Access	Read Only	No Access
Notes	None	Full Access	Read Only	No Access
Notes History	None	Full Access	Read Only	No Access
Service Requests	None	Full Access	Read Only	No Access
Workless Households	None	Full Access	Read Only	No Access

Figure 46 User Group Permissions (Family area selected)

4. Repeat the above for all the remaining areas (**Children**, **Carers**, **Admin** etc.), ensuring that you select the appropriate level of access for the selected user group.

> ***Note**: In some cases there is no **Read Only** or **No Access** option, due to the nature of the data.*

eStart Users

With the user groups configured, you can begin to create user accounts. Click **Admin | Users** in the left-hand menu. Now you can either:

- Click **Admin | Users | Manage Users** to display the **Administration** screen. If any users have already been added, they are listed on this screen. You need to search the list to check whether or not the new user already has an eStart account. See Search and Edit eStart Users on page *26*. Once you have confirmed that they do not yet have an account, click the **Add User** button on this page to display the **Add New User** page.

  or

- If you know their details aren't on eStart, click **Admin | Users | Add User** to go straight to the **Add New User** page. See Add a New eStart User on page *27*.

Figure 47 User Administration

Search and Edit eStart Users

1. Choose the setting (if known).
2. Choose the order in which the results are displayed, selecting from **First Name**, **Surname** (the default) or **User Name**, and from alphabetical (the default) or reverse alphabetical order.
3. Enter the search criteria, e.g. **First Name** or **Surname**.
4. Click the **Search** button to display the results.
5. To clear the search fields and search again, click the **Reset** button.

To change the settings and user groups for an existing user, click the **Edit** button next to their user name (see Figure 47) to open their details page, then click the **Settings** button as described in the next topic, Add a New eStart User.

Add a New eStart User

To add an account, click **Add User**. The **Add New User** screen is displayed:

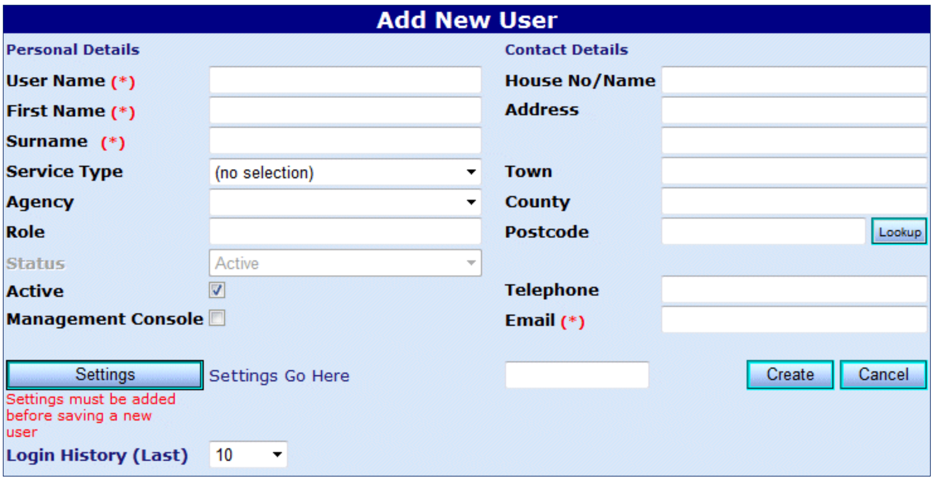


Figure 48 Add New User

1. Complete the account information, noting the following:
   - **User Name**, **First Name**, **Surname** and **Email** are mandatory.
   - The **Active** check box is selected by default. Deselect the check box if the account is not to be used immediately.
   - The **Management Console** check box should be selected only for the senior eStart Administrators. We recommend that no more than three users have this level of access.
2. Click the **Settings** button to configure this user's access to eStart.

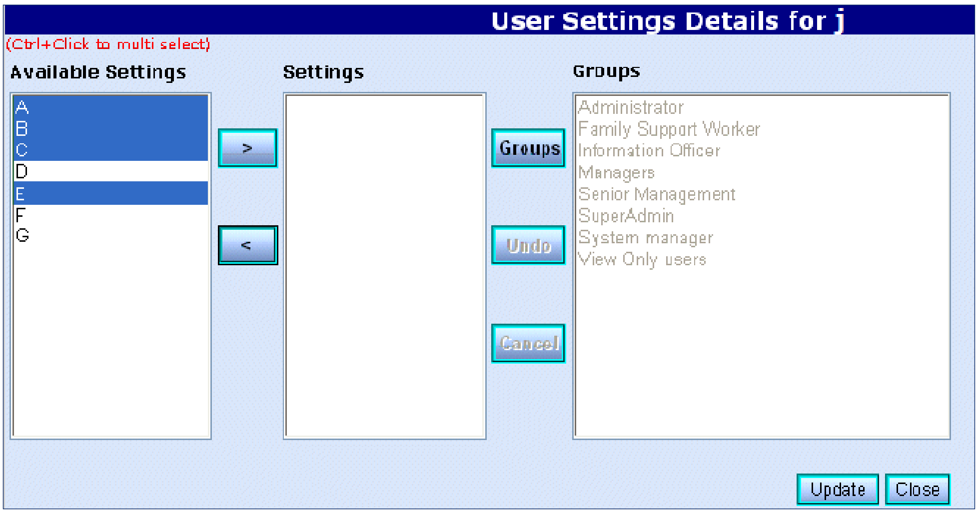
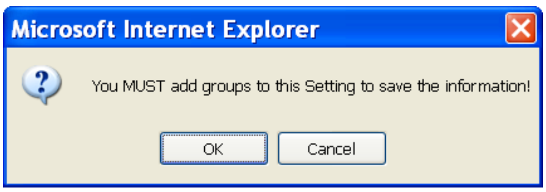


Figure 49 Select Settings for a User

3. Click the setting you wish to add for this user in the left-hand list. To select more than one setting, use **Ctrl + click** or **Shift + click**.
4. Click the blue arrow button. The following reminder is displayed:



5. Click the **OK** button to move the selected settings into the centre **Settings** list.

   You now need to select user groups for this person at these settings.
6. Highlight the settings you wish to configure and click the **Groups** button.
7. Allow the screen to refresh.
8. Select the appropriate user group in the right-hand list and click the **Update** button.

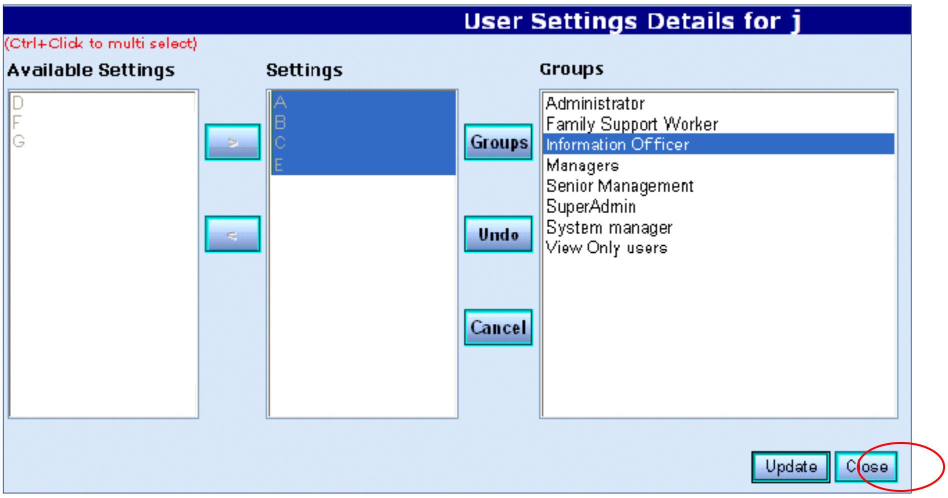


Figure 50 Group selected for a user at their settings

9. If necessary you can now add more settings and groups for this user. See [Configuring Multiple Setting Access](#) on page *29*. When you have finished, click the **Close** button.

   The new user account has now been created and the **Add New User** screen is displayed as the **Registration Details** screen.

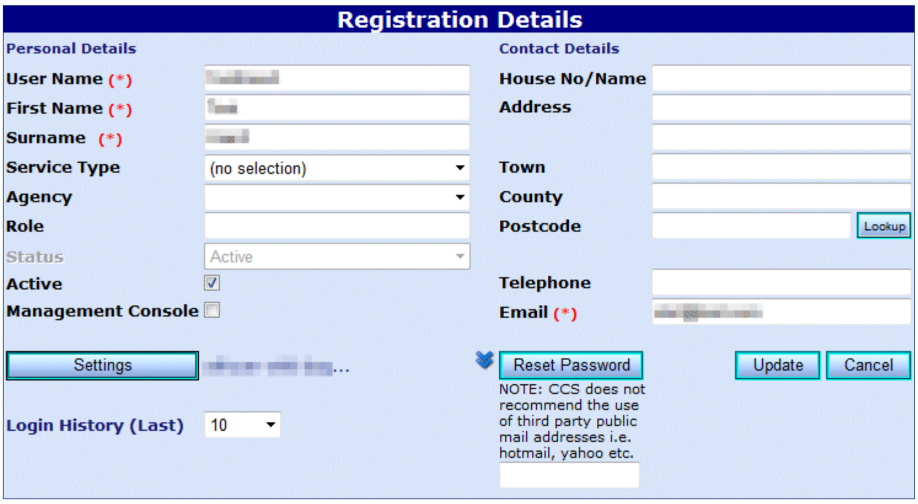
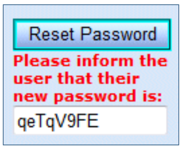


Figure 51 Registration Details

   Please note that if more than one setting has been added, only the name of the first one is visible to the right of the **Settings** button, followed by an ellipsis (…). Click the blue down arrows to the right of the setting name to display a list of all the settings for this user.

10. Finally, click the **Reset Password** button to generate an initial password for this user. The new password is displayed on screen and is sent to the user by email. They must change this password the first time they log on.



Configuring Multiple Setting Access

eStart is flexible and allows you to easily set up different permissions levels for users for different settings. In the example in Figure 50, the user has **Information Officer** access to four settings. If you wish to give **Administrator** access to the remaining settings, highlight the next group of settings you would like to configure, click the **Groups** button and select **Administrator**. Repeat this process, to configure any setting to use any user group.

When you click on a setting name, the relevant group (access level) is highlighted.

eStart Permissions and Security

Console Manager

This gives **Super Administrator** permissions for every setting. If a user is given the **Console Manager** role (the **Management Console** check box is selected on their **Registration Details** page), they have full access and permissions to all functionality at every setting across the authority (database). This user cannot change their user groups or permissions. The **Console Manager** role is designed for authority-wide users, so care must be taken when assigning someone to this role.

Super Admin

A user can be set to be a **Super Admin** (SA) user at one or more settings. SA users have full access and permissions for every function at the setting that they are a super admin user for. This means that a user could be a SA user at one setting and an administrator at one or more other settings.

The **Super Admin** group's permissions cannot be modified.

Administrator

An **Administrator** is similar to a super admin user, except that by default **User Management**, **User Access Groups** and **Requested Affiliations** are not included. This group can be edited, renamed or even removed if you wish. An administrator with full access to all options is identical to a super admin user.

Who can do what?

- Super Admin and Management Console users (or someone who has permissions to **Manage Users**) are the only people who can change other users' permissions (unless a user has been upgraded to have full **Manage Users** permissions).
- Only Console Managers have permissions to choose who is to be a Console Managers.
- Only Super Admins can choose who is a Super Admin (they cannot upgrade their own accounts to console manager).
- Normal users with access to manage users cannot upgrade their own accounts.

Passwords

In order for eStart accounts to be as secure as possible, passwords must:

- Be a minimum of eight characters.
- Contain at least one number

- Contain at least one capital letter (A-Z)

When you add a new user, you need to generate their first password. This is emailed to them so that they can log into to eStart. The first time they log in they have to change their password.

See eStart Timings on page *48* for information about password expiry settings and session timeouts.

Reset Password

User passwords are only visible on screen when the **Reset Password** button on **Admin | Users | Manage Users | Edit** is clicked to generate a new password. The new password is then automatically emailed to the user. Passwords can be reset by a console manager, super admin or any user in a group with **Manage User** access.

Change Password

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

They must enter their current password (the one they have just used to log in) and their new password and retype the new password to confirm it. These two versions of the new password must be identical; this is case sensitive.

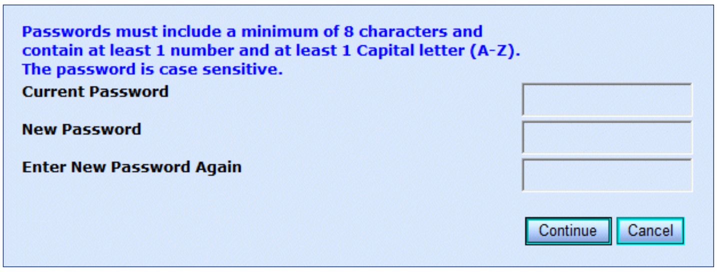


Figure 52 Change Password

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

- They must be a minimum of eight characters long
- They must contain at least one number
- They must contain at least one capital letter (A-Z)

Security Questions and Answers

An extra level of security may be implemented when users log in to eStart. This requires them to answer one of a series of questions to which they have previously supplied the answers.

This function is only available on request. Contact the One Technical Support team at onetechnicalsupport@capita-cs.co.uk to ask for it to be enabled. The request must be made ahead of time because this is carried out on a scheduled basis.

Once the security answer function has been enabled, the login screen displays a security question and an answer field:

Figure 53 eStart Web login page (with extra security question)

This extended version of the login screen asks for the user's user name and password as before, but also asks them to answer one of a series of questions that they have answered previously. The first time they see this screen they are able to record their answers (which they can change later if necessary), as described below.

- If they have previously entered answers to the extra security questions in eStart, they should type the correct answer in the box and click the **Login** button.
- If a user has not previously entered any answers to the security questions, then they must not type anything into the **Answer** field. They need to enter their user name and password as usual and click the **Login** button. A screen is then displayed where they must type their answers to the security questions. Once they have entered all the answers they are logged in as usual. The next time they log in they will be asked one of these questions, selected at random.

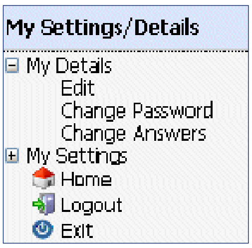
The security questions are:

- Where were you born?
- Mother's Maiden Name?
- Favourite Pet?

You must emphasise to the users that they must give answers that they will be able to remember, and that are spelt correctly. This is important for two reasons:
1 If they give an incorrect or differently spelt answer when they try to log in next time, their login will fail.
2 It is not currently possible to reset a user's answers if they forget them.

Change Security Answers

If a user needs to change their answers to the security questions they can do this after logging in.



To change the answers to the security questions, go to My Settings/Details, then My Details and click on **Change Answers**.

If the extra security question has not been activated in your version of eStart you will not see this menu option.

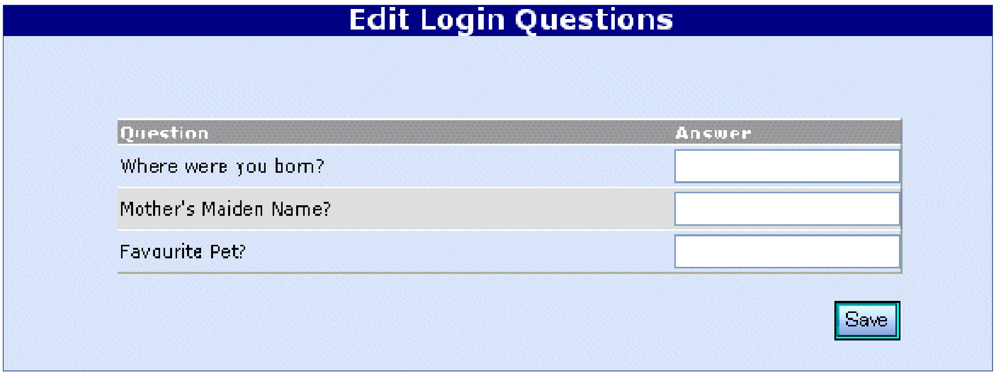


Figure 54 Changing your answers to the security questions

The new answers should be typed in and saved. Again, it is very important that the answers are memorable and correctly spelt or the user might not be able to log in next time, and these answers cannot currently be reset.

05 | Merging and Moving

Merging and Moving

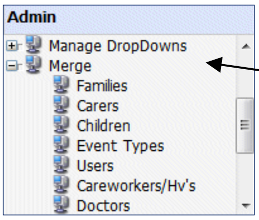
The merge functionality in eStart enables users to:

- Manage duplicate families, carers or children.
- Move children or carers to another family.

It can also be used to merge other duplicate data items:

- Event types
- eStart users
- Care workers and health visitors
- Doctors.

When data is merged, it is preserved or deleted according to the options selected by the user.



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

Figure 55 Admin | Merge

For full details of how to use the merge tools, see the *eStart Web User Handbook*.

Who should be Merging Data?

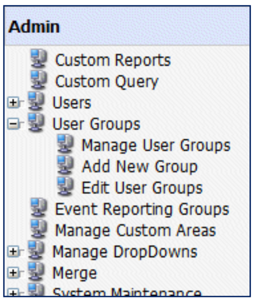
As part of your data cleansing strategy you should consider who will be responsible for dealing with duplicate family data in the eStart database and set up the user permissions accordingly.

Capita One suggests the following management options:

- **Centralised**: An information team at the Local Authority are responsible for all merges.
- **Decentralised**: One person per children's centre is responsible for all merges at their centre.

In all cases training is vital as this feature enables users to completely remove individual carers, children and entire families from the eStart database.

Configuring Permissions for Merging and Moving



To configure user access to the merge options, follow the menu route **Admin** | **User Groups** | **Manage User Groups**.

1. Select the **User Group** from the dropdown.

2. Click the **Admin** button to display the **Admin** tab
3. Click the **Full Access** or **No Access** button for all the **Merge** options in the list of descriptions. See Figure 56, below.

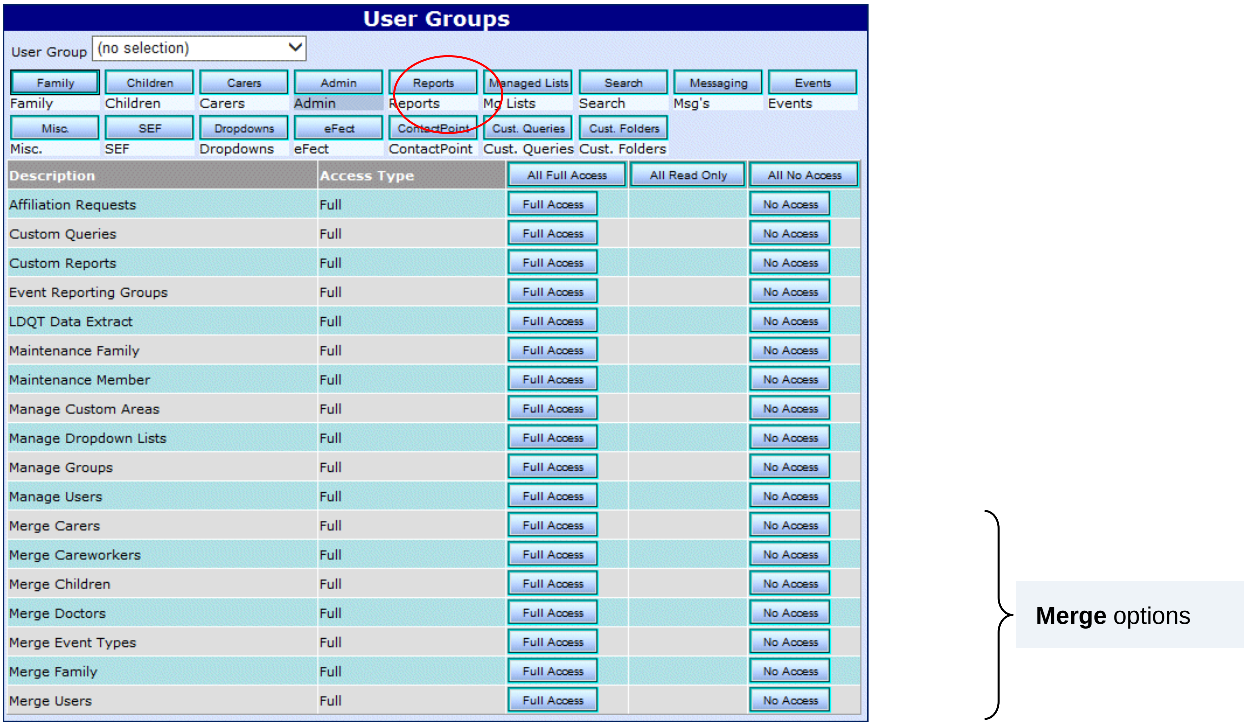


Figure 56 Configuring Access to Merge Features

If **No Access** is set for a user group, the option is greyed out for the members of that group.

06 | Custom Queries

Custom Queries Overview

A custom query is a single, predefined SQL statement, that enables data to be retrieved from the relevant tables in the database and displayed on-screen in a table. The data can also be exported to a .csv file for manipulation and further analysis outside eStart. Custom queries can be written by Capita at a customer's request or added by an eStart administrator.

Custom Queries are mainly used for simple SELECT statements, however it is also possible to perform basic functions such as COUNTs and SUMs. Runtime parameters can also be defined and selected and these can then be used to further tailor the query output, e.g. a setting can be selected from a dropdown list and data returned for only that setting.

> ***Note:*** *The custom query functionality is not as powerful as reporting packages such as Crystal Reports and there is no support for groupings or sub reports, therefore breakdowns of data and totals cannot be included.*

- Users can run custom queries via **Reports | Custom Queries**.
- Administrators can manage custom queries via **Admin | Custom Query**.

Custom Query Repository

Custom queries that have been written for other Local Authorities are stored in the **Custom Query Repository**. Administrators at hosted customers who have sufficient permissions can view and import custom queries from the repository. These can be edited if necessary before being run.

Custom Query Administration

The **Admin | Custom Query** route enables administrators to:

- Run custom queries. See Running Custom Queries on page *39*.
- View and amend the details of custom queries. See Managing Custom Queries on page *36*.
- Delete custom queries.
- Assign permissions to view and run custom queries to user groups or individual users.
- Import custom queries from the repository and amend them as appropriate (hosted customers only).
- Re-import custom queries that have been modified by Capita One since import.
- Add new **Select** custom queries.

Custom Query Search

Select **Admin | Custom Query** to display the **Custom Queries** screen.

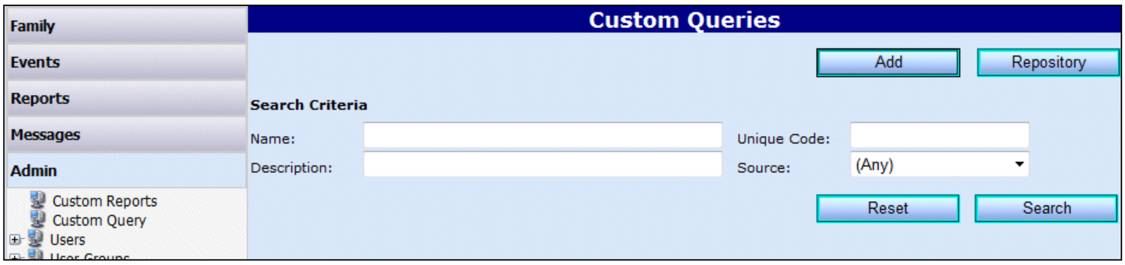


Figure 57 Admin | Custom Query | Search

This screen enables you to search all the custom queries that are currently in your eStart system. This includes queries that were originally created for your organisation, and those that have been imported from the repository.

1. Enter part or all of the **Name**, **Description** or **Unique Code**.
2. Select the **Source** from the drop-down list. The **Source** options are:
   - **Any**: All custom queries available to your users.
   - **Internal**: Custom queries that were originally written for your organisation.
   - **Repository**: Custom queries that were originally written for another organisation and have been imported from the repository into your eStart system.
3. Click the **Search** button to display the results.

Click the **Reset** button to clear the search criteria and enable a new search.

Managing Custom Queries

The **Custom Queries** screen lists all the queries returned by the search.

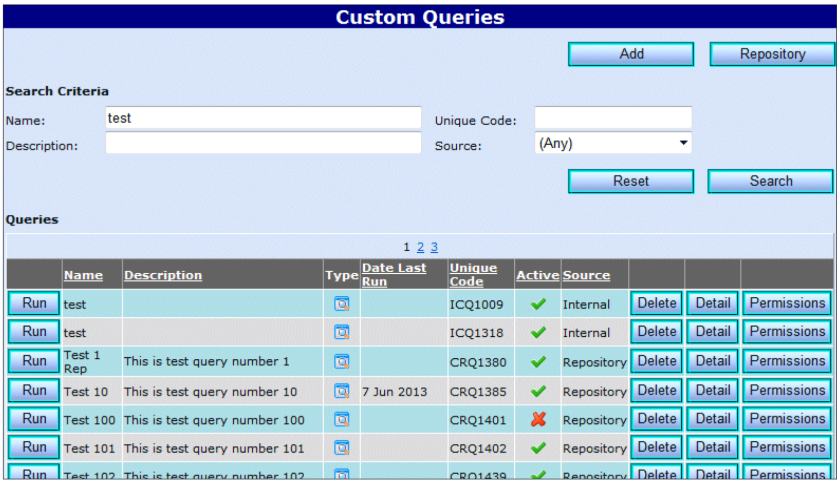


Figure 58 Custom Queries– search results

The list can be ordered by **Name**, **Description**, **Date Last Run**, **Unique Code**, **Active** check box or **Source**, by clicking the relevant column title.

The following actions can be carried out:

- Clicking the Add button displays the **Custom Query Management – New Query** screen. See Adding Custom Queries on page *40*.

- The **Add** button is only displayed for users with full access to the **Details** permission, and is only active for users who also have full access to the **SQL Content** permission.
- Clicking the **Repository** button displays a searchable list of all custom queries that are available for import from the repository. See Custom Query Repository on page *41.*

  Individual custom queries can be managed from this screen.
- Clicking the **Run** button for a query either:
  - Displays the **Inputs** screen, enabling you to select parameters before running the query, or
  - Displays the **Select Query Output** screen if no parameters are available for selection.

  See Running Custom Queries on page *39*.
- Clicking the **Delete** button removes the custom query from your eStart system and returns it to the repository.

  The query can be re-imported if necessary, however any edits to the **Detail**, **Permissions** that were previously assigned, and the **Date Last Run**, are lost when the query is deleted.
- Clicking the **Permissions** button displays the **Custom Query Run Permissions** screen, enabling you to give permissions to users and user groups to run the query. This is also available on the **Custom Query Management** screen. See Custom Query Run Permissions on page *38*.
- Clicking the **Detail** button displays the **Custom Query Management** screen.

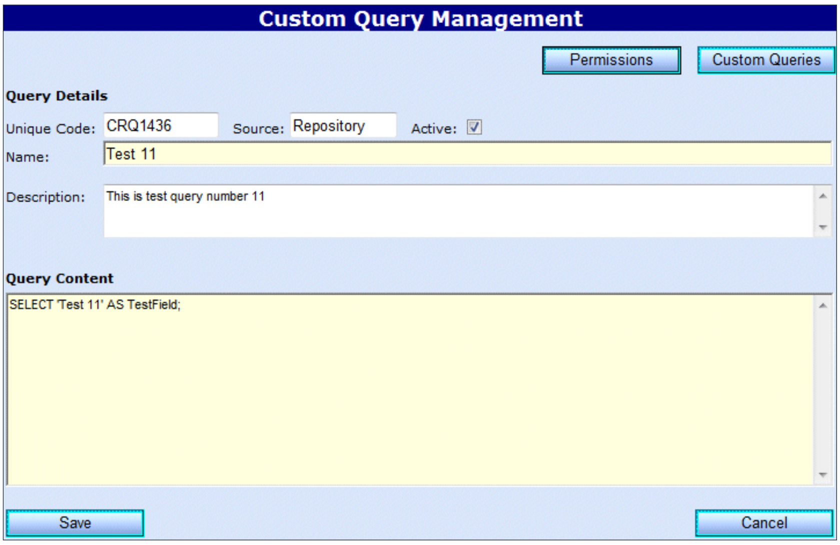


Figure 59 Custom Query Management screen

Users with appropriate permissions can edit the **Name**, **Description** and **Query Content** and can select or deselect the **Active** check box. They can also assign run permissions by clicking the **Permissions** button to display the **Custom Query Run Permissions** screen. See Custom Query Run Permissions on page *38*.

Note: *eStart does not validate* ***Query Content*** *(SQL statement)*

If any of the details are edited and the query is subsequently deleted to return it to the repository, the edits are lost.

Custom Query Run Permissions

Clicking the **Permissions** button enables users with full **Manage Run Permission** permissions to grant **Custom Query Run** permissions to user groups or individual users.

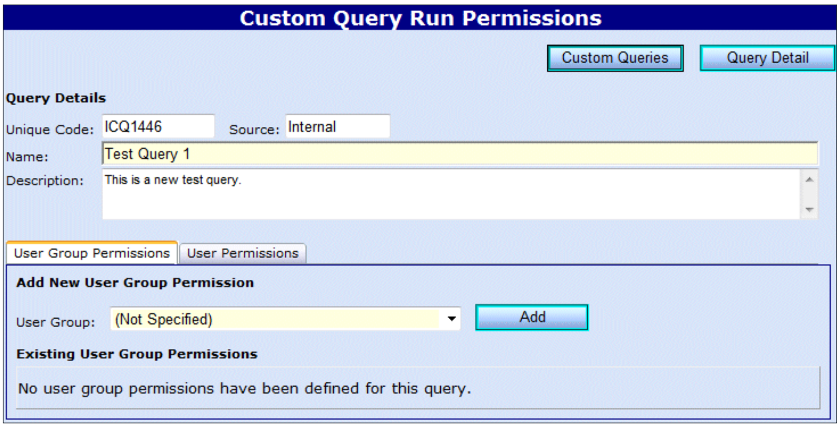


Figure 60 Query Run Permissions

1. Select the **User Group Permissions** or **User Permissions** tab as appropriate.
2. Select the names of the user groups or individual users from the drop-down lists. When selecting individual users, the drop-down list can be displayed in **Full Name** or **Username** order.
3. Click the **Add** button.

   The selected user groups and users are granted **Custom Query Run** permissions and are added to the lists on the appropriate tabs.

   In the following example, three individual users have been granted permissions to run custom queries:

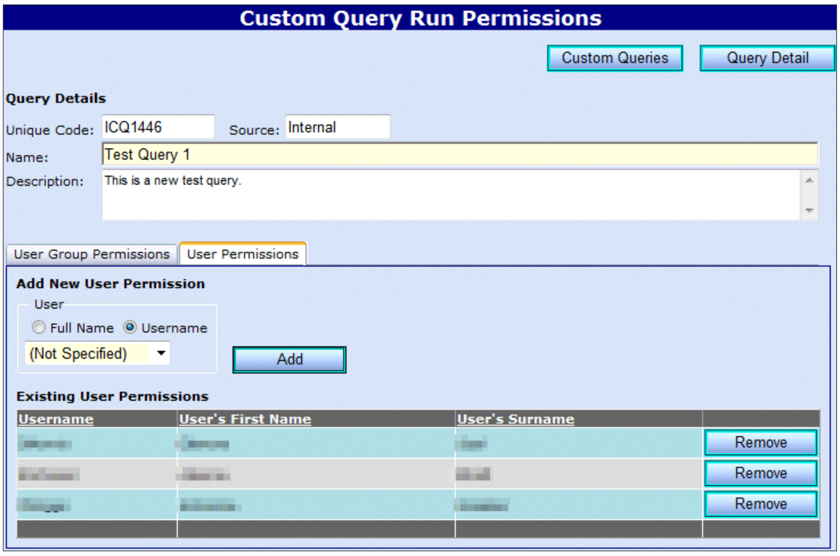


Figure 61 Query Run Permissions added

Click the Remove button to delete a user or group from the list and remove their **Custom Query Run** permissions.

Running Custom Queries

Custom Queries can be run via **Admin | Custom Query** by administrators, or by ordinary users with **Custom Query Run** permissions via **Reports | Custom Query**.

1. Carry out a custom query search to display the required query in the list.
2. Click the **Run** button.
   - If no parameters are available, the **Select Query Output** screen is displayed (go to step 4).
   - If parameters are available, the **Inputs** screen is displayed, enabling you to select the parameters before running the query.

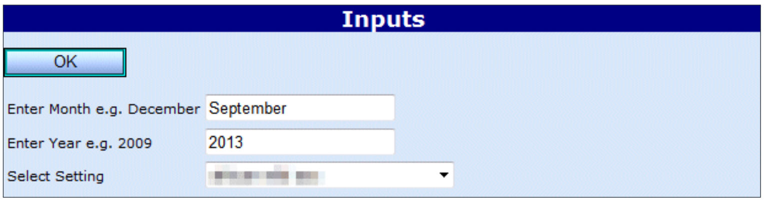


Figure 62 Running a custom query – Inputs screen

In the example in Figure 62, the query selected is **Babies Due in a Particular Month** and the input parameters are **Month** due, **Year** due and **Setting**.

3. Click the **OK** button.

When parameters have been selected, or if no parameters are available, the results are displayed on the **Select Query Output** screen.

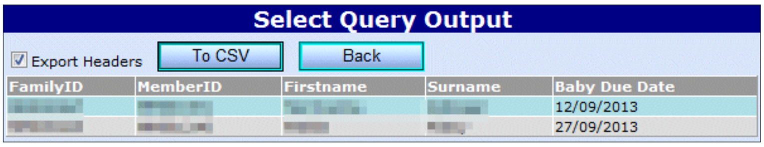


Figure 63 Running a custom query – Select Query Output screen

4. If required, deselect the **Export Headers** check-box to exclude headers from the .csv file.
5. Click the **To CSV** button.
6. Save the .csv file to a suitable location. The file can then be viewed in e.g. Microsoft Excel™.

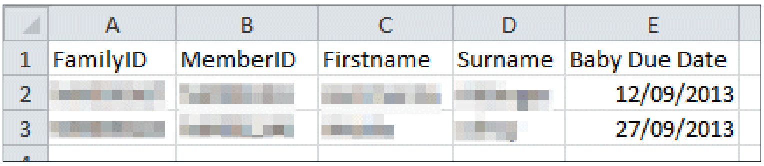


Figure 64 Running a custom query – output displayed in Microsoft Excel™.

Adding Custom Queries

Users with the appropriate permissions can add new **Select** queries for local use.

Select **Admin | Custom Query** and click the **Add** button to display the **Custom Query Management – New Query** screen.

> ***NOTE**: Only users with full access to the **Details** and **SQL Contents** permissions can add new custom queries. These queries cannot be exported to the repository.*

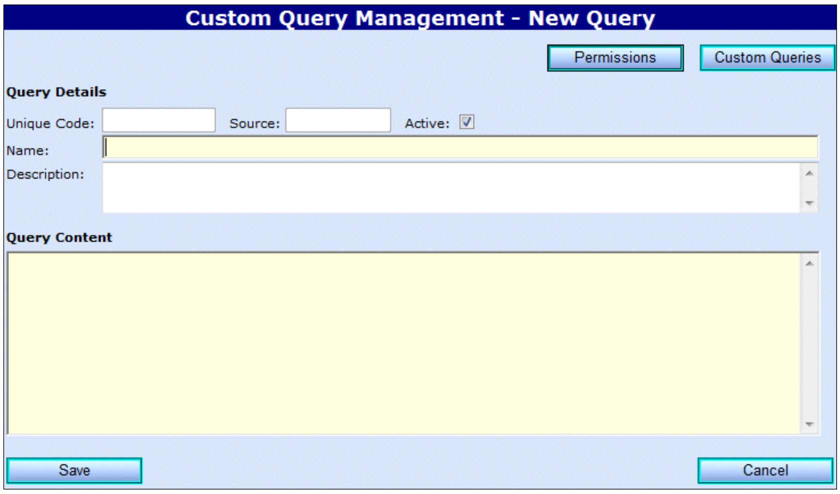


Figure 65 Adding a new custom query – Query Details

1. Enter the **Query Details**:
   - **Name** (mandatory).
   - **Description**.
   - **Query Content** (mandatory). This is an SQL statement.
2. Select or deselect the **Active** check box as appropriate (selected by default).
3. Click the **Save** button.

   A **Unique Code** is auto-generated for the query and the **Source** is added as **Internal**.

> ***NOTE**: eStart does not validate **Query Content** (SQL statement).*

4. Click the **Permissions** button to display the **Custom Query Run Permissions** screen. See Custom Query Run Permissions on page *38*.

Custom Query Repository

Clicking the **Repository** button on the **Custom Query Search** screen enables hosted customers with appropriate access permissions to display the Custom Query Repository. This is a searchable list of existing custom queries produced by Capita at the request of customers.

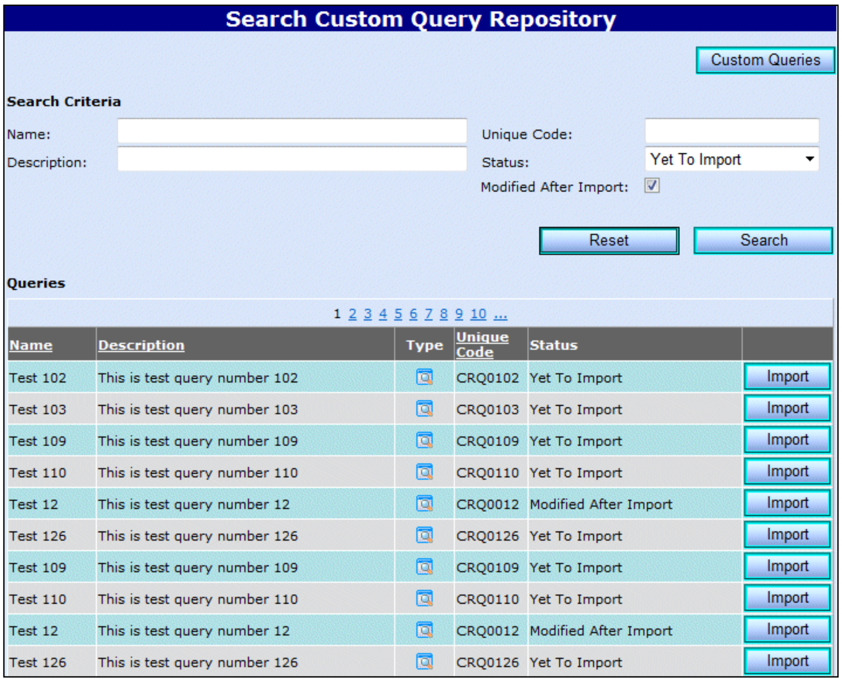


Figure 66 Custom Query Repository

Clicking the **Custom Queries** button displays the **Admin | Custom Query** screen.

This **Custom Query Repository** displays a searchable list of all custom queries in the repository that are available for import. These have either:

- Not yet been imported, or
- Have been imported but were subsequently modified in the repository by Capita One, and the modified versions have not yet been imported.

To import a custom query from the repository:

1. Enter search criteria.

   Enter the **Name**, **Description** or **Unique Code** and select the **Status** from the drop-down list. The **Status** options are:

   a. **Any**: All custom queries.

   b. **Imported**: Custom queries that have been previously imported. If these have subsequently been modified, they can be re-imported.

   c. **Yet to Import**: Custom queries that have not been previously imported.

2. Select the **Modified After Import** check box to search for custom queries that have been imported and have been subsequently modified, so can be re-imported.
3. Click the **Search** button.

   Clicking the **Reset** button clears the search criteria and enables a new search.

4. Click the **Import** button to bring a custom query into your eStart system..

> ***NOTE:*** *If a custom query has been modified in the repository and is then re-imported, only the* ***Query Details*** *are imported. The* ***Name*** *and* ***Description*** *are not imported, even if they have been changed.*

Permissions can now be assigned to the imported query (see Custom Query Run Permissions on page *38),* and the query can be edited if necessary.

07 | Monitoring eStart Use

Monitoring eStart Use

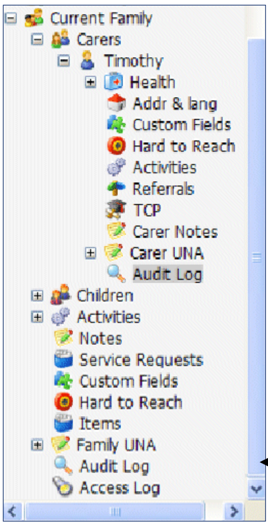
The **Access** and **Audit Logs** within eStart allow you to see who has viewed or made changes to a particular person or family record within a selected date range and also to see exactly which items within a record were changed.

Access to these screens is controlled by permissions. By default only console managers will have access, but they can give permission for other users to view them through the usual permissions routes.

> ***Note****: 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

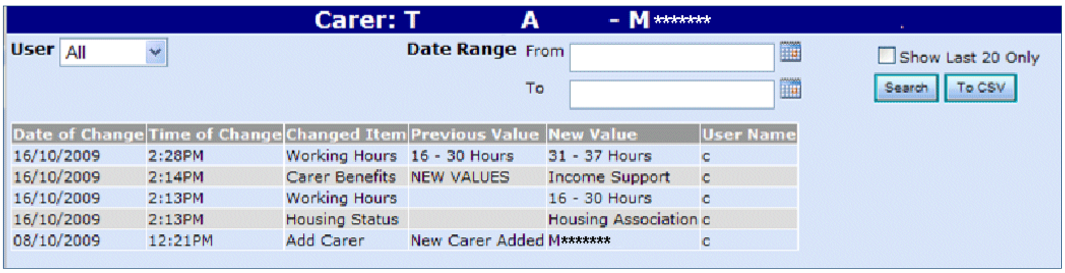
The **Audit Log** tracks all changes made to a record i.e. carer and child basic details, health data, custom fields, hard to reach, activities, referrals, and TCP attendance. For family records, it also logs changes made to activities, service requests, custom fields, hard to reach and items.



To view the **Audit Log** for a person (carer or child), follow the menu route **Current Family | <Name> | Audit Log**.

To view the **Audit Log** for a family, follow the menu route **Current Family | Audit Log**.

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



Date of Change	Time of Change	Changed Item	Previous Value	New Value	User Name
16/10/2009	2:28PM	Working Hours	16 - 30 Hours	31 - 37 Hours	c
16/10/2009	2:14PM	Carer Benefits	NEW VALUES	Income Support	c
16/10/2009	2:13PM	Working Hours		16 - 30 Hours	c
16/10/2009	2:13PM	Housing Status		Housing Association	c
08/10/2009	12:21PM	Add Carer	New Carer Added	M*******	c

Figure 67 Audit Log (Carer)

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

- The date and time of the change (based on your web server's date and time)
- The actual item (field) that was changed

- The previous value (if one existed)
- The new value
- 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 note below).

> ***Note**: only information that has been added or changed since the audit log functionality was implemented in eStart v3.37 is listed. No earlier information is included in the audit log.*
>
> *Following the implementation of eStart 3.46, the **Ethnicity**, **Sub-Ethnicity** and **Other Ethnicity** have been recorded as **Changed Items** 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, you 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 spread sheet. Make sure you give the file a suitably descriptive file name when you save it.

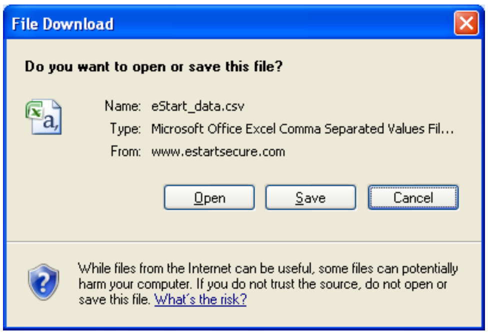


Figure 68 Export Audit Log to CSV

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

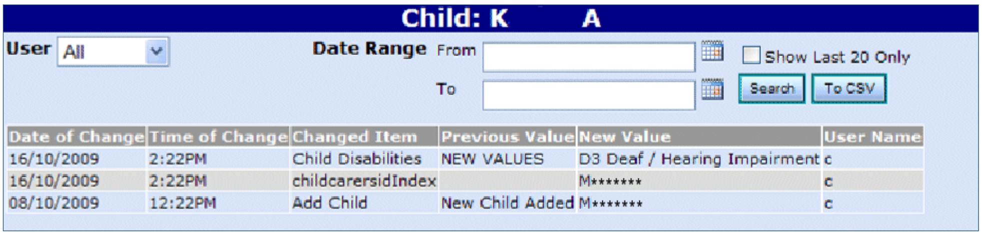


Figure 69 Audit Log (Child)

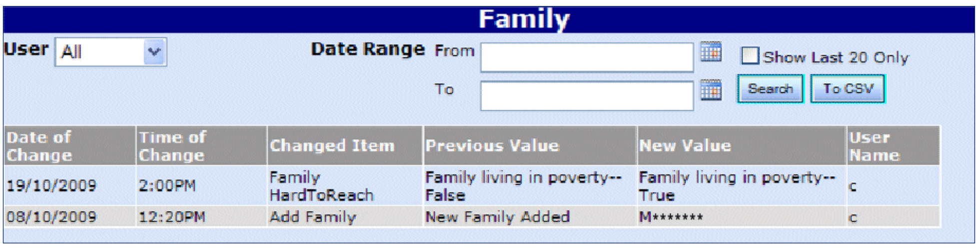
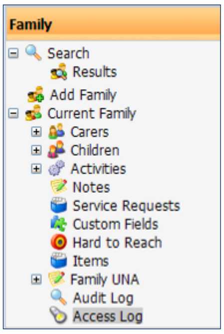


Figure 70 Audit Log (Family)

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, follow the menu route **Current Family | Access Log**.

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

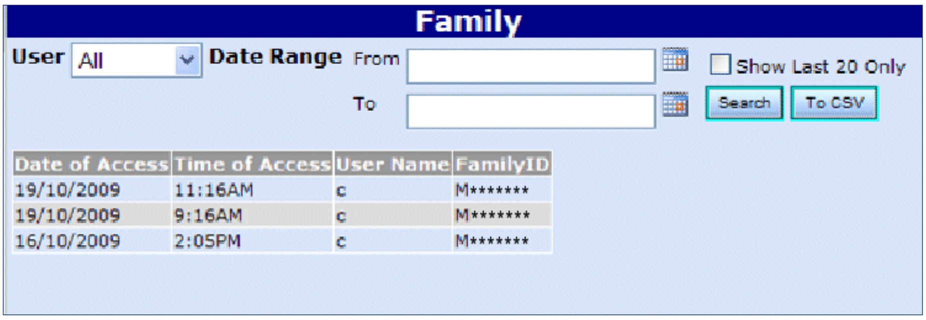


Figure 71 Access Log (Family)

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

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

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

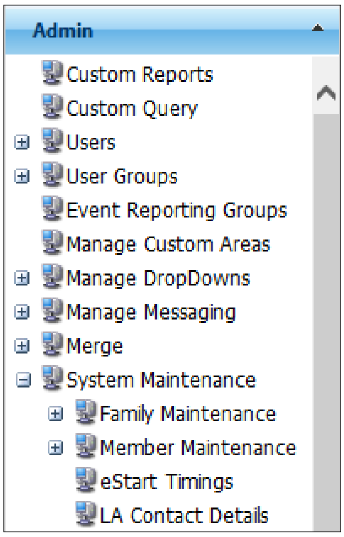
You can limit the results to list only those access attempts made within a certain date range and you can also choose to only show the last twenty records. If you choose or change either of these then you will need to click the **Search** button to create the list of results.

The **To CSV** button exports the list to Excel from where you can open it or save it. Make sure you give the file a suitably descriptive filename when you save it.

08 | System Maintenance

System Maintenance

System Maintenance enables you to rectify errors in data entry. The **System Maintenance** reports are similar to Custom Queries but they also enable you to update records without actually visiting the database record.



To access this area, follow the menu route **Admin** | **System Maintenance** | **Family Maintenance** or **Admin** | **System Maintenance** | **Member Maintenance**.

Figure 72 System Maintenance

Family Maintenance

The **Family Maintenance** area reports on the following:

- **No Children Selected Age**: Active families with no children under the selected age and no pregnant carers. This lists the numbers of families with no members. Status can be updated.
- **No Carers**: Active families with no carers. Status can be updated.
- **No Joined Date**: Active families with no joined date. Status and joined date can be updated.
- **No Setting**: Active families with no setting. Status and name of setting can be updated.
- **Not Registered**: Active families who are not registered. Status can be updated and the registration description check box can be selected or deselected to set it to true or false.
- **No GP**: Active families with no GP. Status and name of GP can be updated.
- **No Postcode**: Active families with no postcode. Status and postcode can be updated.
- **No Family Telephone Number**: Active families with no telephone number. Status can be updated and a telephone number can be added.
- **No Status**: Active families with no status.

Member Maintenance

The **Member Maintenance** area reports on the following:

- **No Date of Birth**: Active members with no recorded date of birth. Status can be updated and date of birth can be set.

- **No Member Joined Date**: Active members with no joined date. Status can be updated and joined date can be set.
- **No Status**: Active member with no status.
- **No Ethnicity**: Active members for whom an entry exists in the **Other Ethnic Info** field and who have a missing main ethnicity entry. Ethnicity can be updated here without the need to open the **Family** record.
- **Bulk Ethnicity**: Multiple ethnicities that share the same **Ethnicity Description** can be updated. The page initially displays the old sub-ethnicity and old main ethnicity. Once a new main ethnicity has been selected, the new sub-ethnicity dropdown becomes available.
- **Family Inactive and Member Active**: Identifies where a family is inactive, but there are still active members assigned to the family. The inactive reason can be updated. The member audit log and audit log report are updated when this tool has been used. It does not update a member that is already inactive - their inactive reason will remain. Multiple families can be updated at the same time
- Members Inactive and Family Active: Identifies where members are inactive and the family is active. Family status can be updated. Only one family at a time can be updated, as the inactive reason for each member may be different. The family audit log and audit log report are updated when this tool has been used.

Using System Maintenance

The editable options for each report vary depending on the report, but always enable you to resolve the data issues that are the subject of the report.

1. Access the required maintenance area via **Admin | System Maintenance | Family Maintenance** or **Admin | System Maintenance | Member Maintenance**. Select the required maintenance report. In this example, the **System Maintenance | Family Maintenance | No Settings** report has been selected.

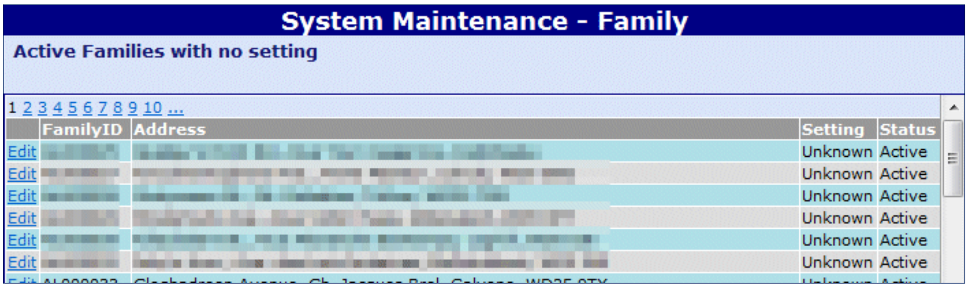


Figure 73 Example of Family Maintenance report

All the members who meet the report criteria are listed, and the **Family IDs** and **Addresses** of all the active families who do not have a setting recorded in eStart are displayed. For each of these the **Setting** is unknown and the **Status** is active.

2. Click the **Edit** hyperlink for the record you wish to change.

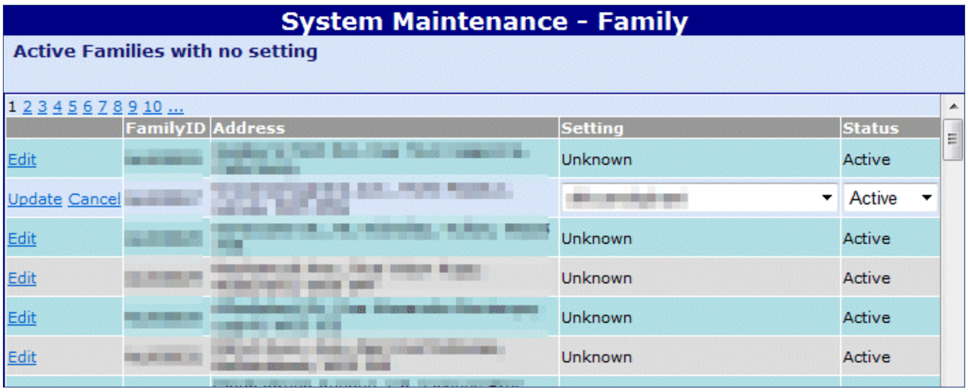


Figure 74 Carrying out Family Maintenance

3. Edit the **Setting** and **Status** as required.
4. Click the **Update** hyperlink. The family's record is updated and the entry is removed from the list.

eStart Timings

This is an option within **Admin | System Maintenance** that enables you to set the **Session Timeout** and **Password Expiry** periods. These settings make eStart more secure.

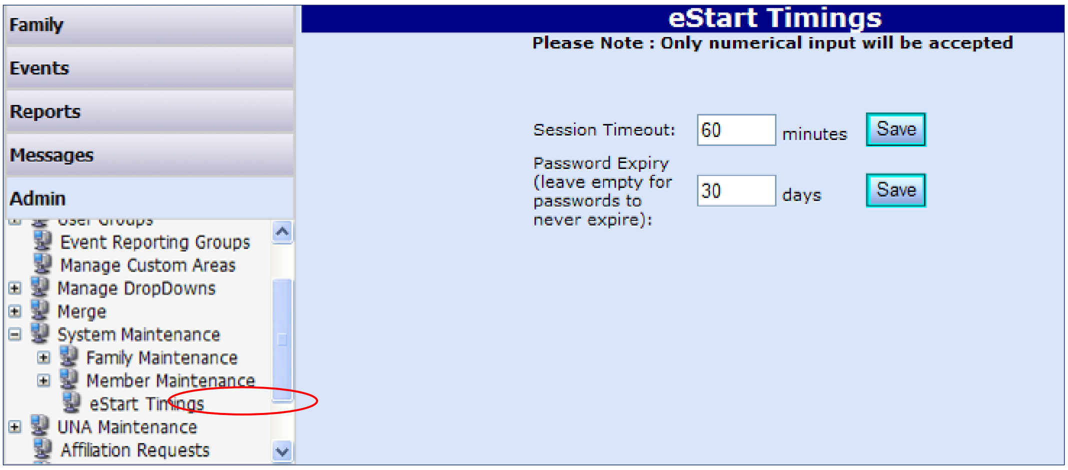


Figure 75 eStart Timings

The **Session Timeout** is the length of time of inactivity after which a user is automatically logged out and needs to log back in to eStart in order to continue working.

The **Password Expiry** period is the length of time after which users need to enter a new password. The default for this is 30 days and Capita recommends that this is not changed. A 30 day password expiry policy is the recommended industry standard and Capita suggests that you should adhere to this so that your system remains secure. You will need to check with your local IT Services department or provider for their recommendations and configure your eSuite system accordingly.

If you do not wish to enforce the password expiry option, you can leave the field empty and your users' passwords will never expire. <u>This is not recommended</u>.

LA Contact Details

This is an option within **Admin | System Maintenance** that enables you to set the **Email**, **Telephone No:** and **Website** address for your LA. This information is displayed to users at the bottom-left corner of the eStart login screen or when they select the **Contact Details** icon.

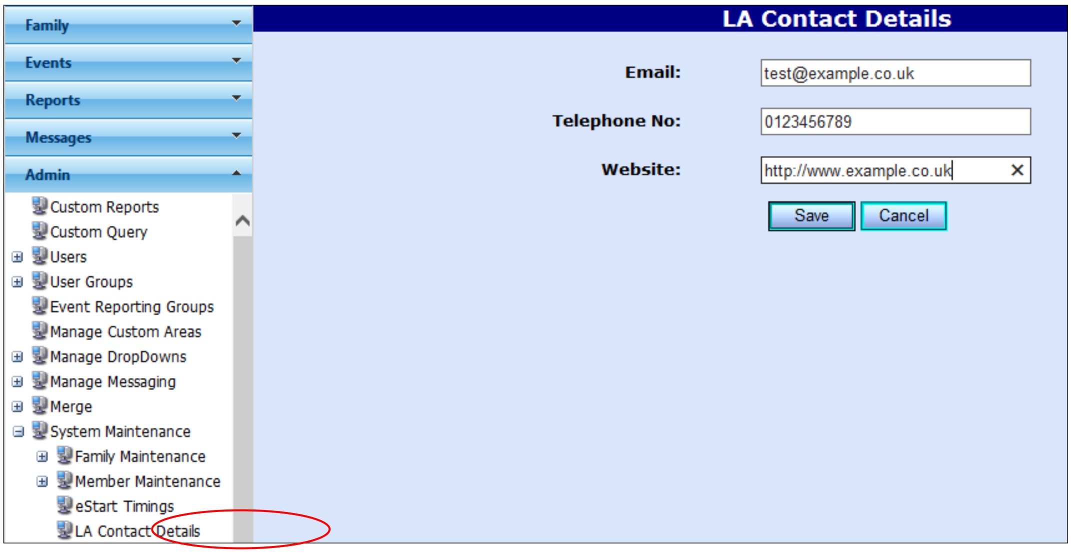


Figure 76 LA Contact Details

Affiliation Requests

If an eStart user does not have permission to edit or manage a family, they can make an **Affiliation Request**. Once the family has been affiliated to the user's nursery, they can then make the necessary changes. It is the console manager's responsibility to review and approve these requests.

For each request, the console manager can view the **Family ID**, **Address** and current **Family Setting**, along with the **Requested Setting** and the user name of the person who made the request.

Approving Affiliation Requests

To review and approve affiliation requests:

1. Select **Admin | Affiliation Requests** to display the **Affiliation Requests** page.

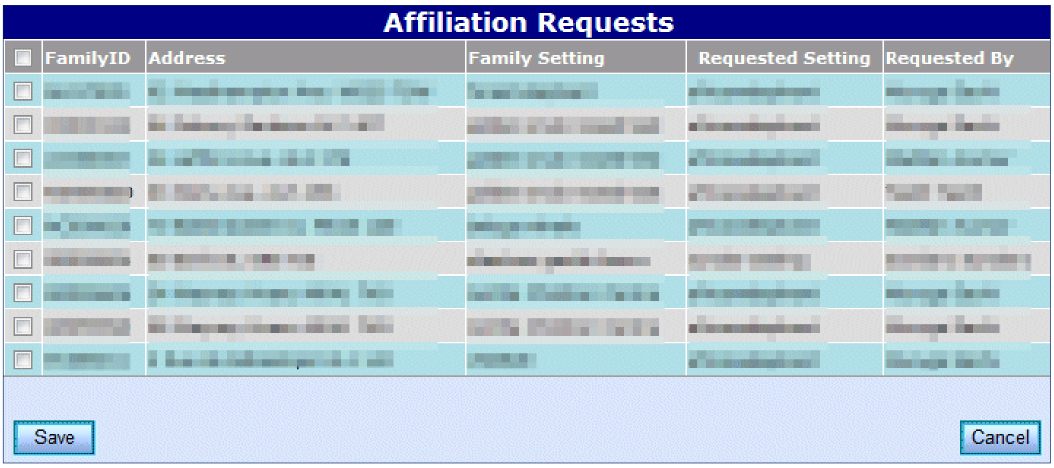


Figure 77 Admin | Affiliation Requests

2. Select the check box adjacent to the affiliation requests you wish to approve. To choose all the requests for approval, select the check box in the header adjacent to the **FamilyID** column heading.
3. Click the **Save** button. After an affiliation request has been approved, the user can edit the family. The user's own setting is now displayed in the family's **Affiliations** list.

Figure 78 Approved Affiliation on the Family screen

09 | LDQT Data Extract

LDQT Overview

The eStart Local Data Quality Tool (LDQT) extract functionality enables core data on the eStart database to be captured in an XML format. The XML file produced can then be passed to the DfE via the **Collect** functionality to allow all data to be checked for quality.

Key elements to note:

- Because of the size of the files involved, LDQT extracts must be scheduled to run overnight and the resulting files downloaded the next day.
- The data contained in the files produced by the LDQT extract should be considered sensitive and personal. Every precaution must be taken to only save LDQT extract files to safe locations. It is recommended that they be kept only as long as is necessary and are to be encrypted wherever possible.

Who can perform an LDQT extract?

Console managers and those who have been granted permissions to LDQT by a console manager can perform an LDQT extract. Console managers can grant permissions to other users to do this by first adding the permission to a group, and then adding the user to that group.

1. Follow the menu route **Admin | User Groups | Manage User Groups**.
2. From the **User Group** dropdown, select the group to which you wish to give access to the LDQT functionality and click the **Full Access** button for **LDQT Data Extract**.

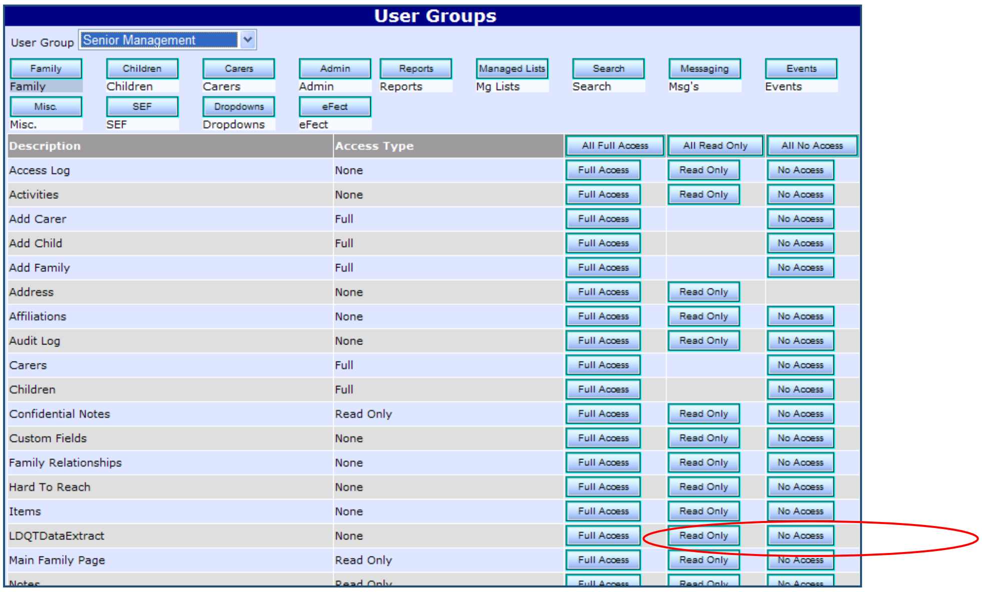
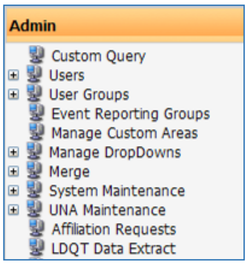


Figure 79 Granting LDQT Data Extract permissions to a user group

3. Once LDQT Data Extract permissions have been granted to a user group a console manager can add users to that group as described in eStart Users on *page 26*.

***Important Note**: LDQT extracts are of the entire database; granting an individual user membership of a group with **LDQT Data Extract** permissions for any setting does not restrict them to performing extracts for that setting only. Therefore, if **LDQT Data Extract** permissions are granted to a user group, any member of that group can perform an LDQT data extract of the entire database.*
For this reason, and considering the security and data sensitivity inherent to LDQT data, it is recommended that only console administrators and perhaps one or two senior managers should be granted access to the LDQT tool.

Scheduling an Extract



The LDQT tool is accessed via **Admin | LDQT Data Extract**.

The first time you select **LDQT Data Extract**, the screen below is displayed.

To schedule an extract, click the **Schedule Extract** button.

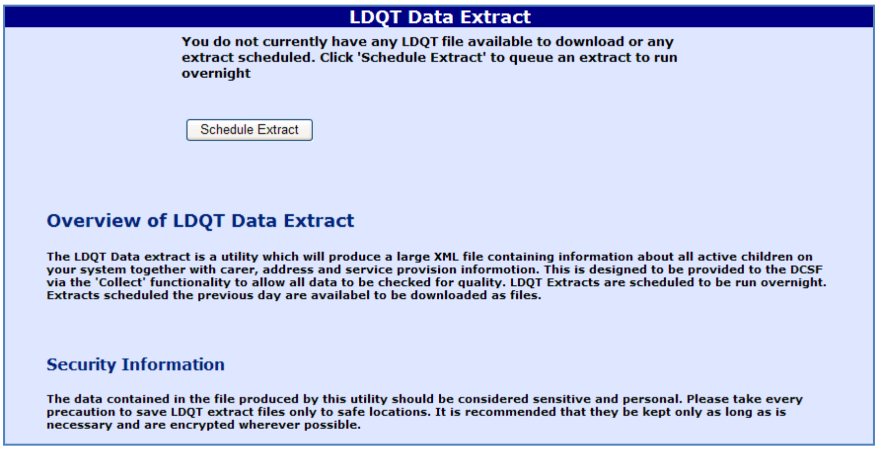


Figure 80 Scheduling an Extract

Once you have an extract scheduled the screen will inform you of this and present you with an option to cancel the extract should you wish. To cancel a scheduled extract simply click the **Cancel Schedule** button.

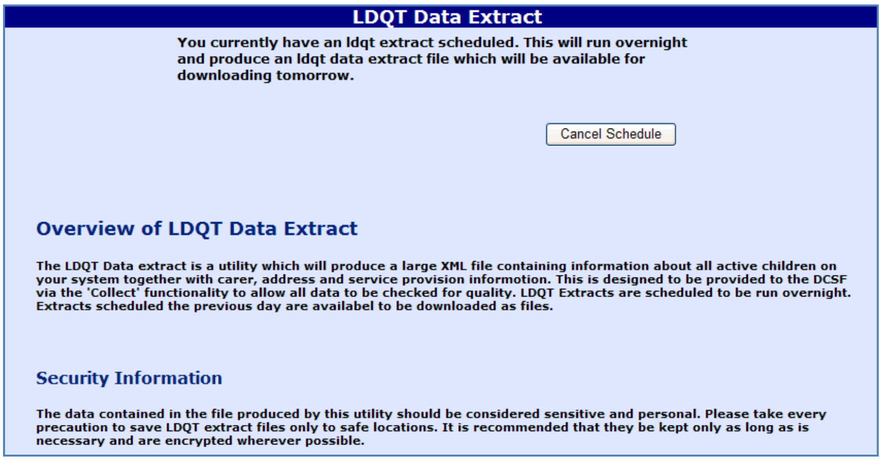


Figure 81 Deleting a scheduled extract

Downloading an Extract

Once you have an extract scheduled it will run overnight. The next morning you will be informed that there is an extract file waiting.

To receive the download:

1. Click the **Download LDQT File** button.

   If you do not wish to download the file, and wish to schedule another extract instead, click the **Cancel LDQT File** button. This disposes of the file and returns you to the first screen to enable you to schedule another extract.

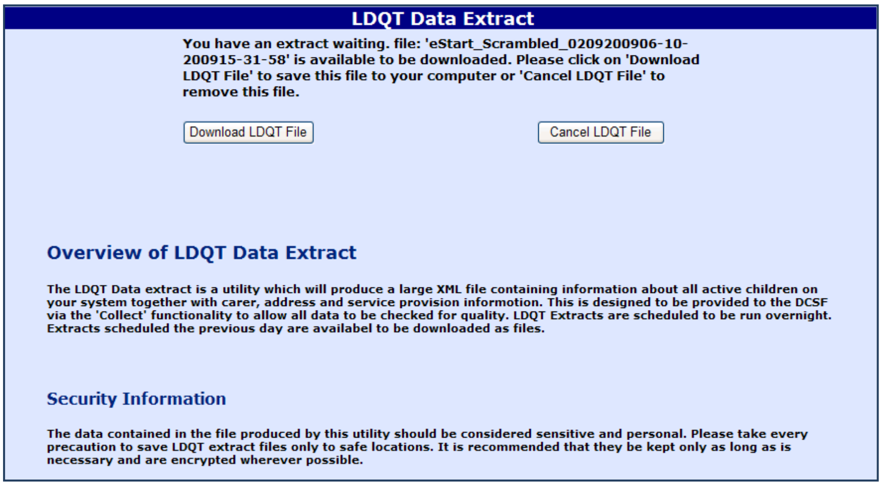


Figure 82 LDQT screen with extract ready for downloading

   When you click on the **Download LDQT File** button a file download dialog box is displayed ([Figure 83](#)) and the screen reverts to the first screen to enable you to schedule another download.

2. Click the **Save** button on the **File Download** dialog.

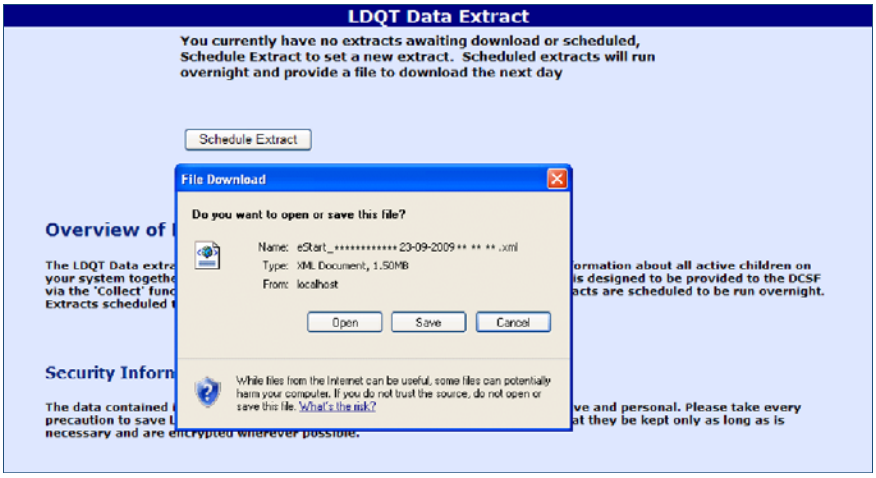


Figure 83 Downloading the file

> ***Note**: Do not click the **Open** button. This attempts to open the file in Internet Explorer, which, given the extremely large file sizes involved, takes a considerable length of time and memory resources, and may cause your computer to hang.*
> *If you click the **Cancel** button, the file will be lost and you will have to schedule another extract for the following day.*

A standard Windows **Save as** dialog is displayed.

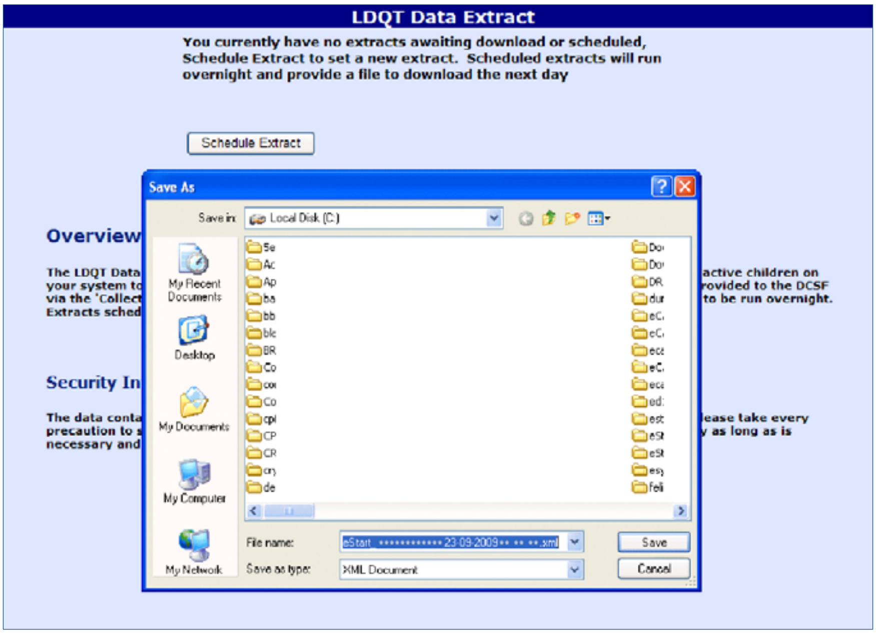


Figure 84 Saving the file

3. Select a location to save your file (the default location is the root of your computer's C: drive, this should be changed to a secure location on your network). The file default file name is a combination of your database name and the time that the extract was run and can be changed if required.
4. Click the **Save** button.

10 | Self Evaluation Forms (SEF)

SEF Builder Overview

Every centre should have its own assigned **Self Evaluation Form** (SEF). The **SEF Builder** enables you to create these questionnaires, each with the following components:

- Cover sheet
- Introduction
- Up to ten sections (A - J), containing questions. Each question has an answer type such as a text box, radio buttons or check boxes.

A SEF is based on a **SEF Template**, which is a pre-defined, reusable set of these components.

If a suitable template is not available, you must use **Manage Templates** to design a new template and then create a SEF based on this template. You can define as many different templates as you wish, and select a suitable one each time you add a SEF.

Answer Types

Text Boxes

Text Boxes enable a user to type in free-text qualitative answers. When a text box is added to the SEF, it can be dragged out by anchor points to any size you choose.

Radio Buttons

Radio Buttons are a list of possible answers to a question. They are mutually exclusive (the equivalent of a dropdown list), so the user can only choose one answer to the question.

Check Boxes

Check Boxes also give a list of possible answers to a question, but these are not mutually exclusive (the equivalent of a multi-select list), so the user can select more than one answer. Check boxes are added one at a time. For example, if you have a question such as:

Which of the following apply to your centre?

You can add a set of check boxes with values such as Friendly, Well run, Good service etc. The user can select one or more of these answers.

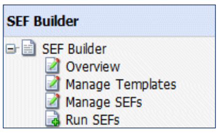
Data Elements

Data Elements are predefined questions with answers that are difficult to find out, e.g. Number of teenage parents?

SQL queries are written by the One support team to extract the answers from your database. If you need a new data element, contact the support team at one.support@capita-cs.co.uk, who will construct the element and add it to your eStart database.

Data Elements are selected from the **Data Element** dropdown. When a SEF that includes a data element is run, the answer is automatically inserted into the form.

Managing SEF Templates



Follow the menu route **SEF Builder | Manage Templates**.

Figure 85 SEF Builder Menu

The **SEF Template Management** screen enables you to search for an existing template that can be renamed, edited or deleted depending on your user permissions. You can also create new SEF templates.

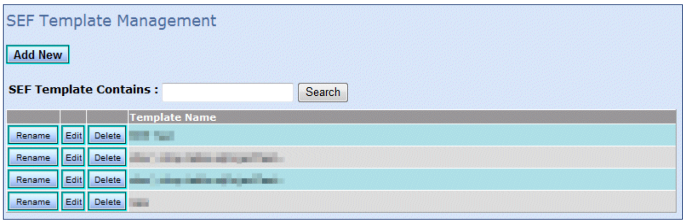


Figure 86 SEF Template Management screen

- Rename an existing template by clicking the **Rename** button.
- Update the layout and questions by clicking the **Edit** button.
- Click the **Delete** button to remove a template.

Creating a New SEF Template

1. Select **SEF Builder | Manage Templates** to display the **SEF Template Management** page.
2. Click the **Add New** button and enter the SEF Template Name.

Figure 87 SEF Template Name

3. Click the **Save** button to create the new empty template.
4. Click the **Edit** button to insert text, text boxes, radio buttons, check boxes or data elements.

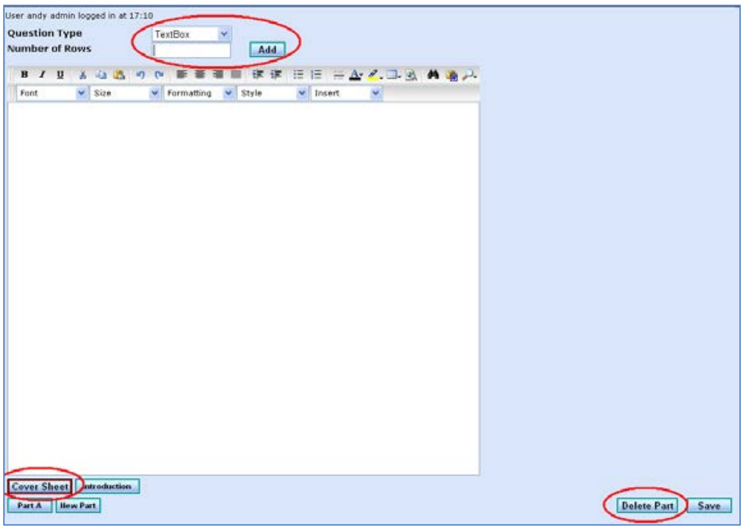


Figure 88 SEF Builder - Edit SEF screen

Type <#PageBreak#> to introduce a **page break** into the section. This causes a break onto a new page when the SEF is printed.

Click the **Cover Sheet**, **Introduction** or **Part A** buttons to edit the pages (see Figure 89 and Figure 90).

Editing the Cover Sheet

Click the **Cover Sheet** button. Enter suitable text for the SEF cover sheet and format it using the editing tools. Click the **Save** button.

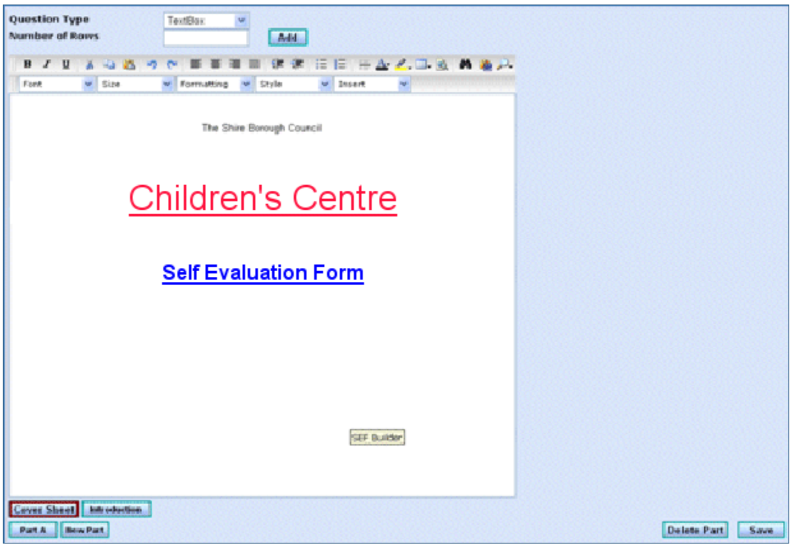


Figure 89 SEF Builder - Cover Sheet design screen

Editing the Introduction

Click the **Introduction** button. Add a brief introduction to your SEF by entering the text and formatting it appropriately. Click **Save**.

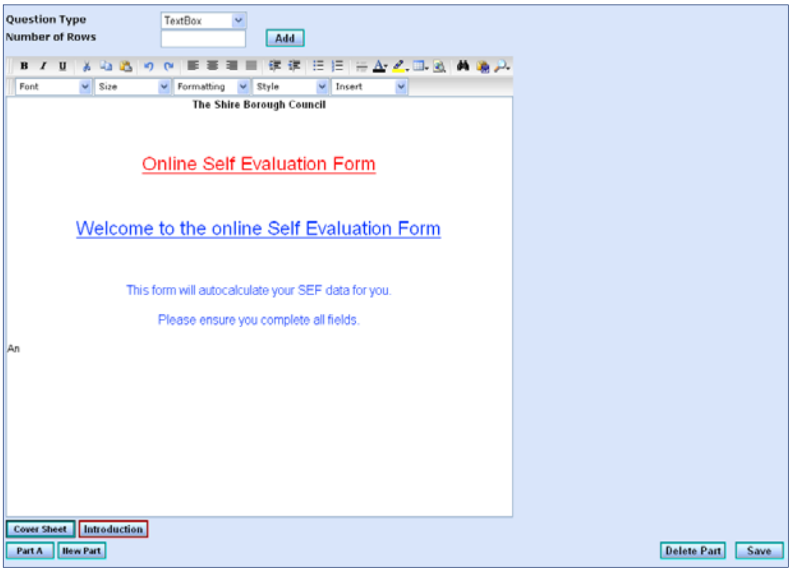


Figure 90 SEF Builder - Introduction screen

Editing Sections

To add the first section, click the **Part A** button. Use the buttons to switch between the **Cover Sheet**, **Introduction** and **Part A**.

When you have added the questions you require to Part A, click the **Save** button. Use the **New Part** button to add extra parts to the form.

Adding a question with a free text box

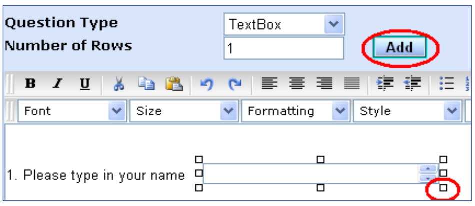


Figure 91 SEF Builder - Adding a question with a free text answer

1. Position the cursor where you would like your question to appear and type and format the text.
2. Add a few spaces after the text and select **TextBox** from the **Question Type** dropdown.
3. Click **Add**. A greyed out text box is displayed, which can be adjusted to the size you require.
4. Click the **Save** button.

Adding a question with radio buttons

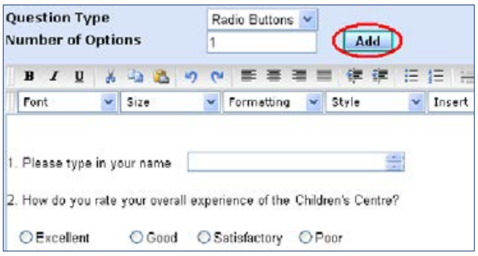


Figure 92 SEF Builder - Adding a question with radio buttons

1. Enter two carriage returns to move down the page.
2. Type and format the question, then enter another carriage return.
3. Choose **Radio Buttons** from the **Question Type** dropdown.
4. Enter the number of answer choices you require in the **Number of Options** box.
5. Click the **Add** button.
6. Repeat to add more radio buttons as required.
7. Replace the text **Option 1, 2, 3** etc. with your answers.
8. Click the **Save** button.

Adding a question with check boxes

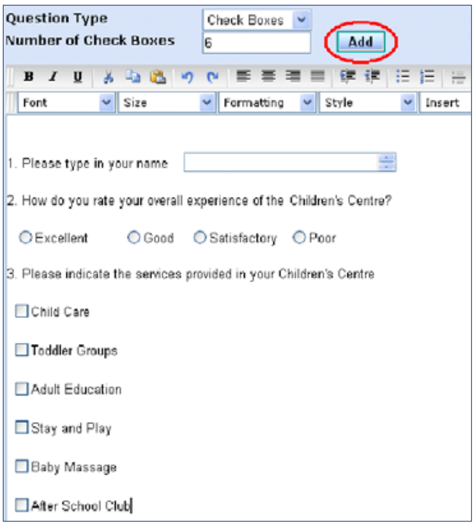


Figure 93 SEF Builder - Adding a question with check boxes

1. Enter two carriage returns to move down the page.
2. Type and format the question, then enter another carriage return.
3. Choose **Check Boxes** from the **Question Type** dropdown.
4. Enter the number of check boxes you require in the **Number of Options** box.
5. Click the **Add** button
6. Replace the text **Check Box 1, 2, 3** etc. with your answers.
7. Click the **Save** button.

Adding data elements

1. Enter two carriage returns to move down the page.
2. Format and type in the question, then enter a couple more carriage returns (use SHIFT + ENTER to move down one line or just ENTER to move down two lines).
3. Choose **Data Elements** from the **Question Type** dropdown.
4. Click the **Add** button.
5. Click the **Save** button.

Managing SEFs

To add a new SEF based on a template and make it available for users, follow the menu route **SEF Builder | Manage SEFs**.

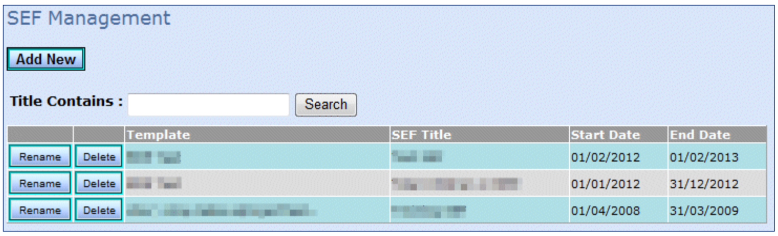


Figure 94 SEF Management

SEF Management enables you to make a new SEF available, or to rename or delete a SEF by clicking the appropriate button (this does not rename or delete the SEF template).

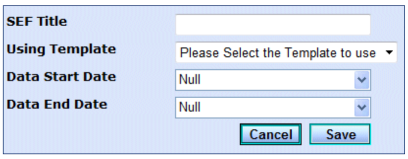


Figure 95 Rename a SEF

1. Enter a **SEF Title** and select a suitable template from the **Using Template** dropdown.
2. Enter the **Data Start Date** and **Data End Date** to be used by data elements in the SEF.
3. Click the **Save** button.

Running a SEF

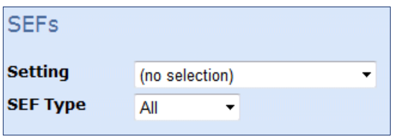


Figure 96 SEF Search

1. Follow the menu route **SEF Builder | Run SEFs** to display the SEF search.
2. Select your **Setting** and the **SEF Type**. A list of prepared SEFs is displayed.
3. Click the **Run SEF** button to run the SEF.

   For more information about running a SEF, please see the *eStart Web User Handbook*.

11 | Add on Modules

Add on Modules for eStart Web

There are currently several modules available for purchase within eStart Web:

- Electronic Registration
- Cost Effectiveness
- UNA

Electronic Registration

Several authorities have reduced the amount of time spent manually typing in registration forms by using a special pen called a **Digipen** which links to eStart, recognises handwriting and auto-uploads the registration form ready for processing.

Figure 97 Digipen

The pen recognises handwriting whilst the new registrant writes and the text “auto-transfers” to the server with all details recorded.

Figure 98 Forms transferred seamlessly

When your user has finished, the form appears in eStart Web under **Electronic Registration**.

Setting up the Digipen

The set-up steps are as follows:

1. Install drivers and cradle as per manufacturers’ recommendations
2. Register any new pens with Destiny via www.destinyplc.co.uk or call 08714 370077

Your user is now ready to start entering forms as described in the **eStart Web User Guide**.

Cost Effectiveness

The **ECM**[2] **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.

Setting up Access

To enable the module, the Console Manager needs to contact One Support. Once enabled the **Cost Effectiveness** section in the left-hand menu is active.

Administrators should ensure that Cost Effectiveness is listed under **Admin | User Groups | Manage User Groups | Misc**.

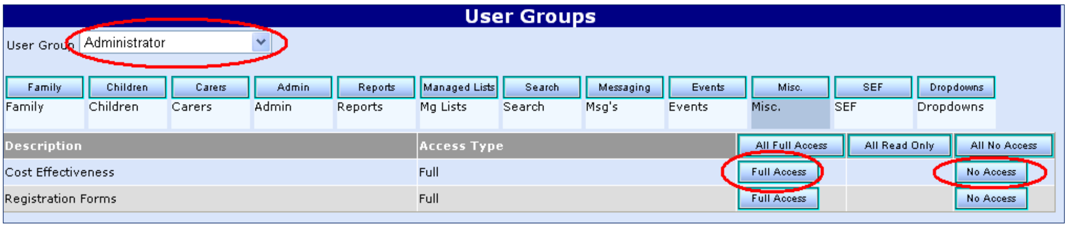


Figure 99 Setting up access to Cost Effectiveness

Check that access is configured. Log into eStart with a relevant user account, and click on **Cost Effectiveness** in the left hand menu. The following menu is displayed. Test the options available to ensure your users have access.

If **Cost Effectiveness** has been enabled, it is displayed as an enabled menu option.

Please see the **eStart Web User Guide** for more details on how to use this feature.

Figure 100 Cost Effectiveness menu

[2] ECM - Every Child Matters

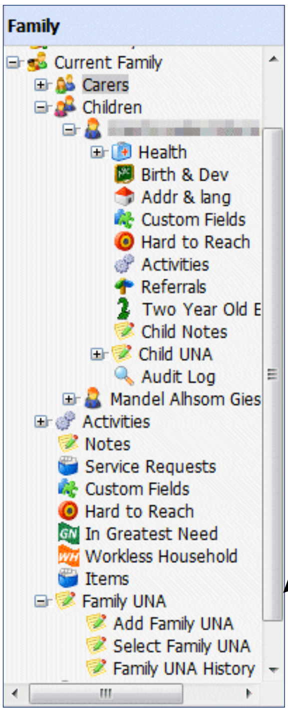
UNA – Universal Needs Assessment

A **Universal Needs Assessment** (UNA) enables health visitors to work with shared, centralised caseload information. It maps and tracks child and carer needs through an evidence-based tool that supports professional assessment.

A Universal Needs Assessment:

- Identifies intervention requirements and enables informed commissioning of services.
- Is a social capital tool to identify vulnerability and resilience and enable and helps identify hard-to-reach children and carers.
- Empowers community practitioners to be accountable and inform professional practice.
- Enables trend analysis of historic data to assist impact assessments on children and carers.
- Provides potential cost reductions to the local authorities and the NHS by informed targeting of preventative services.

The **Universal Needs Assessment** (UNA) is available for any family, carer or child in eStart.



To access the **Universal Needs Assessment** (UNA) for a carer, follow the menu route **Current Family | Carers | <carer’s name> Carer UNA**.

For a child follow the menu route **Current Family | Children | <child’s name> | Child UNA**.

For a family follow the menu route **Current Family | Family UNA**.

Figure 101 UNA Node

For information about how to use the UNA and detailed descriptions of the UNA reports, please see the *eStart Web User Handbook*.

Setting up Access

Please contact the One Service Desk for full details on how to enable this module.

UNA Maintenance

UNA Maintenance has two options, **Template Administration** and **Score Administration**.

- Select **Template Administration** to create new templates and modify existing templates.
- Select **Scores Administration** to change the score weightings for a specific template.

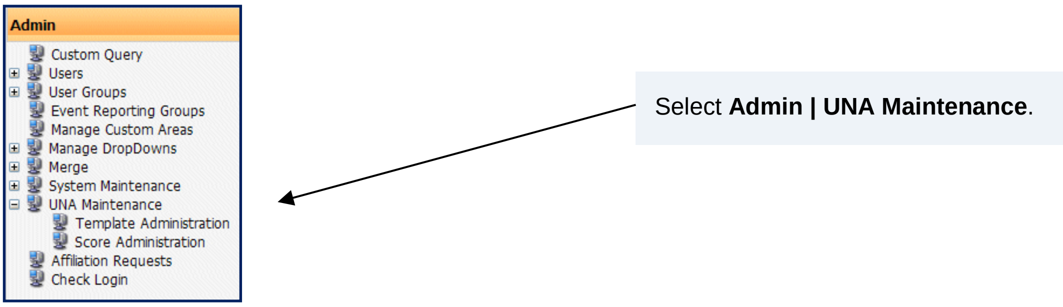
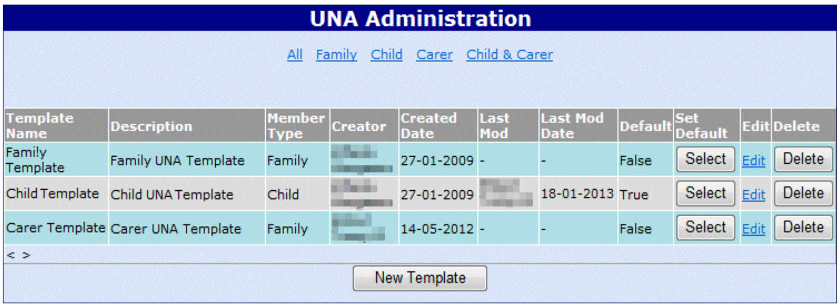


Figure 102 UNA Maintenance Menu

UNA Template Administration

Each template is part of the overall UNA and is included in the UNA as a set of tabs (sections) with an associated set of questions (nodes).

UNA Template Administration enables you to create, modify or delete a template or part of a template. This is available via **Admin | System Maintenance | UNA Maintenance | Template Administration**. The templates are then added to the overall UNA.



UNA Administration

All Family Child Carer Child & Carer

Template Name	Description	Member Type	Creator	Created Date	Last Mod	Last Mod Date	Default	Set Default	Edit	Delete
Family Template	Family UNA Template	Family		27-01-2009	-	-	False	Select	Edit	Delete
Child Template	Child UNA Template	Child		27-01-2009		18-01-2013	True	Select	Edit	Delete
Carer Template	Carer UNA Template	Family		14-05-2012	-	-	False	Select	Edit	Delete

< >

New Template

Figure 103 UNA Template Administration

To create a new template, you can either modify an existing template and save the modified template with a new name, or create a new template from scratch.

Editing a UNA Template

Editing an existing UNA template enables you to:

- Correct mistakes made in earlier versions of the template
- Add, remove or move sections (these are displayed as tabs in the UNA)
- Add, remove or move nodes (these are the questions in the UNA)
- Create a new template based on an existing template.

To modify an existing template:

1. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Template Administration**.
2. Click the **Edit** hyperlink for a template (see Figure 103 UNA Template Administration).

The **UNA Template Modification** page is displayed. The current template tree is displayed on the left-hand side of the page.

> ***Note**: The **UNA Template Modification** page may take some time to load.*

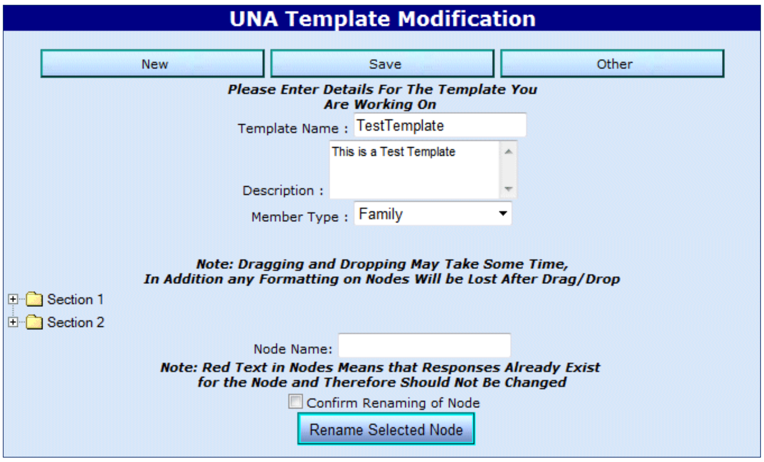


Figure 104 UNA Template - Modifying an Existing Template

3. Modify the template as required (see Adding a New Section on page *65* and the subsequent topics in this handbook).
4. Click the **Save** button
5. Click the **Save To New** or **Overwrite** button
   - **Save to New** creates a new template
   - **Overwrite** saves the changes to the current template.

   See Saving a UNA Template on page *69*.

> ***Note**: If you click the **Save** button but do not then click the **Save to New** or **Overwrite** button, the changes will not be saved.*

Adding a New Section to a UNA Template

To create a new section in the template:

1. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Template Administration | UNA Template Modification**.
2. Click the **New** button.
3. Click the **New Section** button.

   A new top level section is added to the template.

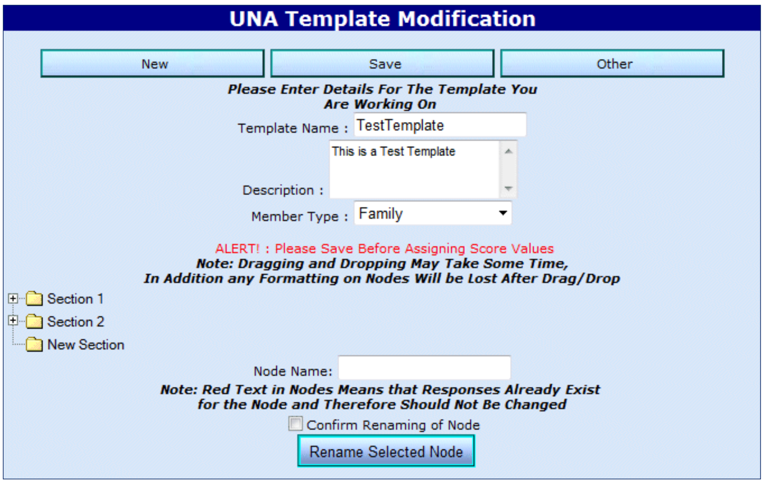


Figure 105 New Section added

4. If required, rename the new section and add nodes.
5. Click the **Save** button.
6. Click the **Save To New** or **Overwrite** button as appropriate.

Adding a New Node to a UNA Template

When adding a node to a UNA template, each node must have a parent node or section. To add a new node to a section or node:

1. Click the section or node to which you wish to add the new node.
2. Click the **New** button.
3. Click the **New Node** button.

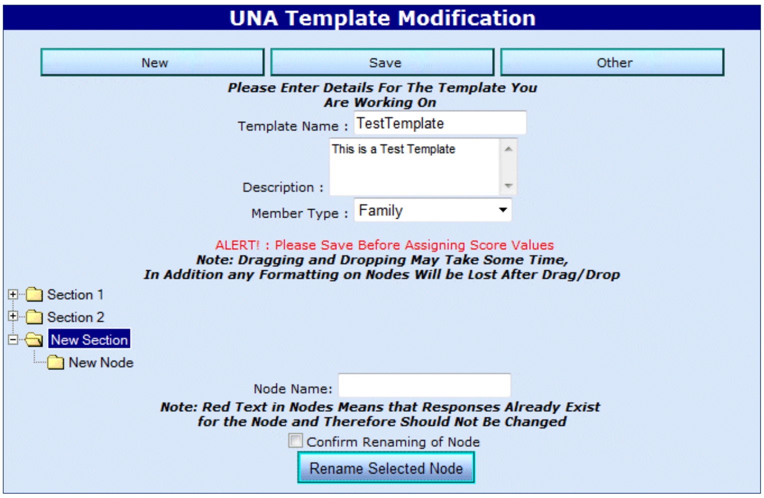


Figure 106 New Section and Node Added

4. If required, rename the new node and add child nodes.
5. Click the **Save** button.
6. Click the **Save To New** or **Overwrite** button as appropriate.

You can now assign score values to the new node. For more information see Assigning Score Values on page *71*

Renaming a UNA Template Node

All newly added sections and nodes are given placeholder names (**New Section** and **New Node**), so should be renamed before use.

1. Select the node you wish to rename.
2. Type the new name in the **Node Name** field.
3. Select the **Confirm Renaming of Node** check box.
4. Click the **Rename Selected Node** button.

   The page reloads with the new name applied.
5. Click the **Save** button.
6. Click the **Save To New** or **Overwrite** button as appropriate.

Deleting a UNA Template Node

Sections and nodes can be deleted if they do not yet have any answers (indicated by red text) below them in the hierarchy.

When a section or node is deleted, all the child nodes below it in the template tree are also deleted.

1. Select the section or node.
2. Click the **Other** button.
3. Click the **Delete** button.

   The page reloads with the changes applied.
4. Click the **Save** button.
5. Click the **Save To New** or **Overwrite** button as appropriate.

   If the section or node is not deleted, open the template tree to see if any of the nodes below it are coloured red, indicating that they have been answered. If so, they cannot be deleted. Instead, you need to copy the template and edit the copy.

   To do this:

1. Click the **Save** button.
2. Click the **Save To New** button.
3. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Template Administration** and open the copy (this will be at the end of the list of templates).
4. Enter a new **Name** and **Description** for the copied template.
    1. Follow steps 1-5, above.

Moving UNA Template Nodes

To move a child node to another location:

1. Expand the tree view.
2. Click and hold the node you wish to move.
3. Keeping the mouse button held down, drag the node to its new parent node or section.
4. When the new parent node or section is highlighted, release the mouse button.

   The page reloads with the changes applied.

5. Click the **Save** button.
6. Click the **Save To New** or **Overwrite** button as appropriate.

   A node cannot be moved to the top level. If you need to do this, you must first convert it to a section so that it is displayed as a tab in the UNA. See the next topic, Converting a UNA Template Node to a Section.

> ***Important Note****: If you move a node that has already been answered (so is coloured red), or a section that has nodes within it that have been answered, the answers may be lost.*

Converting a UNA Template Node to a Section

If you wish to move a node to the top level of a UNA, it must first be converted to a section.

1. Select the node.
2. Click the **Other** button.
3. Click the **Turn Into Section** button to reload the page with the node moved to the top level.
4. Click the **Save** button.
5. Click the **Save To New** or **Overwrite** button as appropriate.

> ***Note****: If you move a node that has been made exclusive, the exclusive setting is lost.*

It is not possible to convert a node that already has answers. Instead, you need to copy the template, and can then edit the copy.

To do this:

1. Click the **Save** button
2. Click the **Save To New** button.
3. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Template Administration** and open the copy (this will be at the end of the list of templates).
4. Enter a new name and description for the copied template
5. Follow steps 1-5, above.

Making UNA Template Questions Exclusive

The **Make Exclusive** setting should be used when it is appropriate to have only a single answer to a question. When this is selected, the answers (child nodes) are mutually exclusive (equivalent to a dropdown list or radio buttons), so only one answer to the question can be chosen.

A section cannot be made exclusive if:

- The section's nodes contain second level (child) nodes, or
- Any of the questions in the section have already been answered, so the node labels are red.

To make nodes mutually exclusive:

1. Select the node
2. Click the **Other** button
3. Click the **Make Exclusive** button.

The name of the node is made bold and italic.

Saving a UNA Template

Saving a UNA template is a two stage process.

1. Click the **Save** button
2. Click the **Save To New** or **Overwrite** button

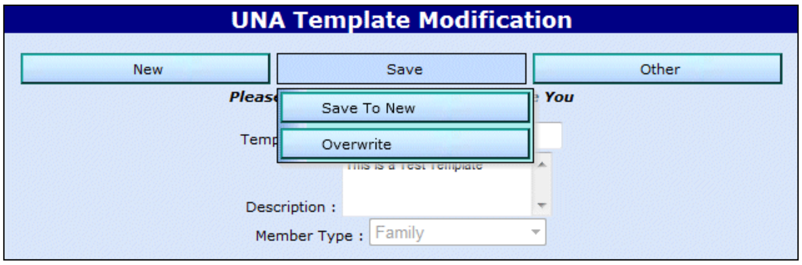


Figure 107 Saving a UNA Template

Save to New

When the **Save To New** button is clicked (either after editing an existing template or creating a new one), the **Template Name**, **Description**, **Member Type** and all the nodes and sections are copied to a new template. Answers to questions are not copied, so the new template does not contain any red nodes.

The new template is added to the end of list in **Template Administration**. It is initially given the same name as the template it has been copied from, so it is important to edit the new template's name and description to avoid confusion.

Overwrite

When the **Overwrite** button is clicked, the template you are editing is replaced with the modified template.

This removes any occurrence of the old template from eStart and replaces it with the new version. If any of the sections, nodes or node settings are different from those in the original template, new versions are created and are available immediately wherever the template has been used.

Creating a UNA Template from Scratch

1. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Template Administration**.
2. Click the **New Template** button to display an empty **UNA Template Modification** page.

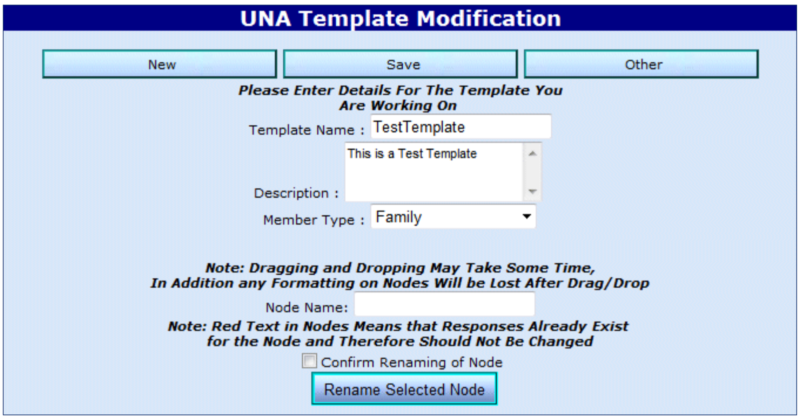


Figure 108 Creating a new UNA Template

3. Set up the template to meet your requirements. For more information, see Editing a UNA Template on page *64*.

***Note**: Score values cannot be assigned until you have saved the new template.*

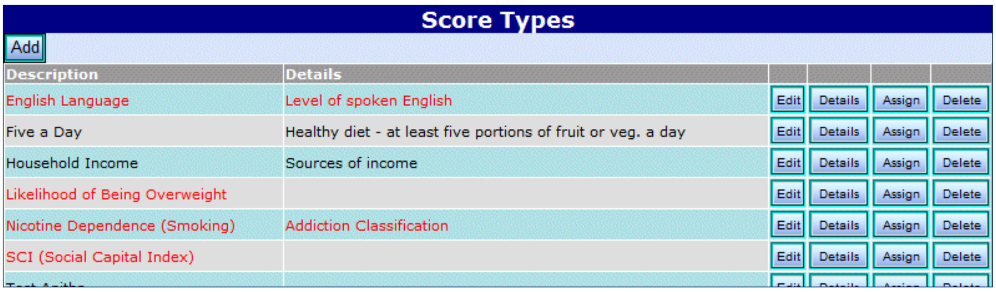
UNA Score Administration

The UNA questionnaire enables users to score members on certain criteria. Based on these scores, care workers can gauge risks to the members and any dependants under their care. If a particular answer implies a risk, then the value (score) of that particular node can be increased proportionately.

For example, if a carer smokes then this can be recorded in their UNA. Heavy smokers can be given a higher score and a tally can be kept of all questions linked to smoking.

Each template can have its own unique set of scores.

The **Score Types** page is accessed via **Admin | System Maintenance | UNA Maintenance | Score Administration**.



Score Types

Add

Description	Details				
English Language	Level of spoken English	Edit	Details	Assign	Delete
Five a Day	Healthy diet - at least five portions of fruit or veg. a day	Edit	Details	Assign	Delete
Household Income	Sources of income	Edit	Details	Assign	Delete
Likelihood of Being Overweight		Edit	Details	Assign	Delete
Nicotine Dependence (Smoking)	Addiction Classification	Edit	Details	Assign	Delete
SCI (Social Capital Index)		Edit	Details	Assign	Delete

Figure 109 UNA Score Administration page

This page enables you to:

- **Add** new score types
- **Edit** existing score types
- Add **Details** to a score type (including score limits and classifications)
- **Assign** or edit score values
- **Delete** a score type.

Adding or Editing UNA Score Types

Score types can be added via **Score Administration** or **Template Administration**.

- Adding a score type via **Score Administration** enables you to add a new score type or edit an existing score type.
- Adding a score type via **Template Administration** enables you to only add a new score type.

Adding Scores via Score Administration

1. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Score Administration** to display the **Score Types** page.
2. On the **Score Types** page, click the **Add** or **Edit** button
3. Enter a **Description** (the name of the score type)
4. Enter the **Details** (used when adding upper and lower score limits)
5. Click the **Save** button

Adding Scores via Template Administration

This method only enables you to add a new score type.

1. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Template Administration**.
2. Click the **Edit** hyperlink for your template (see Figure 103 UNA Template Administration).
3. The **UNA Template Modification** page is displayed. The current template tree is displayed on the left-hand side of the page.
4. Click the **Other** button
5. Click the **Assign Score Values** button

   The **UNA Score Assignment** page is displayed.

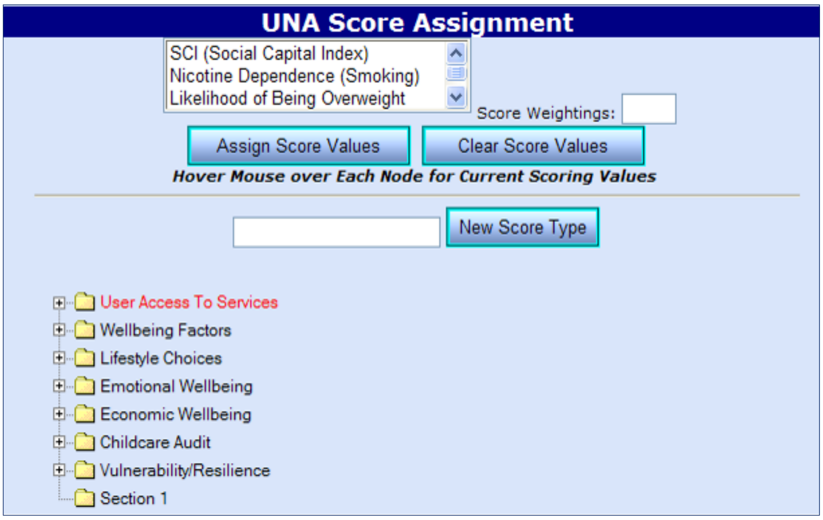


Figure 110 UNA Score Assignment

6. Type the name of the new score type into the field
7. Click the **New Score Type** button.

   The new score type is added to the dropdown list at the top of the page.

   You can now add score type details by editing the new score type as described in **Adding a Score Type via Score Administration**, above.

> ***Note***: *Score types in red should be edited with care because this indicates that questions using the score type have already been answered.*

Assigning Score Values

Score values are the weightings that are applied to score types when a UNA is completed.

There are two ways of assigning score values to a score type node or to edit previously assigned scores, either via **Score Administration** or **Template Administration**.

Assigning Score Values via Score Administration

1. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Score Administration** to display the list of score types
2. Click the **Assign** button for the score type
3. Click the tab for the score type.

   Items that don't yet have a score assigned have a green cross against them.

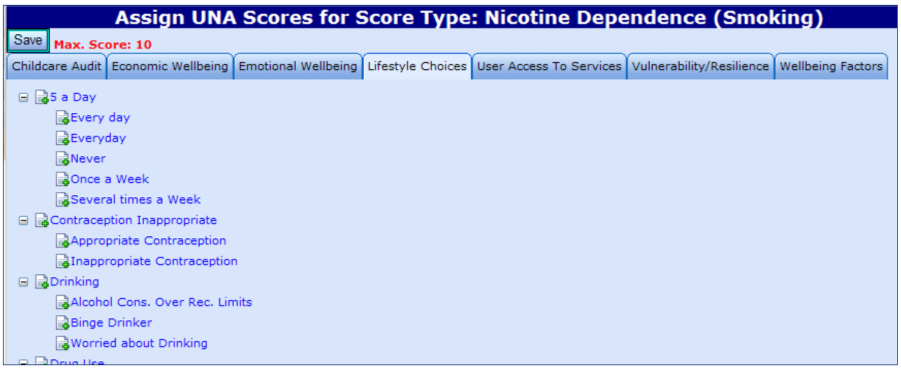


Figure 111 Assign UNA Scores

4. Click an item with a green cross to add a score value, or click an item without a green cross to edit a previously assigned value.
5. Click the **Save** button.

Assigning Score Values via Template Administration

1. Follow the menu route **Admin | System Maintenance | UNA Maintenance | Template Administration**.
2. Click the **Edit** hyperlink for your template (see Figure 103 UNA Template Administration).

   The **UNA Template Modification** page is displayed. The current template tree is displayed on the left-hand side of the page.
3. Click the **Other** button
4. Click the **Assign Score Values** button to display the **UNA Score Assignment** page (see Figure 110 UNA Score Assignment)
5. Select the appropriate score type from the dropdown list.
6. Enter the score value in the **Score Weightings** field.
7. Click the node that you wish to have that score type
8. Click the **Assign Score Values** button.

   If the node already has a score type, adding a new one leaves the data in the eStart database in case it is ever needed again.

Removing Score Values

To remove the score weighting from a node,

1. Follow steps 1-4 in **Assigning Score Values via Template Administration**.
2. Select the appropriate node
3. Click the **Clear Score Values** button.

   This removes the association between the current template and the selected node.

12 | Appendix: Dropdowns and their location within eStart

eStart Dropdowns

eStart Dropdown	Where to Find and Use
Care Workers	
Care Worker Groups	Care Workers | Edit | Personal | Group
Care Workers	Family | Carer | Referrals (Lead Professional) Family | Notes Events | Event Attendees
Health Visitors	Family | Current Family Details Family | Carer | Referrals (Lead Professional) Family | Notes Family | UNA Events | Event Attendees *Can either be added here, or an existing care worker can be defined as a Health Visitor via the **Manage Dropdowns | Care Workers | Edit | Personal Tab | Health Visitor** check box.*
Qualification Types	Care Workers | Edit | Qualifications | Qualification Type
Training Types	Care Workers | Edit | Training | Edit | Training Type
Carer	
Benefits	Carer Details
Carer Descriptions	Carer Details | Relationship to Child
Employment Descriptions	Carer Details | Employment
Housing Status	Carer Details
Marital Status	Carer Details
Title Descriptions	Carer Details | Title
Working Hours	Carer Details
Child	
Birth Delivery Locations	Child | Birth & Dev | Location
Childcare Provider	Child | Two Year Old Entitlement | Update Childcare Provider
CPP Descriptions	Child Details | CPP History | Reason
School Descriptions	Child Details | School
Two Year Old Entitlement Reasons	Child | Two Year Old Entitlement | Update Reason/Type
Cost Effectiveness	
Resource Types	Cost Effectiveness | Costs
Custom Labels	
Custom Labels	Custom Fields (Carer / Child / Family)
Demographics	
Nationality Descriptions	[N/A]
Religion Descriptions	Carer / Child Details | Religion
Development Plans	
Development Plans	Child | Birth & Dev
Failed Late Reasons	Child | Birth & Dev | Milestones

eStart Dropdown	Where to Find and Use
Events	
Access Groups	Event Details (Events | Add Event Type | Access Groups)
Aims	Event Details (Events | Add Event Type | Aims check boxes)
Categories	Event Reporting Groups
Frequency Descriptions	Event Details (Events | Add Event Type | Frequency)
Group Descriptions	Event Details (Events | Add Event Type | Group)
Locations	Event Details (Events | Add Event Type | Location)
Outcome	View Event Types | (specific past event) | Outcome Summary
Outcome Types	Event Details (Events | Add Event Type | Outcome Type dropdown)
Providers	Event Details (Events | Add Event Type | Update Providers)
Targeted Events	Event Details (Events | Add Event Type | Update Target Evidence Based Event)
TCP Accreditors	View Event Types | Add Course | Accreditors & Qualifications (Only available if the **TCP** check box is selected on **Add New Event Type** and **Course Accredited?** = **Yes** on the **Add Course** page)
TCP Qualifications	View Event Types | Add Course | Accreditors & Qualifications (Only available if the **TCP** check box is selected on **Add New Event Type** and **Course Accredited?** = **Yes** on the **Add Course** page)
Themes	Event Details (Events | Add Event Type | Theme)
Family	
Accommodation	Used in eNurseries only
In Greatest Need Reason	Family | In Greatest Need | Update Greatest Need Reason
Non Registration Reasons	Adding a New Family
Workless Household Reasons	Family | Workless Household History | Update Workless Household Reason
Health	
Alcohol Level	Carer / Child | Health | History
Disabilities	Person Details
GPs	Family | Family Details
Items	Family | Items
Item Types	Family | Items
Physical Activity Levels	Carer or Child | Health | History | Activity Level
Pregnancy History Descriptions	(Female) Carer | Health | Pregnancy | Pregnancy Ended
Smoking Change Reason	Carer Details | Smoking History
Smoking Descriptions	Carer Details | Smoking History
Special Needs	Person Details
Health Visitor	
Activity Groups	[N/A]
Closure Categories	[N/A]
Item Descriptions	
Item Descriptions	Family | Items
Language	
English Level Descriptions	Family | Carer/Child | Address and Languages | English
Language Descriptions	Family | Carer/Child | Address and Languages

eStart Dropdown	Where to Find and Use
Member	
Circumstances Descriptions	[N/A]
Country Of Birth	Family | Carer/Child Details
Inactive Descriptions	Family | Carer/Child Details | Status System Maintenance | Member Maintenance | No Date of Birth System Maintenance | Member Maintenance | No Member Joined Date
Name Change Reasons	Family | Carer/Child Details | Name History
Postcodes / Settings	
Postcode Areas	Admin | Manage Dropdowns | Postcodes/Settings | Postcodes Reports *(wherever "Living at" is part of a report)*
Postcodes	Wherever an address is entered or searched for.
Settings	Children's Centre Names and Calendar Colours
Super Output Areas	Admin | Manage Dropdowns | Postcodes/Settings | Postcodes Reports *(whenever **Living at** is part of a report)*
Referrals	
Actions (Referrals)	Referral and Case Management screen | Actions Taken
Consent Descriptions	Referral and Case Management screen | Consent
Reasons (Referrals)	Referral and Case Management screen | Reason
Refer To Descriptions	Referral and Case Management screen | Appointment With
Satisfaction Ratings	
Satisfaction Ratings	View Event Types | Satisfaction
Service Requests	
Actions (SR)	Family | Service Request | Assessment | Plan (if an Assessment has been added)
Needs	Family | Service Request | Assessment
Reasons (SR)	Family | Service Request
eStart Users	
Agencies	Manage Users | User Account Details
Service Types	Manage Users | User Account Details
Agencies	Manage Users | User Account Details
Warning Descriptions	
Warning Descriptions	Current Family | Carer / Child | Warnings

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