



One IYSS

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End User Guide

CAPITA

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Contents

01 / Before you start basics.....	1
Logging In	1
Logging Out.....	1
System time out	1
Navigating in OneIYSS	2
Clicking links and buttons	2
Saving data	2
Browser Back Button and Page Expired message:.....	2
Breadcrumb trail.....	3
Unlocking Records.....	3
02 / About My Homepage.....	5
My Homepage.....	5
Client/General View	5
Provider/Opportunity View	7
Admin/Manager View.....	7
03 / Client Searches	8
Searching for and viewing a single client record	8
Searching for Multiple Clients	10
Adding a Client Group.....	10
Creating a Saved Client List	11
Deleting a Saved Client List.....	12
Share Saved Lists	12
Using Saved Lists	13
Saving your Searches.....	14
Bulk Updating Clients.....	14
Updating a Non IYSS Client.....	15
Adding a Client to IYSS	18
Adding a New Client - Standard	18
Adding a New Client - Simple	20
Submitting Client Change Requests.....	22
Sending a request to add a client record.....	22
Sending a request to change a client record	22
Sending a request to delete a client record	23
Adding a Group Session	23
Converting Attendees to IYSS records	26
Converting One Clients to IYSS.....	26
Converting to IYSS - Simple	27
Making a Client Inactive.....	28
Searching IYSS records where the person is inactive.....	28

Searching for IYSS and One people records where the person is inactive.....	29
Changing Inactive details.....	30
04/ The Client Record.....	31
Navigating around the client record	31
Summary section	32
Updating client summary information	32
Situations section	34
Adding an Unlinked Situation.....	34
Adding a Linked Situation	35
Editing ETE Status.....	35
Interactions and Simple Activities section.....	37
Adding Interactions and Simple Activities.....	37
Appointments section.....	38
Adding an appointment to a client record	38
Updating an Appointment	39
Additional Needs section	40
Updating a client's additional needs	40
Individual Circumstances section.....	41
Updating a client's individual circumstances	41
Sexual Health section	42
Adding a Sexual Health Session	42
Carer Contacts section	43
Notes section	44
Adding a New Note:	44
Viewing and Change a Note	45
Professional Contacts and Involvements section	45
Adding a Lead Worker or Additional Worker	45
Adding a Lead Professional.....	46
Viewing One Involvements	47
Agencies and Referrals.....	47
Document, Notes and Assessments section	49
Adding a new Document.....	49
Changing an existing Document:.....	49
Importing a Document.....	50
Viewing an Imported Document.....	50
Adding an APIR to a Client Record	51
Consent to Share Information section	53
Changing Consent to Share Information	54
Qualifications and Attainments section	55
Adding Qualifications	55
Aspirations section.....	56
Updating Aspirations.....	57

Benefits and Allowances section	58
Adding a Client's Benefits and Allowances.....	58
Submitting an Opportunity	59
Creating a Key Client	60
Removing Key Client status from a client record.....	60
Bookmarking Clients	60
Special Alert	61
Adding a Special Alert.....	61
Removing a Special Alert	61
SMS and Email Messages.....	62
Sending a Message	62
05/ Providers and Opportunities.....	63
Searching and Viewing Providers.....	63
Searching and Viewing Opportunities.....	64
Adding a Provider.....	65
Adding a Vacancy Opportunity	66
More ways to add an Opportunity.....	68
06/ Youth Service (YS) Sessions	69
Adding a YS Activity.....	69
Adding Sessions to an Activity.....	71
Part 1 – Opening a new Session	71
Part 2 – Entering Curriculum details	73
Part 3 – Changing Client Attendees	74
Part 4 – Adding a Session Evaluation	77
Adding a Detached YS Session.....	77
Part 1 – Session detail and attending staff	78
Part 2 – Select/change Contacts	81
Duplicating a Detached YS Session	84
Deleting a Detached YS Session.....	85
Printing a Register	87
Adding YS Achievements	88
Showing a Provider under 'ys activities'	90
Optional: Adding the Opportunity to a different Provider	92
07/ Managing Caseloads.....	94
Overview	94
Caseload points	94
Caseload point variations.....	95
Staff variations examples.....	95
Client variations examples.....	95
Assigning Advisers to Managers.....	95
Removing Advisers from Managers.....	95
Viewing Caseload Management data	96

Changing a Client’s Caseload Points.....	97
Adding Manager Notes	97
My Caseload Tool	98
Viewing Caseload Management Data.....	99
08/ Appendix – System Administrator.....	100
Bulk Updating Client Records to IYSS.....	100
Reviewing the IYSS Bulk Updates Report.....	100
Bulk Updating Student Records to IYSS Records.....	100
Recording Youth Contract Interactions.....	102
Before you start:.....	102
Recording Youth Contract Interactions.....	103
Uploading Client Lists	105
Updating Clients to Baseline.....	106
Index	108

01 / Before you start basics

This chapter covers the basics of using OneIYSS.

Logging In

- To display the OneIYSS welcome screen, either:
 - Open an **Internet Explorer** window and enter the IYSS URL in the address bar
or
 - Double-click the **OneIYSS** shortcut on your Windows Desktop.
- In the OneIYSS **login** screen, enter your **User ID**, **Password** and the two requested characters from your memorable data.

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

Logging Out

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

System time out

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

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

Before you start basics

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

Navigating in OneLYSS

This section includes tips for navigating around OneLYSS.

Clicking links and buttons

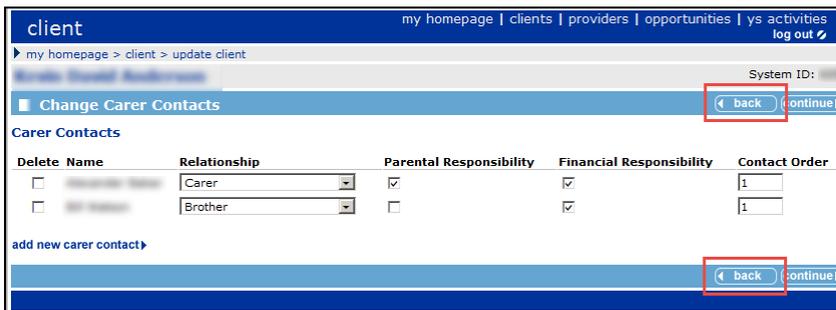
When you click a button or link in OneLYSS, you only need to click once. Do not double-click as this can:

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

Saving data

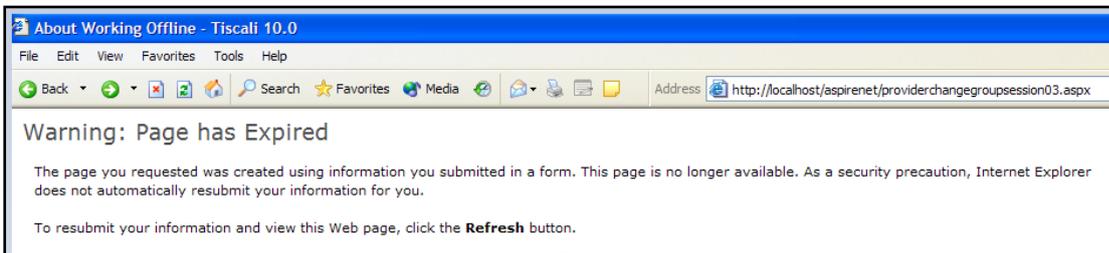
In OneLYSS, to save your changes, click the **continue** button. Occasionally however, there may be more than one dialog for adding information (e.g. Step 1 of 4) so in this case, clicking the **continue** button leads you through the steps.

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



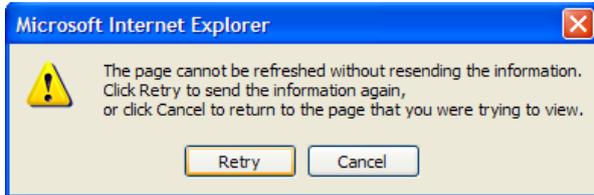
Browser Back Button and Page Expired message:

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



To try to recover the expired data:

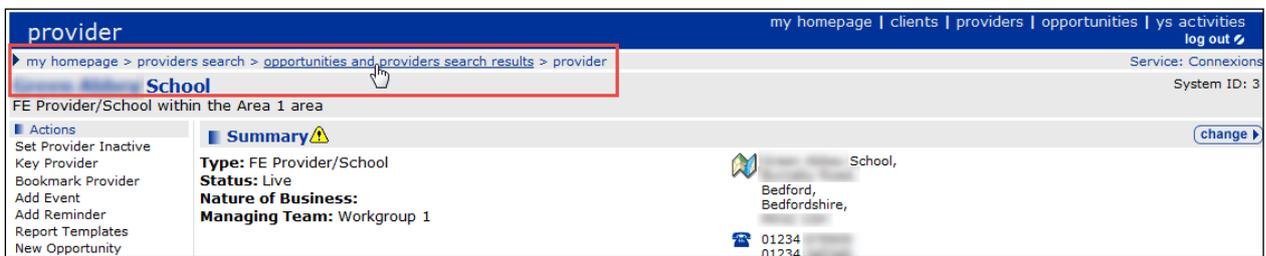
1. Click the **Refresh** button on the browser toolbar, or click the **F5** key, to display the following message:



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

Breadcrumb trail

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

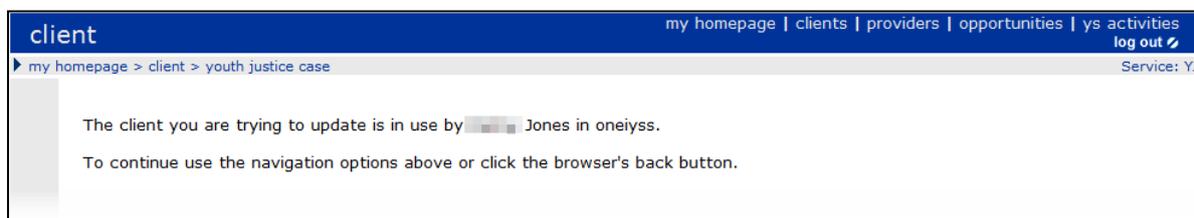


Unlocking Records

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

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

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



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

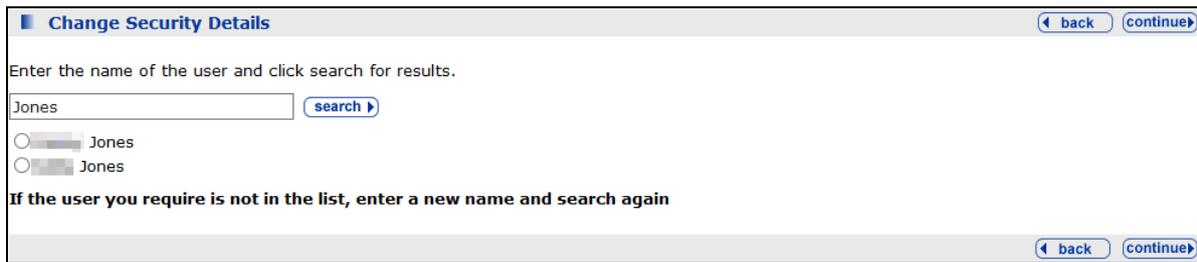
Before you start basics

To unlock the records:

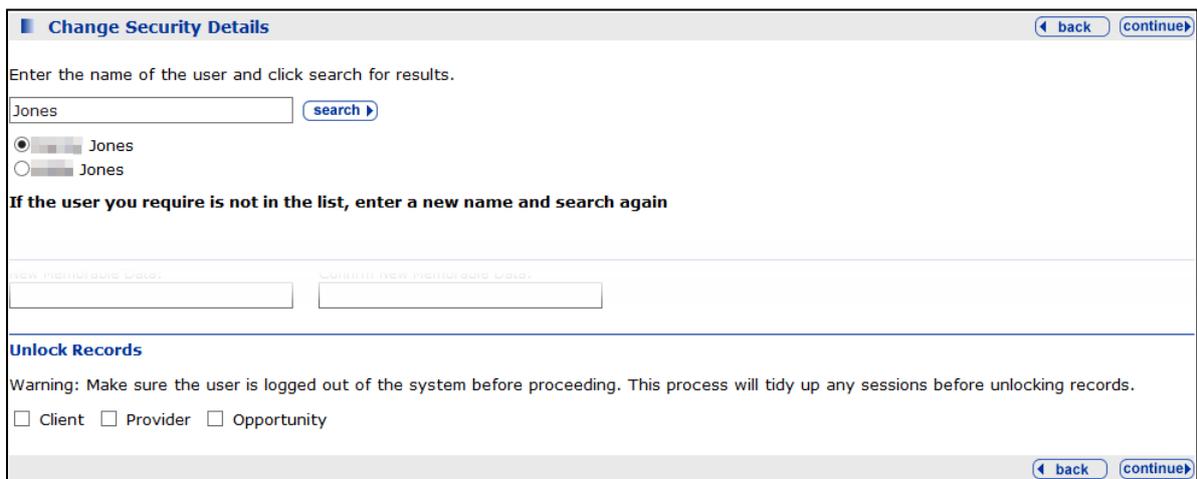
1. In the **IYSS Links** panel of **my homepage**, click the **User Security Details** hyperlink to display the **Change Security Details** page.



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



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



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

02 / About My Homepage

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

My Homepage

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

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

The screenshot shows the 'my homepage' interface with the 'General / Client' view selected. The navigation bar includes 'my homepage | clients | providers | opportunities | ys activities' and a 'log out' link. The main content area is divided into several modules:

- User:** Displays user information (User: IYSS Administrator, Tel: Not Available, Email: Not Available, Team: Workgroup 1, Centre: Centre 1, Service: Connexions) and links to 'change team/centre' and 'change passwords'.
- IYSS Links:** A list of links for managing IYSS data, including 'Update IYSS Year Groups', 'View Documents', 'Import User Document', 'View Reports', 'User Security Details', 'New Opportunity', 'New Provider', 'New Client - Standard', 'New Group Session', 'Youth Service MI Reports', 'New Client Request', 'Caseload Management', 'My Caseload Tool', 'Assign Users to Manager', and 'Cohort Management'.
- Today's Appointments:** Shows 'No appointments.'
- Future Appointments:** Shows a list of future appointments, including '28/03/2014 at 10:00 Appointment with...'.
- Missed Appointments:** Shows a list of missed appointments, including '10/05/2010 Appointment with...'.
- Future Events/Reminders:** Shows a list of future events/reminders, including '07/04/2014 at 10:00 Record Review/General with Job Centre notes' and '09/04/2014 at 10:00 Record Review/General with record reviewed...outcome pending'.
- My Caseload & Shared Searches:** A list of search filters for caseloads, including 'My Intensive Clients', 'My Supported level clients', 'My clients in NEET', 'My clients in Year 11 with dependencies', 'My clients with expired situations', 'My year 11 clients with an undecided intended destination', and 'Clients in NEET where I am a contact'.
- My Client Searches:** A search box with a search button and a dropdown menu showing 'All clients with stat ed leaving year 2010' and '2010 Leavers'.
- Key Clients:** A list of key clients, including 'NEET, Seeking Employment or Training from 01/09/2009', 'Statutory Education at [redacted] School, Year 11', and 'Statutory Education at [redacted] School, Year 11'.
- Useful Links:** A section for useful links.
- My eLearning Courses:** A section for eLearning courses.
- Last 5 Clients Viewed:** A list of the last 5 clients viewed, including 'Statutory Education at [redacted] School, Year 11', 'NEET, Seeking Employment or Training from 01/09/2009', 'Statutory Education at [redacted] School, Year 11', 'Statutory Education at [redacted] Secondary School, Year 11', and 'Emp No Trg upto NVQ1, Temporary Employment at Training from 01/07/2009'.

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

Client/General View

User

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

Search My Caseload

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

My Caseload & Shared Searches

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

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

My Client Searches

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

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

To delete a saved search:

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



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

Key Clients

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

For more details on assigning key status, see [Creating a Key Client](#) on page 60.

IYSS Links

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

Useful Links

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

My eLearning Courses

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

Last Clients Viewed

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

Appointments

Today's Appointments show any client appointments with today's date.

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

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

Future Events/Reminders

This module displays:

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

- clients that have been added to your caseload.

Referrals Awaiting an Outcome

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

Plan Reviews

This module displays a list of plans that need reviewing.

Provider/Opportunity View

Key Opportunities

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

Key Providers

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

Last Providers Viewed

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

My Saved Lists

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

More Information:

[Creating a Saved Client List](#) on page 11

Admin/Manager View

Baselines

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

Requests

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



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

03 / Client Searches

Searching for and viewing a single client record

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

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

The screenshot shows the 'clients' page with a navigation bar at the top containing 'my homepage | clients | providers | opportunities | ys activities | log out'. Below the navigation bar is a breadcrumb trail 'my homepage > client search' and a 'Service: Connexions' indicator. The main content area is titled 'Client Search' and contains several search criteria fields: 'Name', 'Alias', 'One ID', 'Date of Birth (dd mm yyyy)', 'Gender' (with a dropdown menu set to '(None)'), 'In Cohort', 'IYSS and People', 'IYSS Records (Person Inactive)', and 'IYSS Inactive Records'. There are also fields for 'ULN' and 'UPN'. Below these fields are three 'select' buttons for filtering by provider, opportunity, and statutory education provider, and a 'Statutory School Leaving Year' field. At the bottom, there is a list of categories with 'more' dropdown arrows: Situation Groups, Baselines, General, Location, Caseload, Aspirations & Qualifications, Additional Needs, Individual Circumstances, With Contact, YS Sessions, Targeted Youth Support, Youth Justice, and YJ Data Checking.

2. **Enter** a full name, e.g. Jordan Smith, or a partial name, e.g. J Smith in the **Name** field.
By default, only clients who exist as IYSS clients are returned. To widen the search:
 - Select the **In Cohort** check box to return clients in the One Youth suite cohort
 - Select the **IYSS and People** check box to return clients in IYSS and the One People database
 - Select the **IYSS Records (Person Inactive)** check box to return clients where the person is **Inactive**
 - Select the **IYSS Inactive Records** check box to return inactive records in IYSS, e.g. if clients are not in the cohort age range.

NOTE: For more information on inactive clients and records, see [Making a Client Inactive](#) on page 26.

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

clients my homepage | clients | providers | opportunities | ys activities log out

my homepage > client search > client search results

Actions

- New Search
- Save Search
- Select All Clients On Page
- Report Templates
- Print Page

Views

- Condensed
- Card
- Yr11 Guarantee Summary
- Yr11 Guarantee Detail

Search Results

3 client(s) found, showing 1 - 3 of 3

To select the client tick the box of each client name required then click add to group.
To search again for additional clients click New Search to clear criteria.

[add to group](#)

Name	Date of Birth	Postcode / Address	Current Situation	Team
<input type="checkbox"/> [Name] - [Address] (Outside Lead LA)	07/01/1998	(20) Address Unknown	Statutory Education at [School], Year 11	Workgroup 2
<input type="checkbox"/> [Name] - [Address] (Outside Lead LA)	23/01/1998	(16) MK [Address]	Statutory Education at [School], Year 11	Workgroup 1
<input type="checkbox"/> [Name] - [Address] (Outside Lead LA)	29/01/1998	(18) No Correspondence Address	Statutory Education at [School], Year 11	Workgroup 1

3 client(s) found, showing 1 - 3 of 3

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

Search tips:

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

clients my homepage | clients | providers | opportunities | ys activities log out

my homepage > client search results

Actions

- New Search
- Select All Clients On Page
- Report Templates
- Print Page

Views

- Condensed
- Card
- Yr11 Guarantee Summary
- Yr11 Guarantee Detail

Search Results

17 client(s) found, showing 1 - 17 of 17

To select the client tick the box of each client name required then click add to group.
To search again for additional clients click New Search to clear criteria.

[add to group](#)

Name	Date of Birth	Postcode / Address	Current Situation	Team
<input type="checkbox"/> [Name] - [Address] (20) No Correspondence Address			Statutory Education at [School], Year 11	Workgroup 1
<input type="checkbox"/> [Name] - [Address] (19) No Correspondence Address			Statutory Education at [School], Year 11	Workgroup 1

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

Searching for Multiple Clients

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

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

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

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

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

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

Adding a Client Group

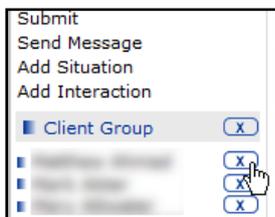
You can add clients to a client group on which you can run reports or perform bulk updates. Client groups are temporary and only last for as long as your current session. If you wish to make a permanent group of clients, complete the following task then see [Creating a Saved Client List](#) on page 11.

1. Search for students based on your required criteria. For more information, see [Searching for Multiple Clients](#) on page 10.
2. To add clients to the group, from the clients returned by your search:
 - Select the clients you want to add to a client group by selecting the check box adjacent to the student's name.
 - or
 - To add all displayed clients, click **Select All Clients On Page** on the **Actions** panel.
3. Click the **add to group** button to add the selected clients to the **Client Group** panel on the left-side of the dialog.



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

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



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

Creating a Saved Client List

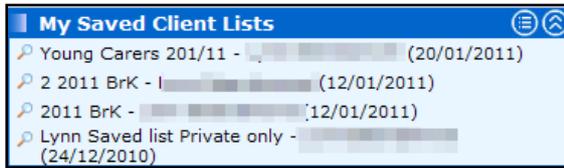
You can create a permanent client list that is saved even after you log out.

1. Create a client group. For more information, see [Adding a Client Group](#) on page 10.

Client Searches

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

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



Deleting a Saved Client List

To delete a saved client list:

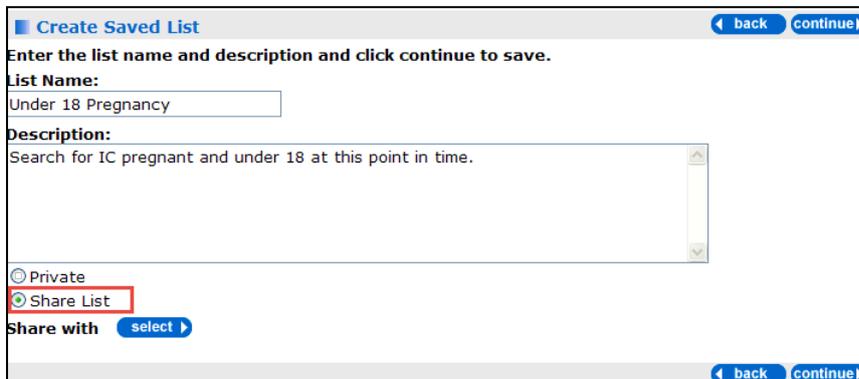


- Click the **Configure** button to display the **Delete My Saved Client Lists** page.
- Select the check box for the client list you wish to delete.
- Click the **continue** button.

Share Saved Lists

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

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



The screenshot shows the "Create Saved List" form with the following fields and options:

- List Name:** Under 18 Pregnancy
- Description:** Search for IC pregnant and under 18 at this point in time.
- Share with:** Private (selected), Share List (highlighted with a red box)
- Buttons:** back, continue (top right), select (bottom left), back, continue (bottom right)

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

Using Saved Lists

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

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

Client Searches

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

The screenshot shows a web interface titled "Add Individual Attendees". On the left is a sidebar with "Actions" (New Search, Select All Clients To Group, Select All Clients On Page) and "Attendees" (a list of names with 'x' icons). The main area is "New Attendees" with instructions: "To add the clients who attended the session use the search facility below. When all the attendees have been added click continue." Below this is the "Client Search" section with instructions: "To search for clients enter search criteria and click search." There are two radio buttons: "Search clients by surname, forename, system ID or date of birth" (selected) and "Search clients by School / College and Year Group". The first search method includes fields for Surname, Forename, System ID, and Date of Birth (dd mm yyyy). The second method includes dropdowns for Institution Type, School / College, and Year Group. Below these are three radio buttons for session history: "Clients that have attended any session for this activity", "Clients that have attended a particular previous session" (with sub-options for 18/12/2010 12:00, 17/12/2010 12:00, and 30/06/2010 12:00), and "Search clients by Saved Lists" (with sub-options for Young Carers 201/11, Lynn Saved list Private only, 2 2011 BrK, and 2011 BrK). "back" and "continue" buttons are at the top and bottom right.

Saving your Searches

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

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

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



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

Bulk Updating Clients

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

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

To apply a bulk update:

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



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

A screenshot of the 'Change Lead Worker' screen. It has a title bar with 'Change Lead Worker' and 'back' and 'continue' buttons. Below the title bar, it says 'Enter the name of the lead worker and click search for results.' There is a text input field and a 'search' button. At the bottom, there are 'back' and 'continue' buttons.

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

A screenshot of the 'Change Lead Worker' screen after a search. It shows a table of results with columns: Name, Role, Team, and Centre. The first row is selected with a radio button. Below the table, it says 'If the adviser you require is not in the list, enter a new name and search again'. At the bottom, there are 'back' and 'continue' buttons.

Name	Role	Team	Centre
<input type="radio"/>	Personal Adviser	Workgroup 3	Centre 3
<input checked="" type="radio"/>	Personal Adviser	Workgroup 1	Centre 1
<input type="radio"/>	Personal Adviser	Workgroup 1	Centre 1
<input type="radio"/>	Personal Adviser	Workgroup 1	Centre 1
<input type="radio"/>	Personal Adviser	Workgroup 2	Centre 1
<input type="radio"/>	Personal Adviser	Workgroup 2	Centre 2

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

A screenshot of the 'Bulk Update Lead Worker' screen. It has a title bar with 'Bulk Update Lead Worker' and a 'continue' button. Below the title bar, it says 'Click Continue to begin bulk update. This may take some time to complete.' There is a large blue bar at the bottom.

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

A screenshot of the 'Bulk Update Lead Worker' screen during processing. It has a title bar with 'Bulk Update Lead Worker'. Below the title bar, it says 'Processing...Please Wait -'. There is a large blue bar at the bottom.

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

Updating a Non IYSS Client

To open a client record in OneIYSS, the record must be marked as 'IYSS'. If you search for a client who exists in the One database as a student but is not yet marked as an IYSS client, the

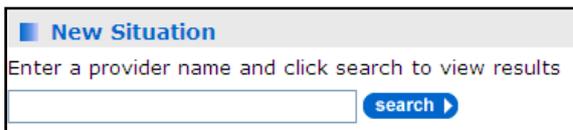
Client Searches

message **Non IYSS Client** is displayed in the search results. You cannot open the record until additional CCIS data has been added, as described in the following procedure.

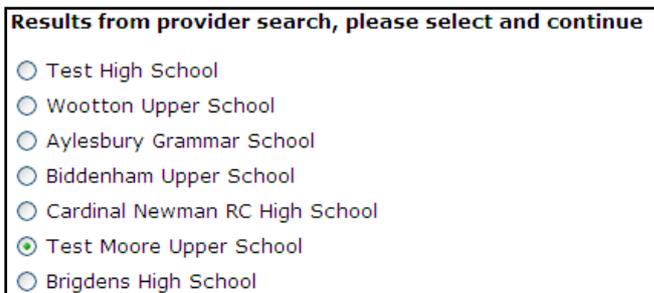
1. From the results of a client search, click on the client's **Name** you want to update to display the **Update Client – New Situation** dialog.
2. Add a statutory education situation for the client:
 - a. Select **Statutory Education** from the dropdown list.



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

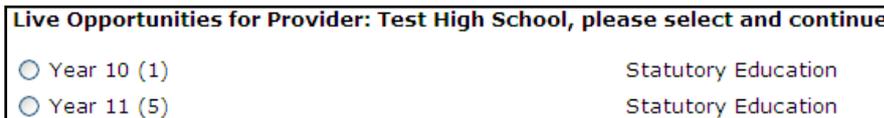


- c. Enter the name of the client's statutory education provider in the **Enter a provider....** search box, then click the **search** button to display the search results.



- Test High School
- Wootton Upper School
- Aylesbury Grammar School
- Biddenham Upper School
- Cardinal Newman RC High School
- Test Moore Upper School
- Brigdens High School

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



- Year 10 (1) Statutory Education
- Year 11 (5) Statutory Education

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

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

Update Client - Further Details

Managing Team * Managing Centre *
(none) ▼

Actual Qualification Level Supported Level *
(none) ▼

Lead Worker *
(none) ▼

Final Education Details

Add Final Further Education Details new ▶

Key Client Details

Key Client of mine

Email me when this client is updated

Type of link required on my homepage None ▼

5. Complete the following fields:

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

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

Adding a Client to IYSS

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

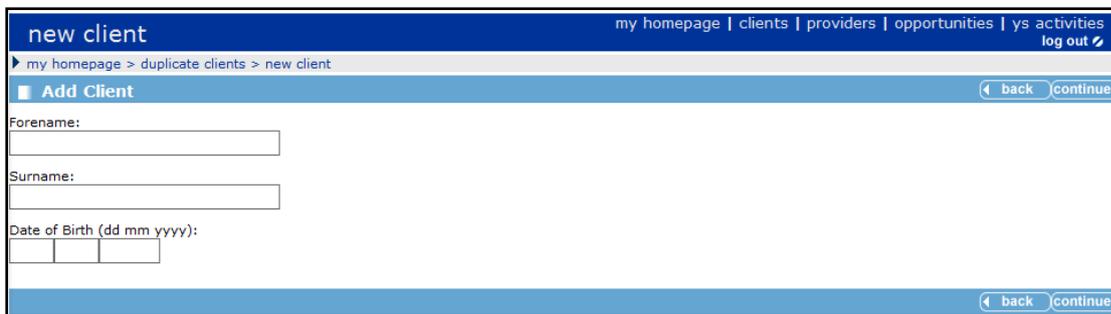
- **New Client – Standard.** This is the usual process for manually adding a new client to IYSS.
- **New Client – Simple.** This process enables you to add a new client without needing to add as much data as the standard method.

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

Adding a New Client - Standard

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

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



The screenshot shows a web browser window with the title 'new client'. The breadcrumb trail is 'my homepage > duplicate clients > new client'. The main heading is 'Add Client'. There are three input fields: 'Forename:', 'Surname:', and 'Date of Birth (dd mm yyyy):'. The 'Date of Birth' field is a date picker. At the bottom right, there are 'back' and 'continue' buttons.

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

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

If matching clients exist, the search results are displayed.

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

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

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

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

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

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

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

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

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

Submitting Client Change Requests

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

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

Sending a request to add a client record

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

The screenshot shows a web form titled "new client request". At the top right, there are links for "my homepage | clients | providers | opportunities | ys activities" and a "log out" button. Below the title bar, there's a breadcrumb "my homepage > new client request" and "Service: Connexions". The main heading is "New Client Request" with "back" and "continue" buttons. The form has several sections:

- Name ***: A grid of radio buttons for titles: Br, Dr, Mr, Prof, WPC, Cllr, Fr, Mrs, Rev, _LK, Cmdr, Lady, Ms, Sir, Cn, Miss, PC, The.
- Forename:**, **Surname:**, and **Known As:** text input fields.
- Date of Birth:** three separate input boxes for day, month, and year.
- Gender ***: Radio buttons for "Not Specified", "Female", and "Male".
- Ethnicity ***: A text input field.

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

Sending a request to change a client record

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

The screenshot shows a client record interface. On the left is an "Actions" panel with a list of options: "Change Client Request" (highlighted), "Set Client Inactive Request", "Set Student to Deceased/Inactive", "Set IYSS Client Inactive", "Add Appointment", "Key Client", and "Bookmark Client". On the right is a "Summary" panel with the following information:

- Date of Birth:** [redacted] (Age 18)
- Gender:** Female
- ULN:**
- UPN:**
- Ethnicity:** WBRI - British

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

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

Sending a request to delete a client record

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

Adding a Group Session

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

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

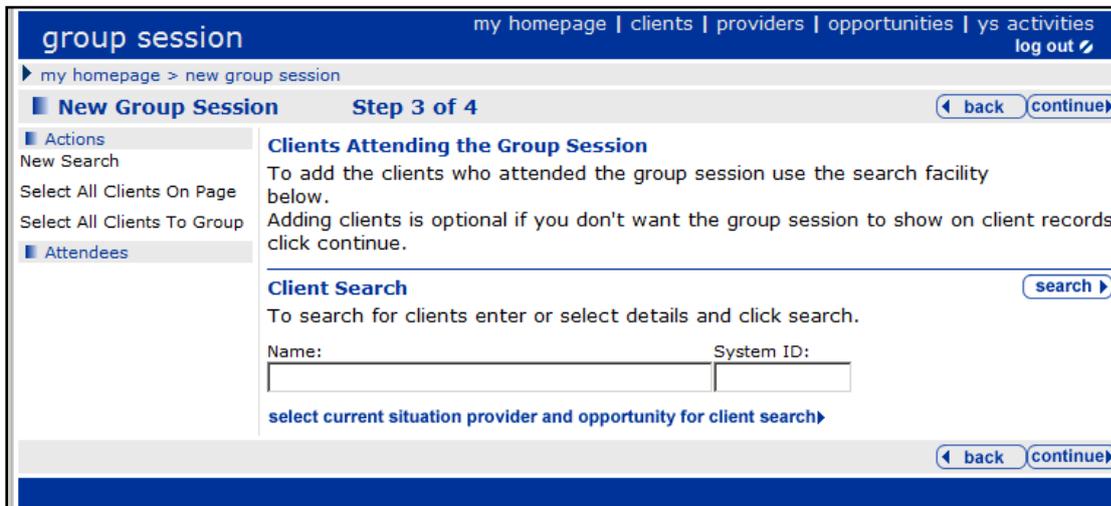
NOTE: OneIYSS defaults to your user name for recording the session. To change the user, click the **change** button and add the required user.

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

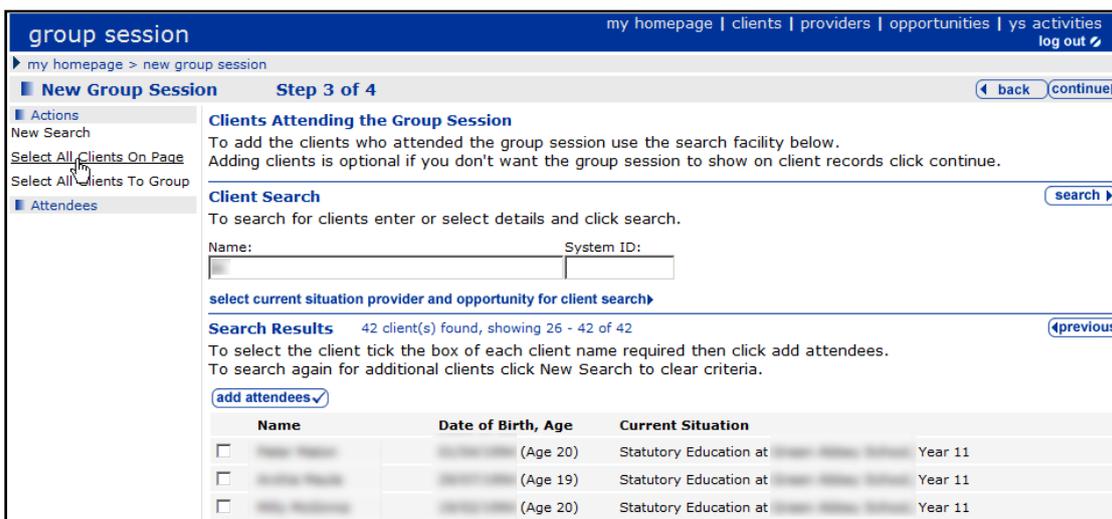
- Click the **search** button to display the search results.



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



- Add the clients who attend the group session, either by searching on **Name/System ID** or current situation provider/opportunity.
 - Enter a **Name** or **System ID** then click the **Search** button to display the search results.
 - Select the clients you want to add to the group sessions. To select all clients, click **Select All Clients On Page** on the **Actions** panel on the left-side of the dialog.



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

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

group session my homepage

my homepage > new group session

New Group Session Step 3 of 4

Actions
 New Search
 Select All Clients On Page
 Select All Clients To Group

Attendees

Clients Attending the Group Session
 To add the clients who attended the group session use the s
 Adding clients is optional if you don't want the group session

Client Search
 To search for clients enter or select details and click search.

Name: System ID:

[select current situation provider and opportunity for client search](#)

Search Results 42 client(s) found, showing 26 - 42 of 42

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

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

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

group session my homepage | clients | providers | opportunities | ys activities log out

my homepage > new group session

New Group Session Step 4 of 4 back continue

What did the group session cover? Select from the activity list or add a description.

Agree MV Plan Decision Making Discussed FE
 Discussed H.E. Information Sharing Discussed Issue Course of Action
 Issue Go For It Factfile Issue MV 100 Hour Award Issue MV 200 Hour Award
 Issue Young Persons Charter Job seeking skills Options Post FE
 Post 16 Options Referral - Vol Organisations WE Information

Group Session Description

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

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

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

Converting to IYSS - Simple

To convert a One client to an IYSS client:

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

Name	Date of Birth	Postcode / Address	Current Situation	Team
[Redacted]	20/06/2000	No Correspondence Address	Non IYSS Client	

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

Enter a provider name and click search to view results

Results from provider search, please select and continue

Green Hill School (3)

Green Hill Secondary School (2)

If the provider you require is not in the list, enter a new provider name and search again.

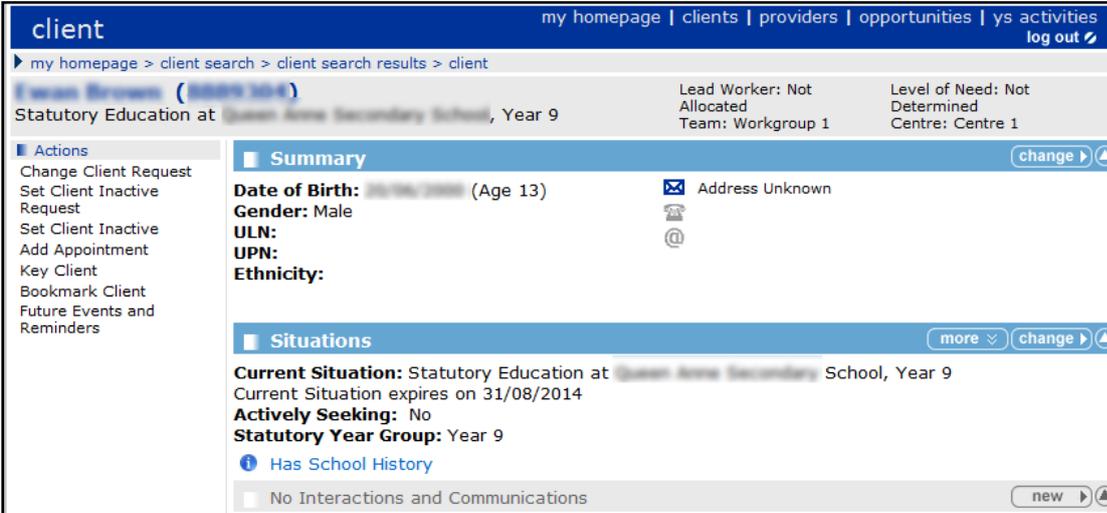
3. Search for the last or current school for the client by entering a name, then click the **search** button to display the search results.
4. Select a school from the list, then click the **continue** button to display the **Update Client – Confirmation** dialog.

Name: [Redacted]
Date of Birth: [Redacted] 2000
Situation: Statutory Education / Year 9 on 01/09/2013

Click continue to update client

Client Searches

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



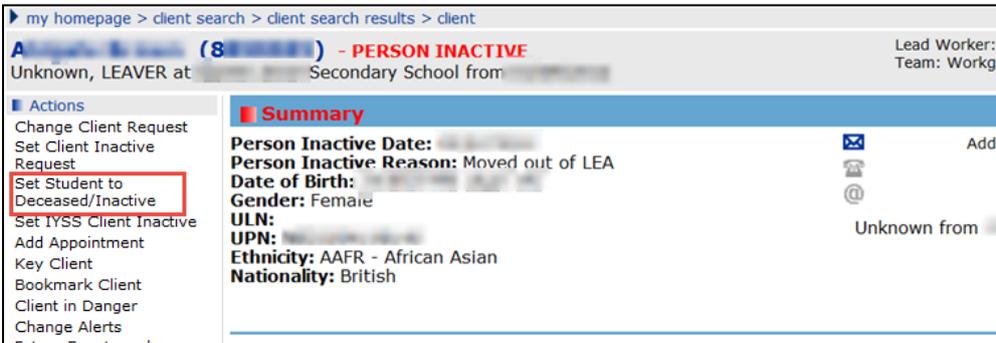
The screenshot shows the OneYSS interface for a client search. The client is identified as Ewan Brown (DOB: 10/10/2000). The current situation is 'Statutory Education at Green Area Secondary School, Year 9'. The 'Actions' panel on the left includes options like 'Change Client Request', 'Set Client Inactive Request', and 'Add Appointment'. The 'Summary' panel on the right shows 'Date of Birth: 10/10/2000 (Age 13)', 'Gender: Male', 'ULN: [redacted]', 'UPN: [redacted]', and 'Ethnicity:'. Below the summary, the 'Situations' section shows the current situation and its expiration date (31/08/2014). The 'Actively Seeking' status is 'No', and the 'Statutory Year Group' is 'Year 9'. There is also a link for 'Has School History' and a 'new' button at the bottom right.

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

Making a Client Inactive

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

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



The screenshot shows the OneYSS interface for a client search. The client is identified as A. [redacted] (DOB: [redacted]) and is marked as 'PERSON INACTIVE'. The current situation is 'Unknown, LEAVER at [redacted] Secondary School from [redacted]'. The 'Actions' panel on the left includes options like 'Change Client Request', 'Set Client Inactive Request', and 'Set Student to Deceased/Inactive' (highlighted with a red box). The 'Summary' panel on the right shows 'Person Inactive Date: [redacted]', 'Person Inactive Reason: Moved out of LEA', 'Date of Birth: [redacted]', 'Gender: Female', 'ULN: [redacted]', 'UPN: [redacted]', 'Ethnicity: AAFR - African Asian', and 'Nationality: British'. The 'Lead Worker' and 'Team' fields are also visible.

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

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

Searching IYSS records where the person is inactive

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

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

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

The screenshot shows the 'Client Search' interface. The 'IYSS Records (Person Inactive)' checkbox is checked and highlighted with a red box. Other search criteria include Name, Alias, One ID, Date of Birth, Gender, In Cohort, IYSS and People, IYSS Inactive Records, ULN, and UPN.

The following results are displayed:

The screenshot shows the 'Search Results' section. It indicates '1 client(s) found, showing 1 - 1 of 1'. Below this is a table with columns: Name, Date of Birth, Postcode / Address, Current Situation, and Team. The table contains one entry for an inactive person.

Name	Date of Birth	Postcode / Address	Current Situation	Team
<input type="checkbox"/> (Inactive Person) Al		Address Unknown	Unknown, LEAVER at School from	Secondary Workgroup 1

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

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

The screenshot shows the 'Client Search' interface. Both the 'IYSS and People' and 'IYSS Records (Person Inactive)' checkboxes are checked and highlighted with a red box.

This returns the following result:

The screenshot shows the 'Search Results' section. It indicates '3 client(s) found, showing 1 - 3 of 3'. Below this is a table with columns: Name, Date of Birth, Postcode / Address, Current Situation, and Team. The table contains three entries, all for inactive persons.

Name	Date of Birth	Postcode / Address	Current Situation	Team
<input type="checkbox"/> (Inactive Person) Al		Address Unknown	Unknown, LEAVER at School from	Secondary Workgroup 1
<input type="checkbox"/> (Inactive Person) E (Outside Lead LA)		No Correspondence Address	Non IYSS Client	
<input type="checkbox"/> (Inactive Person) A (Outside Lead LA)		No Correspondence Address	Non IYSS Client	

Changing Inactive details

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

You can edit the following fields, if required:

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

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

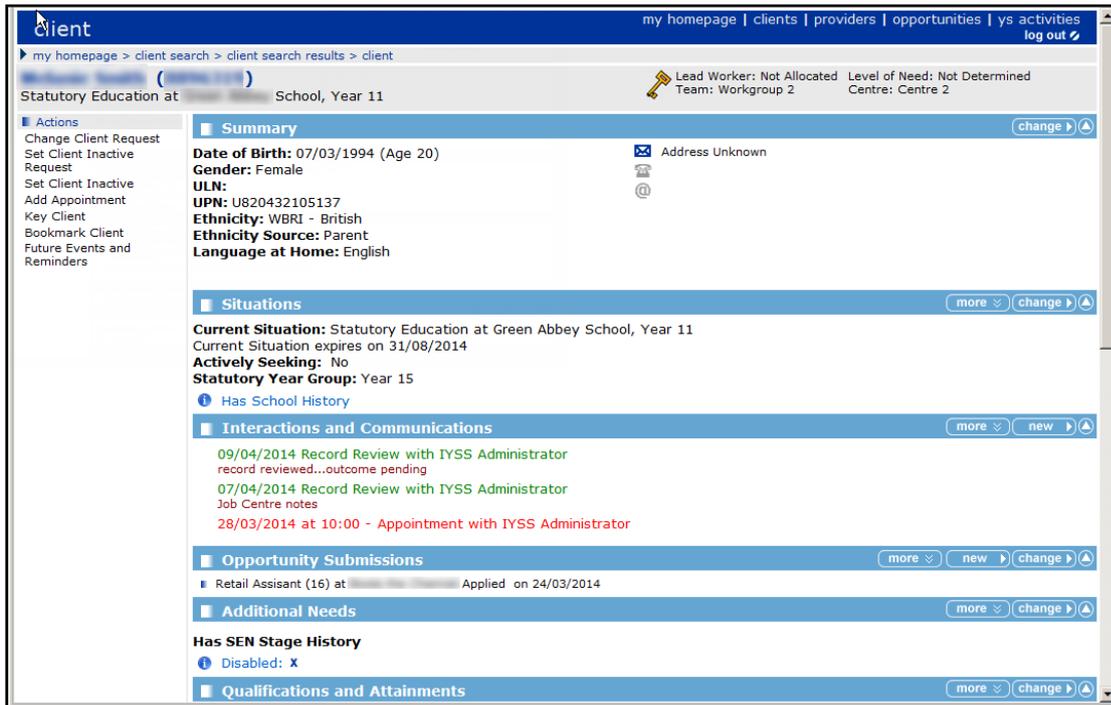
Additionally, the **Add New Client** function displays inactive records in search results. For more information see [Adding a Client to IYSS](#) on page 18.

Name	Date of Birth	Postcode / Address	Current Situation	Team
(Inactive Person) A (Outside Lead LA)			Non IYSS Client	

04 / The Client Record

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

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



Navigating around the client record

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



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

Summary section

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

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

Updating client summary information

To amend or add information in the Client Summary section:

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

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

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

The screenshot shows a form titled "Contact Address" with a "find address" link. Below it, there are fields for "DeleteAddress" (with a checkbox), "Mail" (with a checked checkbox), "Type" (with a dropdown menu showing "Home Address"), "Start" (with two date input boxes), and "End" (with two date input boxes). A blue "continue" button is visible on the right.

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

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

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

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

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

- 8. Enter the **Contact Details** for the young person. Select the **Preferred Contact** check box next to the number through which the client prefers to be reached. The email address and mobile number must be unique to the client. For more information about sending electronic messages to clients, see [SMS and Email Messages](#) on page 62.
- 9. Select the relevant **Immigration Status** radio button.
- 10. If required, enter any **LAC Status Notes** in the text field.
- 11. If the appropriate YOT is not displayed in the **YOT Residence Status** panel:
 - a. Click the **new** button to display the **YOT Residence Status** panel.
 - b. Select the required **Status**.
 - c. If the **Status** is **Other**, select the required YOT from the **Other YOT** drop-down list.
 - d. Enter an **Effective Date**.

The screenshot shows a form titled "YOT Residence Status" with "back" and "continue" buttons at the top right. It contains:

- Status: Radio buttons for "Local" and "Other" (selected).
- Effective Date: Three input boxes for day, month, and year, followed by a calendar icon.
- Other YOT: A dropdown menu currently showing "(none)".

 "back" and "continue" buttons are also at the bottom right.

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

Situations section

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

Adding an Unlinked Situation

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

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

The screenshot shows the 'Change Situations' dialog with the following details:

- Header:** client | my homepage | clients | providers | opportunities | ys activities | log out
- Navigation:** my homepage > client > update client | System ID: 429
- Section:** Change Situations (back | continue)
- New Situation:** To add a new primary situation, select a situation group and click 'new'. A dropdown menu is open showing options: (none), Higher Education, Sixth Form College, School Sixth Form, Statutory Education, FE College, Emp/Trg NVQ2 & above, Emp No Trg upto NVQ1, Moved out of Area, No Information, Other, **NEET**, Work Based Learning.
- Current Situation:** Current Situation expires on 31/08/2014. Last confirmed on 28/03/2014 by IYSS Administrator, Workgroup 1. Verification Source of Client.
- Situation History:**

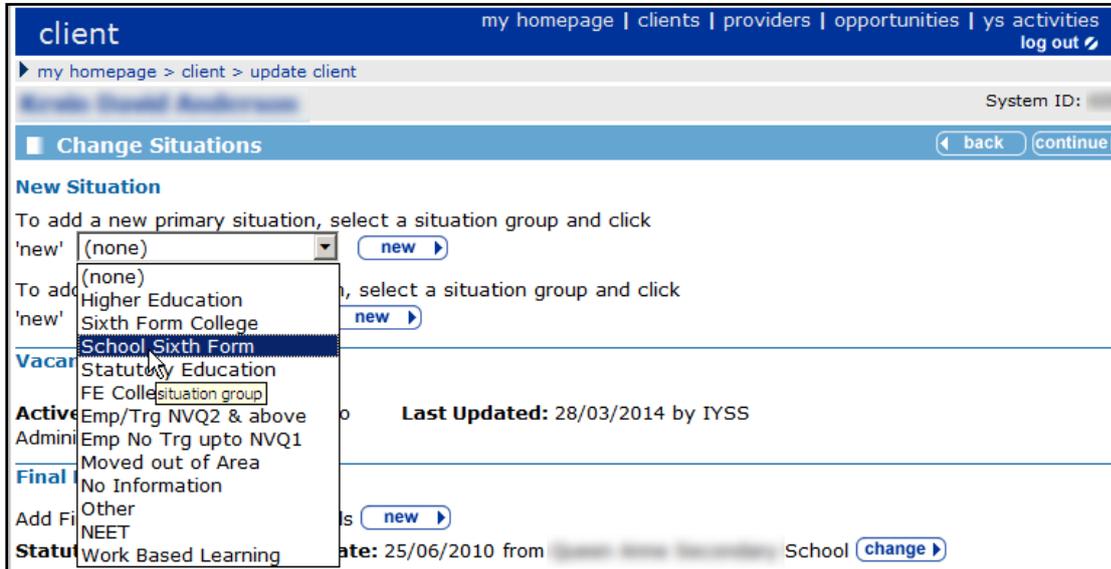
Delete Situations	Start Date	End Date	Wks	Prim	Conf
<input type="checkbox"/> Statutory Education at School, Year 11	01/09/2009		244	◆	◆

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

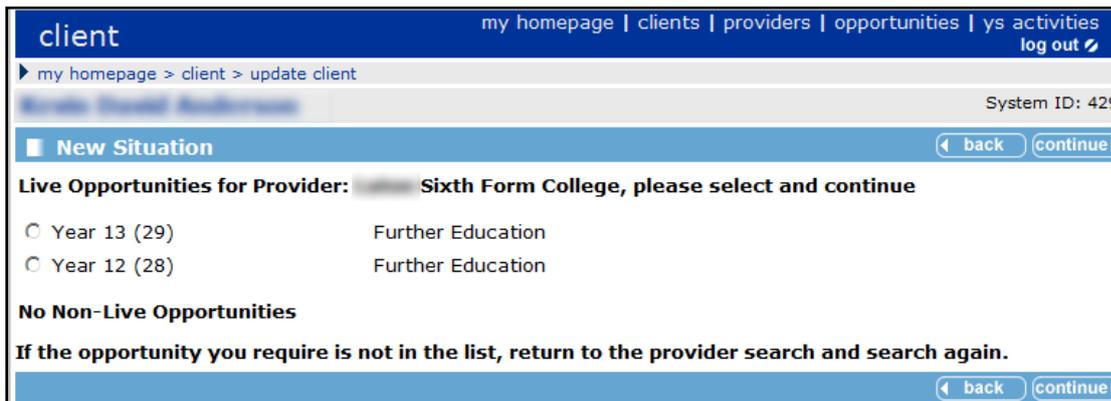
Adding a Linked Situation

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

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



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



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

Editing ETE Status

A client's current status in regard to education, training or employment (ETE) is displayed in the **Situations** panel in the **Summary** screen. The **Current Situation** has an expiry date, to

The Client Record

encourage the monitoring of end of school year activity and changes. The ETE hours (the time a client spends in ETE activity) must be recorded.

To record the ETE hours:

1. Access the required client record.

The screenshot shows a web application interface for a client record. At the top, there is a navigation bar with links for 'my homepage', 'clients', 'providers', 'opportunities', and 'ys activities', along with a 'log out' button. Below the navigation bar, the page title is 'client'. The main content area is divided into several sections:

- Actions:** A list of actions including 'Change Client Request', 'Set Client Inactive Request', 'Set Student to Deceased/Inactive', 'Set IYSS Client Inactive', 'Add Appointment', 'Key Client', 'Remove Bookmark', 'Client in Danger', 'Change Alerts', and 'Future Events and Reminders'.
- Summary:** A section containing personal information: 'Date of Birth', 'Gender', 'ULN', 'UPN', 'Ethnicity', and 'Language at Home'. It also indicates 'Client has Other Addresses'.
- Situations:** A section showing the 'Current Situation' as 'Statutory Education at [redacted], Year [redacted]'. It also displays 'Actively Seeking: No' and 'Statutory Year Group: Year [redacted]'. There is a 'Youth Justice Notification: 1 Notification' and a 'Youth Justice Case' section with details like 'Status: Open as of [redacted]', 'Case Type: Active', 'Intervention Level', 'ROSH Level', 'Vulnerability Level', 'Case Review Due On: [redacted]', and 'Lead Case Worker: Danny Jones'.
- Current Intervention Programmes:** A table with columns 'Main Type', 'Term', and 'Dates'. One entry is 'Conditional Caution' with a term of '5 months'.

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

The screenshot shows the 'Change Situations' screen. It has a title bar with 'Change Situations' and navigation buttons for 'back' and 'continue'. The main content area is divided into several sections:

- New Situation:** A section for adding new situations. It includes a dropdown menu for 'New primary situation' and 'New secondary situation', both currently set to '(None)', and 'new' buttons.
- Vacancy Matching:** A section with 'Actively Seeking' radio buttons for 'Yes' and 'No'.
- Final Education Details:** A section with an 'Add Final Further Education Details' button.
- Statutory Education Leaving Date:** A section with a date field and a 'change' button.
- Current Situation:** A section showing 'Current Situation expires on [redacted]' and 'Last confirmed on [redacted] by Danny Jones, Workgroup [redacted]. Verification Source of [redacted]'.
- Situation History:** A table with columns 'Delete', 'Situations', 'Start Date', 'End Date', 'Wks', 'Prim', and 'Conf'. One entry is 'Statutory Education at [redacted], Year [redacted]' with 'Start Date' [redacted], 'End Date' [redacted], 'Wks' 105, 'Prim' [redacted], and 'Conf' [redacted].

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

Interactions and Simple Activities section

Adding Interactions and Simple Activities

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

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

The screenshot shows the 'New Interaction' dialog. At the top, there is a breadcrumb trail: 'my homepage > client > update client'. Below this, the 'New Interaction' title is displayed with 'back' and 'continue' buttons. The main area contains a grid of interaction types, each with an information icon (i) and a radio button. The 'Annual/Transitional Review' option is selected. Other options include 'Case Con/Cmn Assess Framework', 'Email/Letter/Text', 'Information Sent/Given', 'Interview (non PA/Trainer)', 'PA Interview', 'Record Review', and 'Telephone Call'. At the bottom, there are 'back' and 'continue' buttons.

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

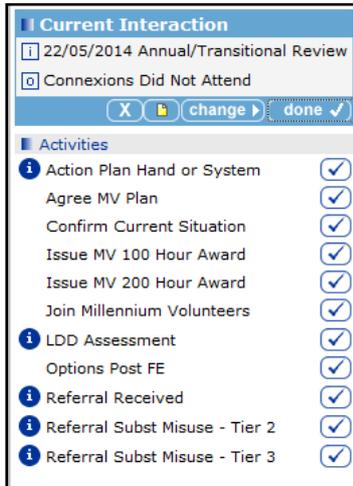
2. Select an **Interaction Type** and click the **continue** button to display the relevant interaction dialog, e.g. **New Annual/Transactional Review** dialog.

The screenshot shows the 'New Annual/Transitional Review' dialog. It features a breadcrumb trail: 'my homepage > client > update client'. The title 'New Annual/Transitional Review' is at the top with 'back' and 'continue' buttons. Below the title, there are input fields for 'Date (dd mm yyyy):' (22/05/2014), 'Start (hh mm):' (15:53), and 'End (hh mm):' (15:53). There are checkboxes for 'Client Present' and 'Carer Present'. A section titled 'This interaction will be recorded for:' contains dropdown menus for 'Team: Workgroup 1', 'User: IYSS Administrator', and 'Centre: Centre 1'. The 'Category *' section has radio buttons for Year 10, 11, 12, 13, 14, 7, 8, and 9. The 'Outcome *' section has radio buttons for 'Connexions Attended' and 'Connexions Did Not Attend'. The 'Venue' section has radio buttons for None, Community Based, Employer, Other, YOI, Connexions Office, Home Visit, Outreach Centre, Education, Job Centre, and Training Provider. At the bottom, there is a text area for 'Interaction Notes'.

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

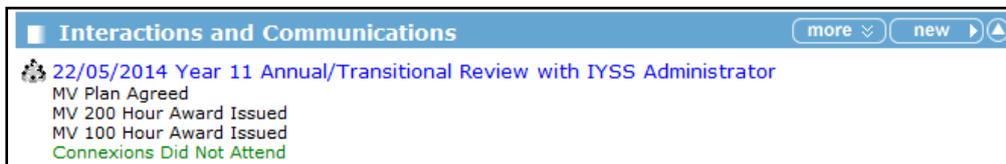
The Client Record

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



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

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

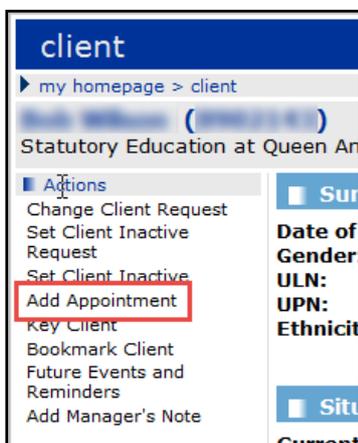


Appointments section

Adding an appointment to a client record

To add an appointment to a client record:

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



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



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



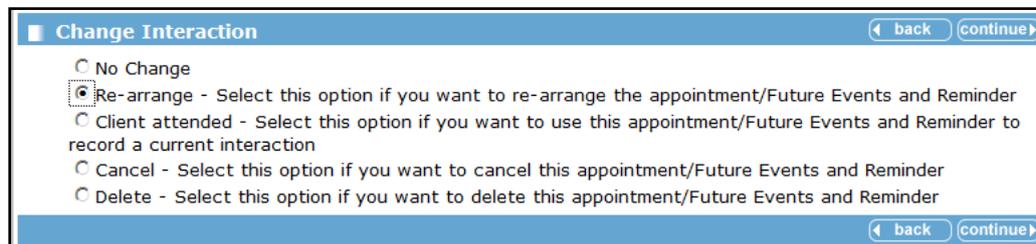
Updating an Appointment

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

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



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



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

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

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

Additional Needs section

Updating a client's additional needs

NOTES: Recording and regularly updating a client's additional needs is important to make sure the client receives the support they require.

SEN stage history and disability information is pulled through from One v4 and is read-only in IYSS.

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

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

The screenshot shows a web interface for updating a client's additional needs. At the top, there is a navigation bar with 'client' and 'my homepage | clients | providers | opportunities | ys activities' and a 'log out' button. Below this is a breadcrumb trail: 'my homepage > client > update client'. The main content area is titled 'Change Additional Needs' and includes a 'back' button and a 'continue' button. The 'SEN Notes' section has a text area for entering additional notes and a message stating 'No Previous SEN Notes'. The 'Plan Details' section includes a checkbox for 'S139a Plan', a 'Year' input field, a 'Status' dropdown menu (currently set to '(none)'), and a checkbox for 'Update Plan Completed Details'. Below this is a 'Plan Notes' text area. The 'Health Issues' section contains a grid of checkboxes for various conditions: Allergy Sufferer, Attention Deficit Disorder, Dyspraxia, Epilepsy, Phobia, Aspergers Syndrome, Downs Syndrome, Eating Disorder, Mental Health Issues, Sexual Health Issues, Asthma, Dyslexia, Eczema, Other Health Issue, and Tourettes Syndrome.

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

Individual Circumstances section

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

Updating a client’s individual circumstances

To update individual circumstances:

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

Delete	Individual Circumstance	Start Date	End Date	Expected End Date	Agencies Involved
<input type="checkbox"/>	English as Second Language	28 03 2014			
<input type="checkbox"/>	Family Problems	28 03 2014			
<input type="checkbox"/>	Gifted & Vulnerable	28 03 2014			
<input type="checkbox"/>	No Fixed Abode	28 03 2014			
<input type="checkbox"/>	Substance Misuse	28 03 2014			
<input type="checkbox"/>	Substance Use	28 03 2014			
<input type="checkbox"/>	Teenage Mother	28 03 2014			
<input type="checkbox"/>	Traveller / Gypsy	28 03 2014			

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

my homepage | clients | providers | opportunities | ys activities
log out

my homepage > client search > client search results > client > update client
System ID: 429

New Individual Circumstances back continue

New individual circumstances are applicable from (dd mm yyyy): 07 05 2014

Select new individual circumstances:

- Attends Spec Ed Provision
- Care Leaver
- Demotivated/Uncommitted
- Educated Out of Mainstream
- Excluded FT Education Pre 16
- Literacy/Numeracy Needs
- Looked After/In Care
- Pregnant
- Refugee/Asylum Seeker
- Social/Community Difficulties
- Suspended FT Education Pre 16
- WW Drug Action Team
- Young Carer

Notes
Enter notes below:

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

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

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

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

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

Sexual Health section

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

Adding a Sexual Health Session

To add a sexual health session:

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

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

- Enter all details relating to the sexual health session.

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

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

Carer Contacts section

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

To add a personal/family contact:

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

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

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

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

- Select the checkboxes as appropriate.

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

Notes section

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

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

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

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

More Information:

[Document, Notes and Assessments section](#) on page 49

Adding a New Note:

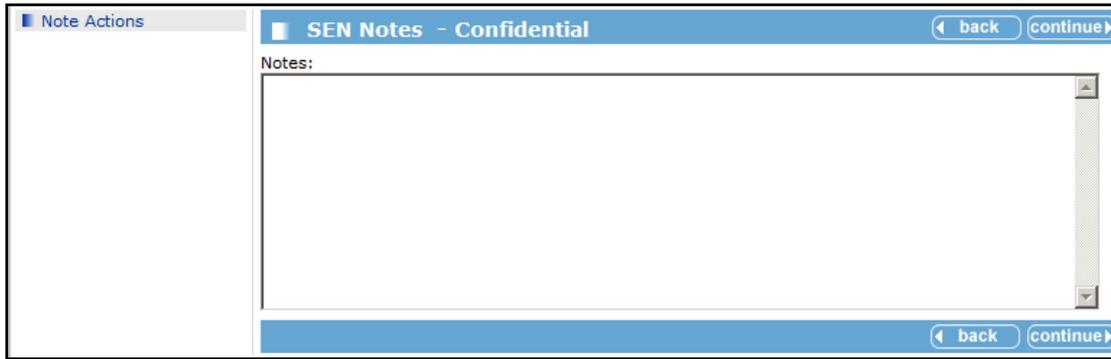
To add a note to a client record:

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

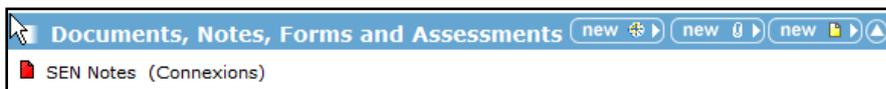
- Select the required note (if a note of this type already exists it is opened automatically).

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

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



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



Viewing and Change a Note

To change a note on a client record:

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



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

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

Professional Contacts and Involvements section

Adding a Lead Worker or Additional Worker

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

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

The Client Record

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

The screenshot shows the 'Change Professional Contacts' dialog. At the top, it says 'client' and 'my homepage | clients | providers | opportunities | ys activities | log out'. Below that, it says 'my homepage > client > update client' and 'Service: Connexions System ID:'. The main section is titled 'Change Professional Contacts' and has 'back' and 'continue' buttons. It shows 'Lead Worker: IYSS User 1' and 'Caseload Type: Active'. There are links for 'change lead worker' and 'remove lead worker'. Below that is 'Additional Workers' with a link 'add new additional worker'. Then 'Lead Professional:' with radio buttons for 'None', 'IYSS User 1', and 'Mr [redacted] - Social Worker'. The 'Agency Links and Referrals' section has a table with columns 'Delete', 'Active', 'From - To', 'Referral', 'Name', 'Agency', and 'Ind Circs'. One row is visible with '26/04/2010 -', 'Mr [redacted] - Social Worker', 'Social Services Central', and 'Family Problems'. There are links for 'link to an agency' and 'link to agency with referral form'. At the bottom, there are 'back' and 'continue' buttons.

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

The screenshot shows the 'Change Lead Worker' dialog. It says 'client' and 'my homepage | clients | providers | opportunities | ys activities | log out'. Below that, it says 'my homepage > client > update client' and 'Service: Connexions System ID:'. The main section is titled 'Change Lead Worker' and has 'back' and 'continue' buttons. It says 'Enter the name of the lead worker and click search for results.' There is a text input field and a 'search' button. Below that is a table with columns 'Name', 'Role', 'Team', and 'Centre'. Three rows are visible, all with 'Personal Adviser' roles and 'Workgroup 1' teams. The first row has 'IYSS Youth Worker' and 'Centre 1'. The second and third rows have redacted names and 'Centre 1'. Below the table, it says 'If the adviser you require is not in the list, enter a new name and search again'. At the bottom, there are 'back' and 'continue' buttons.

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

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

Adding a Lead Professional

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

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

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

Viewing One Involvements

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

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

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

Professional Contacts and Involvements

Lead Worker is IYSS User 1 (Active)
 Allocated on 17/01/2012
 (No Contact Information Available)

Last 2 Lead Workers:
 IYSS User 1 from 17/01/2012 to 17/01/2012 (No Contact Information Available)

Lead Professional is Not Selected

Involvements

Involvement Form	Status	Start Date	End Date	Service Team	Case No	Case Status
Generic CSS Involvement Case Workers: [redacted]		12/09/2011		Support Education Team	[redacted]	

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

Professional Contacts and Involvements

Lead Worker is IYSS User 1 (Active)
 Allocated on 17/01/2012
 (No Contact Information Available)

Last 2 Lead Workers:
 IYSS User 1 from 17/01/2012 to 17/01/2012 (No Contact Information Available)

Lead Professional is Not Selected

Involvements

Involvement Form	Status	Start Date	End Date	Service Team	Case No	Case Status
Generic CSS Involvement Case Workers: [redacted]	Active	12/09/2011		Support Education Team	[redacted]	

Agencies and Referrals

This procedure shows how to:

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

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

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

client my homepage | clients | providers | opportunities | ys activities log out

my homepage > client > update client

System ID: [redacted]

Change Individual Circumstances [back] [continue]

Level of Need

Supported
 Intensive Support
 Minimum Intervention
 Not Determined

Level of Need is up to date
 Use standard caseload points
 Override caseload points: []

Current Individual Circumstances

[add new individual circumstances](#)
[link to an agency](#)
[link to agency with referral form](#)

Personal Notes

Enter additional notes below:

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

The Client Record

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

client my homepage | clients | providers | opportunities | ys activities log out

my homepage > client > update client

System ID: [redacted]

Link Client to Agency (Step 2 of 3)

Linking the client because: Attends Spec Ed Provision, Looked After/In Care, Traveller / Gypsy

Search for the agency to refer the client to.
Enter the agency name and/or an agency type, then click search to view results.

Agency Search:

Agency Name:

Agency Type:

All

Advice Agencies Child Mental Health Connexions/Careers

Council/LSC Establishments Drug Abuse Ed Welfare/Truants

Employer/Training Provider/Recruitment Agencies Health/Teenage Pregnancy Housing/Homeless

Jobcentre/Soc Security Parents/Carers Police/Probation/YOT

Primary Schools Schools/Colleges/Educational Services Social Ed/Comm Care

Social Services/Care Sure Start Plus Voluntary Services

Youth Services

Results from agency search, please select and continue

Name	Post Town	Agency Type
<input type="radio"/> [redacted]	Bedford	Advice Agencies
<input checked="" type="radio"/> Social Services/Care	Simshire	Social Services/Care
<input type="radio"/> [redacted]	Bedford	Connexions/Careers

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

client my homepage | clients | providers | opportunities | ys activities log out

my homepage > client > update client

System ID: [redacted]

Link Client to Agency (Step 3 of 3)

Linking the client to: Social Services/Care - Simshire

Linking the client because: Attends Spec Ed Provision, Looked After/In Care, Traveller / Gypsy

Select the agency point of contact to refer the client to and click continue.
If the agency point of contact you require is not in the list, select New Contact and click continue.

Agency Point of Contact:

New Contact

Mr [redacted]

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

Document, Notes and Assessments section

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

Adding a new Document

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

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

Changing an existing Document:

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

The Client Record

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

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

Importing a Document

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

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

Viewing an Imported Document

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

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

client my homepage | clients | providers | opportunities | ys activities log out

my homepage > client Service: Connexions System ID: 8892029

Example linked document back continue

The options for an imported document are explained below.
Select the option you require and click on 'continue'.

View Document This option will allow you to view the document provided you have the appropriate software. When you click on 'continue' you may be shown a dialog box with a number of options. Use the 'open' option to view the document.

Change Document This option will download the document onto your computer so that it can be changed. You will need the appropriate software on your computer to be able to change the document. When you have finished changing the document return to this page and use the replace option to re-import the updated document.
When you click on 'continue' you will be shown a dialog box with a number of options. Use the 'save' option to specify where the document should be saved.

Replace Document Use this option to re-import a document that has been changed. Importing a document will take a copy of the file you select. The file will not be removed from the computer you are working on. Select the file to import by clicking on the Browse... button. Only files of type Word (.doc, .docx), Excel (.xls, .xlsx), PDF (.pdf) and Image (.jpg, .gif, .png) can be imported.
Document Title: Example linked document Confidential
Import File: Browse...

Delete Document This option will remove the document from the record.

back continue

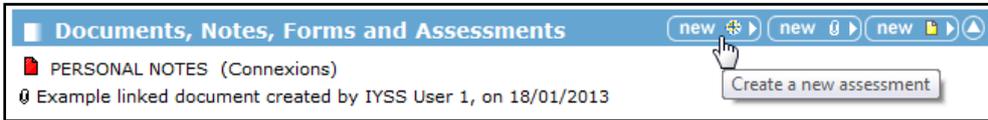
2. Select the option you want and follow the instructions on the dialog depending on whether you want to view, change, replace or delete the document.

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

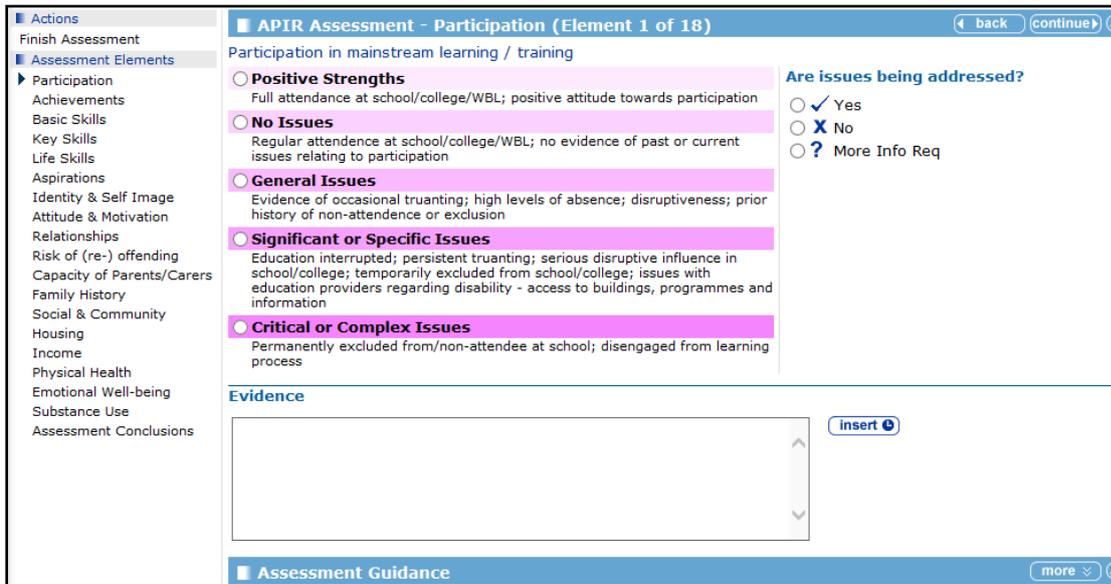
Adding an APIR to a Client Record

To add an APIR to a client record:

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



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



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

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



4. For each element you need to complete:

■ **Level**

<input type="radio"/> Positive Strengths	Full attendance at school/college/WBL; positive attitude towards participation
<input type="radio"/> No Issues	Regular attendance at school/college/WBL; no evidence of past or current issues relating to participation
<input type="radio"/> General Issues	Evidence of occasional truanting; high levels of absence; disruptiveness; prior history of non-attendance or exclusion
<input type="radio"/> Significant or Specific Issues	Education interrupted; persistent truanting; serious disruptive influence in school/college; temporarily excluded from school/college; issues with education providers regarding disability - access to buildings, programmes and information
<input type="radio"/> Critical or Complex Issues	Permanently excluded from/non-attende at school; disengaged from learning process

■ **Are Issues Being Addressed**

Are issues being addressed?

Yes

No

More Info Req

■ Any relevant notes.

■ To view the **Assessment Guidance** notes, click the **more** button.

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

Actions

View Summary

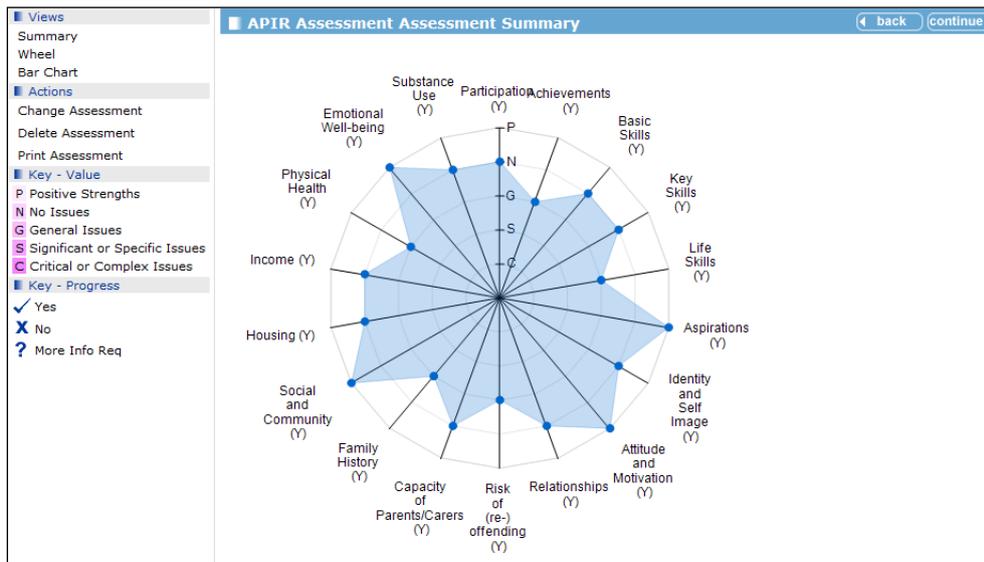
Finish Assessment

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

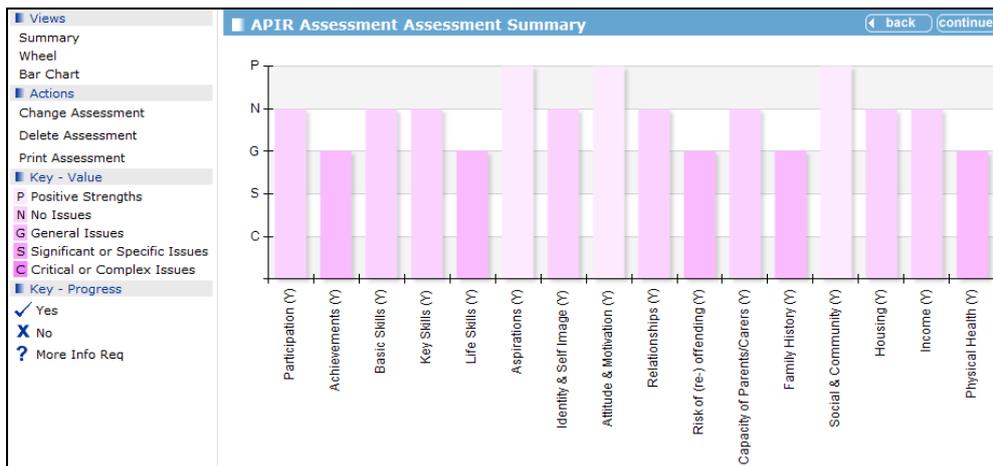
<p>Views</p> <p>Summary</p> <p>Wheel</p> <p>Bar Chart</p> <p>Actions</p> <p>Change Assessment</p> <p>Delete Assessment</p> <p>Print Assessment</p> <p>Key - Value</p> <p>P Positive Strengths</p> <p>N No Issues</p> <p>G General Issues</p> <p>S Significant or Specific Issues</p> <p>C Critical or Complex Issues</p> <p>Key - Progress</p> <p>✓ Yes</p> <p>X No</p> <p>? More Info Req</p>	<p style="text-align: right;">back continue</p> <p>APIR Assessment Assessment Summary</p> <table style="width: 100%;"> <tr> <td>✓ N Participation</td> <td>✓ G Risk of (re-) offending</td> </tr> <tr> <td>✓ G Achievements</td> <td>✓ N Capacity of Parents/Carers</td> </tr> <tr> <td>✓ N Basic Skills</td> <td>✓ G Family History</td> </tr> <tr> <td>✓ N Key Skills</td> <td>✓ P Social & Community</td> </tr> <tr> <td>✓ G Life Skills</td> <td>✓ N Housing</td> </tr> <tr> <td>✓ P Aspirations</td> <td>✓ N Income</td> </tr> <tr> <td>✓ N Identity & Self Image</td> <td>✓ G Physical Health</td> </tr> <tr> <td>✓ P Attitude & Motivation</td> <td>✓ P Emotional Well-being</td> </tr> <tr> <td>✓ N Relationships</td> <td>✓ N Substance Use</td> </tr> </table> <p>Assessment Evidence</p> <p>Key Skills:</p> <p>By IYSS Administrator</p> <p>Physical Health:</p> <p>By IYSS Administrator</p> <p>Emotional Well-being:</p>	✓ N Participation	✓ G Risk of (re-) offending	✓ G Achievements	✓ N Capacity of Parents/Carers	✓ N Basic Skills	✓ G Family History	✓ N Key Skills	✓ P Social & Community	✓ G Life Skills	✓ N Housing	✓ P Aspirations	✓ N Income	✓ N Identity & Self Image	✓ G Physical Health	✓ P Attitude & Motivation	✓ P Emotional Well-being	✓ N Relationships	✓ N Substance Use
✓ N Participation	✓ G Risk of (re-) offending																		
✓ G Achievements	✓ N Capacity of Parents/Carers																		
✓ N Basic Skills	✓ G Family History																		
✓ N Key Skills	✓ P Social & Community																		
✓ G Life Skills	✓ N Housing																		
✓ P Aspirations	✓ N Income																		
✓ N Identity & Self Image	✓ G Physical Health																		
✓ P Attitude & Motivation	✓ P Emotional Well-being																		
✓ N Relationships	✓ N Substance Use																		

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

Example of the **Wheel** view:



Example of the **Bar Chart** view:



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

Previous Values

28/02/2004 G ✓

Current value recorded by Chris Healey on 28/02/2004

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

Consent to Share Information section

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

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

Changing Consent to Share Information

To change consent on a client record:

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

The screenshot shows a web interface for a client record. At the top, there's a navigation bar with 'client' and 'my homepage | clients | providers | opportunities | ys activities' and a 'log out' button. Below that is a breadcrumb trail: 'my homepage > client search > client search results > client > update client'. A 'System ID: 429' is displayed on the right. The main section is titled 'Change Consent' and includes a 'back' button and a 'continue' button. There are two date pickers: 'Effective From Date' set to 07/05/2014 and 'Review / Expiry Date' set to 07/05/2015. The 'Young person information' section has two radio buttons: 'Allowed to hold all information' (selected) and 'Allowed to hold basic information only'. The 'Contact with young person' section has two radio buttons: 'Allowed to contact this young person' (selected) and 'Do not contact this young person'. The 'Information Sharing' section has a checked checkbox. Below it, there's a text prompt: 'If information sharing is required for this young person then tick the box and complete the following section.' There are two radio buttons: 'Permission granted (consent form signed)' (selected) and 'Permission withheld'. Below that, there are two radio buttons: 'Share information with all agencies' (selected) and 'Share information with selected agencies:'. Under the second radio button, there are three checkboxes: 'Advice Agencies', 'Child Mental Health', and 'Connexions/Careers'.

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

NOTE: If **permission withheld** had been recorded, then an alert is displayed on the header bar of the record, as follows

Information sharing is required but permission has not been granted.

Qualifications and Attainments section

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

Adding Qualifications

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

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

- Select the **Subjects** and click the **continue** button to display the **Change Qualifications** dialog. The new qualifications are displayed in the **Qualifications** section where you can update the **Actual** or **Forecast** grades, if necessary.

client my homepage | clients | providers | opportunities | ys activities log out

my homepage > client > update client System ID: 429

Change Qualifications back continue

Actual Qualification Level: NVQ2 or Equivalent Potential Qualification Level: (none)

Skills In

Numeracy Literacy ICT
 Problem Solving Working Together Self Development
 Communication

Qualifications

To add a new **diploma(s)**, select a level, Progression Diploma and click **new**

To add a new **qualification**, select a level, GCSE(s) and click **new**

Delete Date	Subject	Examination Board	Actual	Forecast
<input type="checkbox"/> December 2012	GCSE(s) English	OCR OXFORD CAMB RSA	C	C
<input type="checkbox"/> December 2012	GCSE(s) Mathematics	OCR OXFORD CAMB RSA	C	C
<input type="checkbox"/> December 2012	GCSE(s) Science	OCR OXFORD CAMB RSA	C	C

Qualification Notes

back continue

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

Aspirations section

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

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

Updating Aspirations

To update aspirations and add an employment aspiration:

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

client my homepage | clients | providers | opportunities | ys activities log out

my homepage > client > update client Service: Connexions System ID: 8902253

Jane [redacted]

Change Aspirations back continue

Goal

To update the client's current goal enter details here:

Aspirations

To add a new aspiration, select the type

Employment/Training Further Education Higher Education

Work Experience

and click [new](#)

Delete	Aspirations	Date	Current	Priority
<input type="checkbox"/>	Employment/Training - Agriculture and Animal Care / Agriculture	02/05/2014	<input checked="" type="checkbox"/>	1

Aspirations Checked

Aspiration Notes

Desired Locations

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

client my homepage | clients | providers | opportunities | ys activities log out

my homepage > client > update client Service: Connexions System ID: 8902253

Jane [redacted]

New Employment/Training Aspiration back continue

Group

Agriculture and Animal Care Catering/Hospitality Childcare/Nursery Nursing

Construction Culture/Media/Sports Delivery Services

Electrical/Electronic Engineering Entry2Employment E2E

Hairdressing/Beauty Health/Caring/Ambulance Work Managers and Professional Jobs

Manufacturing/General Laboratory Work Engineering Engineering Trades Miscellaneous/Not Known

Office/Finance Protective Service Retail/Sales

Science Skilled/Personal Services Textile/Garment

Transport/Vehicle Unskilled Work

Sub Group

Engineering Craft Engineering Technician Tech Drawing/CAD

back continue

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

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

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

Benefits and Allowances section

Adding a Client’s Benefits and Allowances

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

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

The screenshot shows the 'Change Benefits and Allowances' dialog box. At the top, there is a breadcrumb trail: 'my homepage > client > update client'. Below this, there is a 'System ID:' field. The main heading is 'Change Benefits and Allowances' with 'back' and 'continue' buttons. There are two rows of date pickers: 'Registered For Work:' and 'Registered For Training:', each with 'From' and 'To' columns. Below this is a table with columns: 'Delete', 'Claim Date', 'Benefit Type', 'Status', and 'Dates'. There is a link 'add new benefit / allowance'. At the bottom, there is a 'Benefit Notes' section with a text area and the prompt 'Enter additional notes below:'.

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

The screenshot shows the 'Add Benefit or Allowance' dialog box. At the top, there is a breadcrumb trail: 'my homepage > client > update client'. Below this, there is a 'System ID: 429'. The main heading is 'Add Benefit or Allowance' with 'back' and 'continue' buttons. There are three rows of date pickers: 'Claim Start Date*', 'Benefit / Allowance Start Date:', and 'Claim End Date:'. Below this is a 'Benefit Type*' section with radio buttons for: 'Bridging Allowance', 'EMA - Education Maintenance Allowance', 'Extended Child Benefit', 'Incapacity Benefit', 'Income Support', 'Job Seeker Allowance', 'SDA - Disability', 'Severe Hardship', and 'Working Family Credit'. Below that is a 'Claim Status*' section with radio buttons for: 'Pending', 'Rejected', 'Successful', and 'Terminated'. At the bottom, there are 'back' and 'continue' buttons.

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

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

Submitting an Opportunity

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

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

The screenshot shows a web interface for a client record. The main heading is 'client' with navigation links: my homepage | clients | providers | opportunities | ys activities | log out. Below this is a breadcrumb trail: my homepage > client > update client. The 'New Submission' dialog is open, featuring a search bar with a 'search' button and a 'continue' button. The dialog includes the following sections:

- Opportunity ID:** A text input field.
- Opportunity Status:** Radio buttons for All, Cancelled, Inactive, Suspended, Filled, Live (selected), Future, and Private.
- Opportunity Type:** Checkboxes for Further Education, Vacancy (checked), and Training (checked).
- Geographical Area:** Checkboxes for Area 1 and Area 2.

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

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

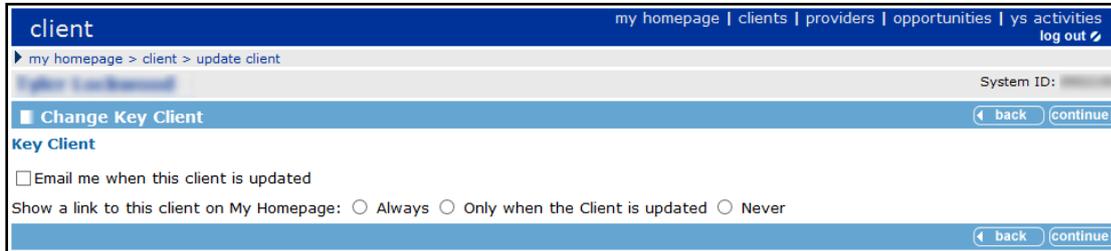
When you return to the client dialog the submissions are displayed as activities completed and also displayed on the **Opportunity Submissions** section.

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

Creating a Key Client

To create a key client:

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



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

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

Removing Key Client status from a client record

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

Bookmarking Clients

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

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



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

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

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

- If required, repeat this with other clients.

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

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

Special Alert

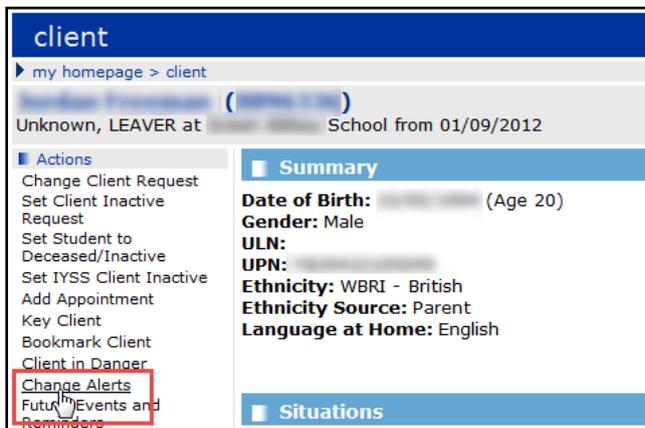
A special alert identifies important information to be aware when working with a particular client, for example, to highlight staff health and safety issues.

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

Adding a Special Alert

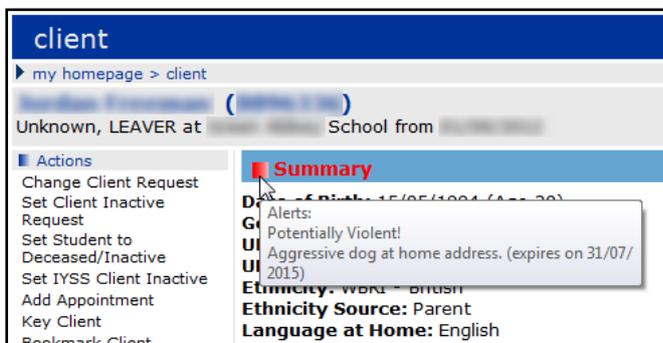
To add a special alert to a client's record:

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



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

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



Removing a Special Alert

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

The Client Record

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

SMS and Email Messages

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

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

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

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

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

Sending a Message

To send a message to a client:

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

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

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

! 1 message waiting to be sent

05 / Providers and Opportunities

Searching and Viewing Providers

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

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

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

NOTES: *If the search criteria are too broad and the maximum number of records is exceeded, you will see the following message – ‘Your search has exceeded the maximum allowed records returned (250 records). Please refine your search and retry. You can however, use a report to view the records returned from this search.’*

*If there are a large number of search results, use the **next** and **previous** buttons to move through the additional pages.*

Providers and Opportunities

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

provider my homepage | clients | providers | opportunities | ys activities log out

my homepage > providers search > opportunities and providers search results > provider

Training System ID: 7

Employer/Training Provider within the Across All Areas area

Summary [change](#)

Type: Employer/Training Provider
Status: Live
Nature of Business:
Managing Team: Workgroup 1

Bedford, MK44
0112 123321

No Contacts [change](#)

Live Opportunities

Title	System ID	Type	Geog Area	Status	Risk Category	Next Visit
Mechanics	18	Training	Across All Areas	Live		
Administration	19	Training	Across All Areas	Live		

All Opportunities [more](#)

No Interactions [new](#)

No Details [change](#)

No EBP [change](#)

Employed Clients [more](#) [change](#)

No Documents or Notes [new](#) [new](#)

Provider LMI [more](#) [change](#)

No Health and Safety Details [change](#)

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

Searching and Viewing Opportunities

To search for and view opportunities.

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

opportunities my homepage | clients | providers | opportunities | ys activities log out

my homepage > opportunities search

Opportunity Search [search](#)

Opportunity Title:

Opportunities for Provider [select](#)

System ID

Opportunity Status

All
 Cancelled
 Inactive
 Suspended

Filled
 Live
 Future
 Private

Opportunity Type

Further Education
 Personal Development
 Vacancy

Higher Education
 Statutory Education
 Work Experience

IAG Project
 Training

Occupational Groups / Sub Groups [select](#)

General [more](#)

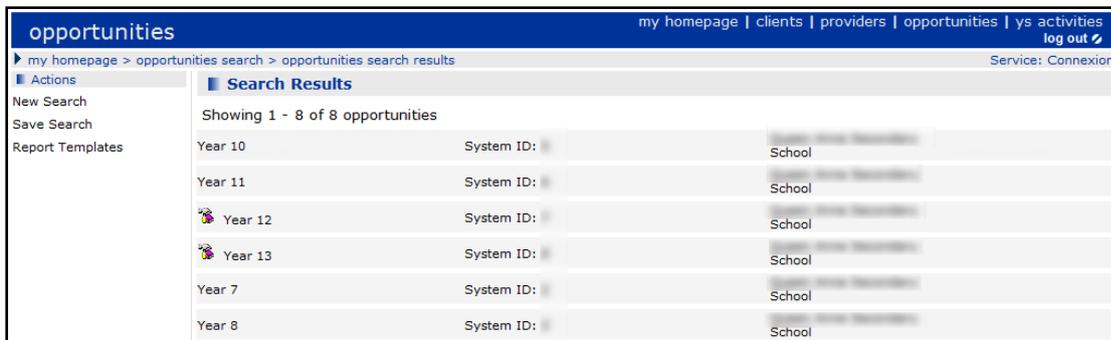
Location [more](#)

Client Related [more](#)

[search](#)

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

- a. **Opportunity Title:** Enter part or all of the opportunity name,
 - b. **Opportunities for Provider:** To narrow the opportunity search to a particular provider:
 - i. Click the **select** button to display the **Search Opportunities - Select Provider** dialog.
 - ii. Enter part or all of the provider's name, then click the **search** button to display the search results.
 - iii. Select the required provider, then click the **continue** button to return to the **Opportunity Search** dialog.
 - c. **System ID:** Enter an opportunity ID,
 - d. **Opportunity Status:** Select a radio button,
 - e. **Opportunity Type:** Select one or more checkboxes.
3. If required, enter search criteria in the other panels, i.e. **General, Location** and **Client Related**.
 4. Click the **search** button to display the **Search Results** dialog.



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

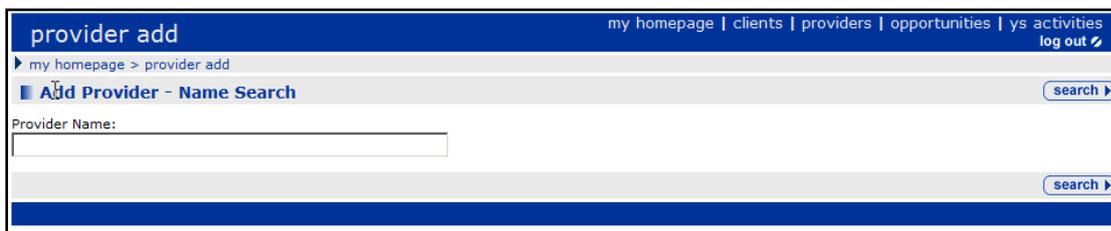
5. To view opportunity details, click the opportunity name to display the **Opportunity Summary** dialog.

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

Adding a Provider

To add a provider:

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



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

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

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

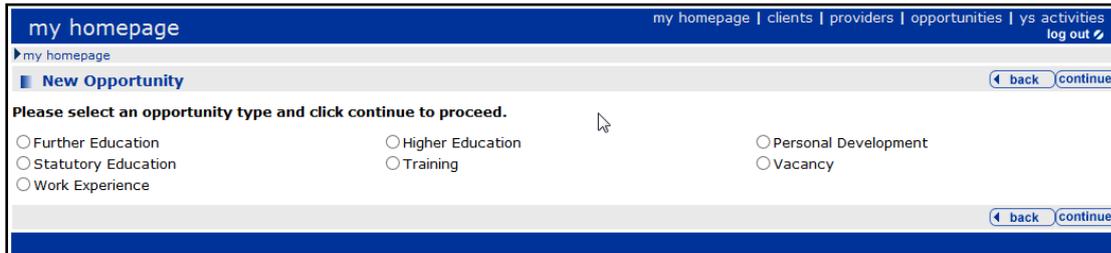
Providers and Opportunities

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

Adding a Vacancy Opportunity

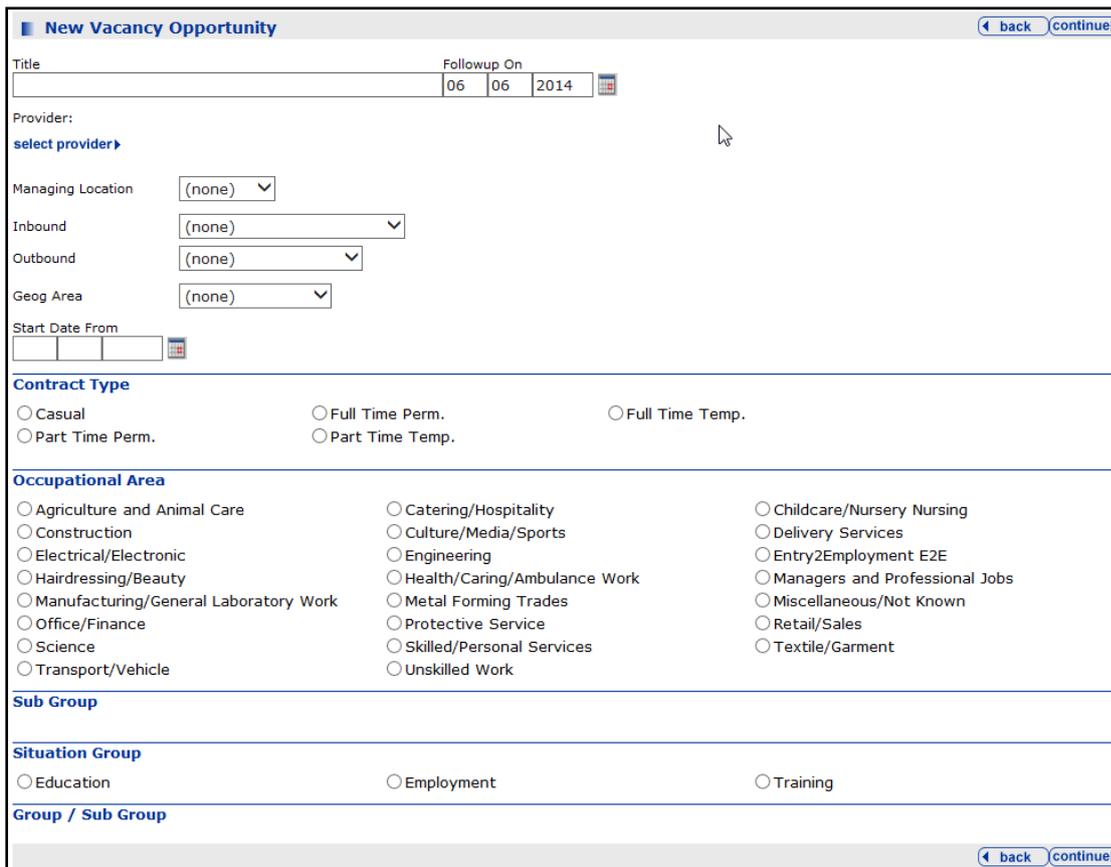
To add a vacancy opportunity:

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



The screenshot shows the 'New Opportunity' dialog box. At the top, there is a navigation bar with 'my homepage' and links for 'clients', 'providers', 'opportunities', and 'ys activities'. Below the navigation bar, the title 'New Opportunity' is displayed with 'back' and 'continue' buttons. The main content area contains the instruction 'Please select an opportunity type and click continue to proceed.' followed by six radio button options: 'Further Education', 'Statutory Education', 'Work Experience', 'Higher Education', 'Training', 'Personal Development', and 'Vacancy'. At the bottom, there are 'back' and 'continue' buttons.

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



The screenshot shows the 'New Vacancy Opportunity' dialog box. It features a 'back' and 'continue' button at the top right. The form includes several sections: 'Title' with a text input and 'Followup On' with a date picker set to 06/06/2014; 'Provider:' with a 'select provider' link; 'Managing Location', 'Inbound', 'Outbound', and 'Geog Area' each with a dropdown menu set to '(none)'; 'Start Date From' with a date picker; 'Contract Type' with radio buttons for 'Casual', 'Part Time Perm.', 'Full Time Perm.', and 'Full Time Temp.'; 'Occupational Area' with a grid of radio buttons for various categories like 'Agriculture and Animal Care', 'Catering/Hospitality', 'Childcare/Nursery Nursing', etc.; 'Sub Group' with a text input; 'Situation Group' with radio buttons for 'Education', 'Employment', and 'Training'; and 'Group / Sub Group' with a text input. At the bottom, there are 'back' and 'continue' buttons.

- Enter the details of the new opportunity.

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



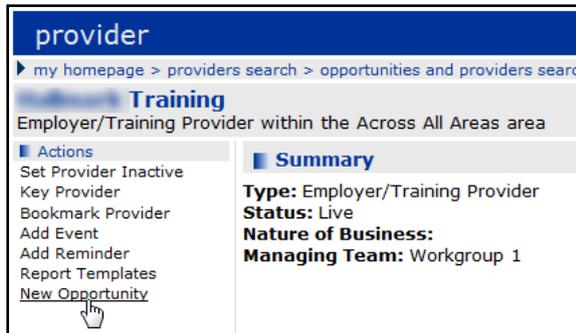
- Search for the provider you want by entering search criteria, then click the **search** button to display the search results.
- Choose a provider from the displayed list on the **New Vacancy Opportunity – Add Provider** dialog.
- Click the **continue** button to return to the **New Vacancy Opportunity**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



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

More ways to add an Opportunity

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



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

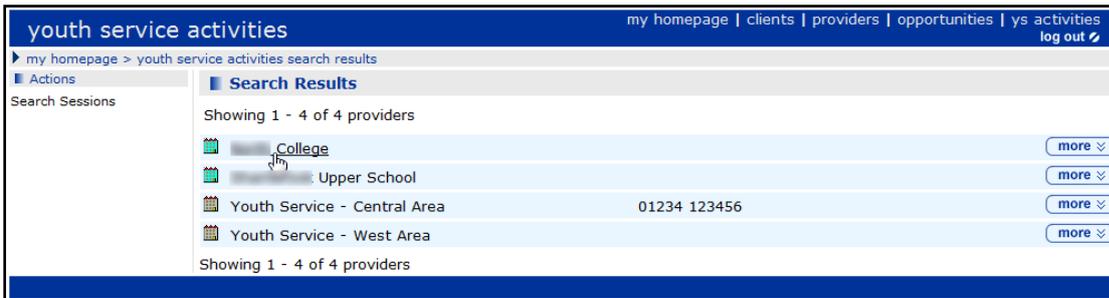


06 / Youth Service (YS) Sessions

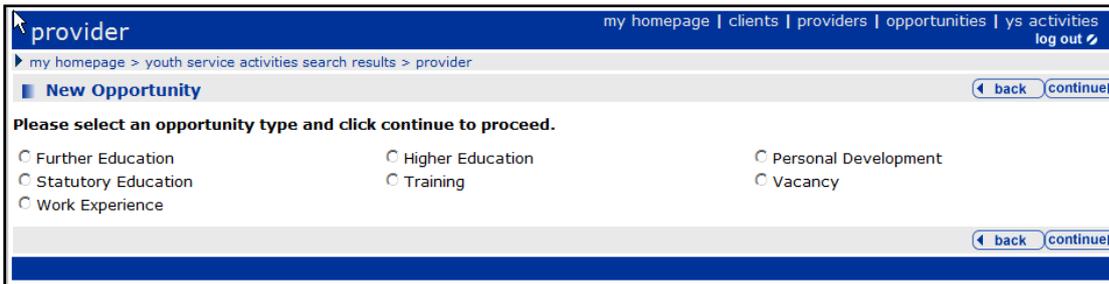
Adding a YS Activity

To add a youth service (YS) activity:

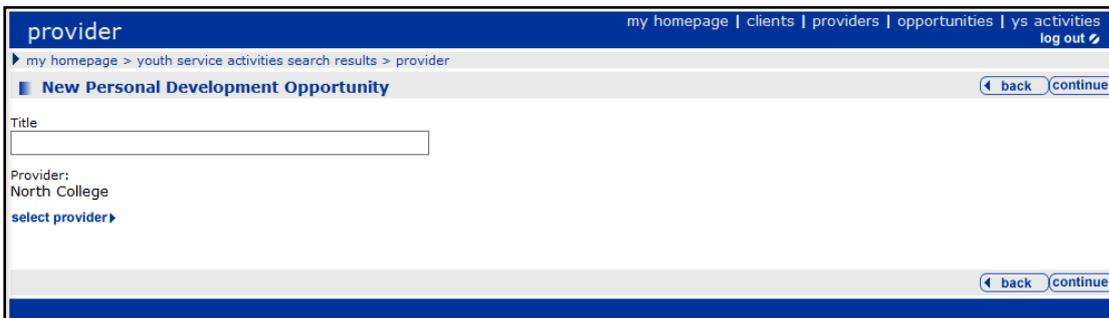
1. On **My Homepage**, click the **ys activities** link to display the **Search Results** dialog.



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



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



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

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

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

Youth Service (YS) Sessions

- Complete any other required fields.

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

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

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



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

Adding Sessions to an Activity

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

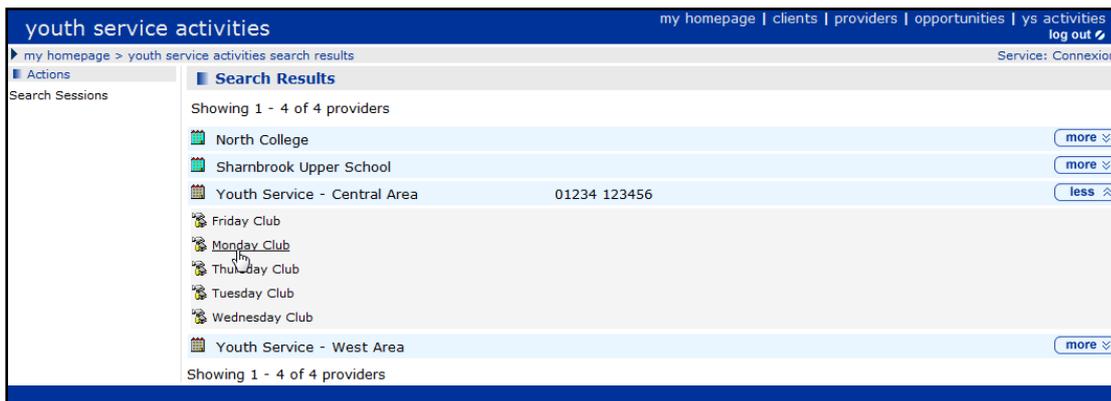
- Part 1 – Opening a new Session
- Part 2 – Entering Curriculum details
- Part 3 – Changing Client Attendees
- Part 4 – Adding a Session Evaluation

Part 1 – Opening a new Session

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

[my homepage](#) | [clients](#) | [providers](#) | [opportunities](#) | [ys activities](#)

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



3. Select an **Activity**.

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

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

Selecting the staff who will attend the session:

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

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

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

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

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

session my homepage | clients | providers | opportunities | ys activities log out

my homepage > youth service activities search results > opportunity > session Service: Connexions System ID: 10

Monday Club - Personal Development
Youth Service - Central Area

Summary [change]

Date: 08/05/2014 12:00-13:00 (01:00) Afternoon Session [x] The Village Hall - Brambleton

Duration Days: 1

Staff Attending:
 [x] YS Person 1
 [x] YS Person 3

Recorded by IYSS Administrator, Workgroup 1 on 08/05/2014 at 12:59
 No Contact Information Available

No Curriculum, Activities and Issues [change]

Attendees [more] [change]

	Below 11		11-12		13-19		20+		Total
	M	F	M	F	M	F	M	F	
New Attendees									0
Previous Attendees									0
Total Attendees	0								

No Evaluation [change]

Part 2 – Entering Curriculum details

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

session my homepage | clients | providers | opportunities | ys activities log out

my homepage > youth service activities search results > opportunity > session > update session Service: Connexions System ID: 10

Monday Club

Change Curriculum, Activities and Issues [back] [continue]

Curriculum

Add/Change Curriculum Details [select]

Activities

<input type="checkbox"/> Transition Work	<input type="checkbox"/> Residential	<input type="checkbox"/> Training Course
<input type="checkbox"/> PSHE	<input type="checkbox"/> Individual Support	<input type="checkbox"/> Counselling & Info
<input type="checkbox"/> Project Work	<input type="checkbox"/> Drop In	<input type="checkbox"/> Social Ed Programme
<input type="checkbox"/> Peer Education	<input type="checkbox"/> Other	<input type="checkbox"/> Youthoria Website Group
<input type="checkbox"/> Accreditation Work	<input type="checkbox"/> Advocacy	<input type="checkbox"/> Mentoring
<input type="checkbox"/> Sports	<input type="checkbox"/> Arts	<input type="checkbox"/> Information

Challenging Discrimination and Prejudice

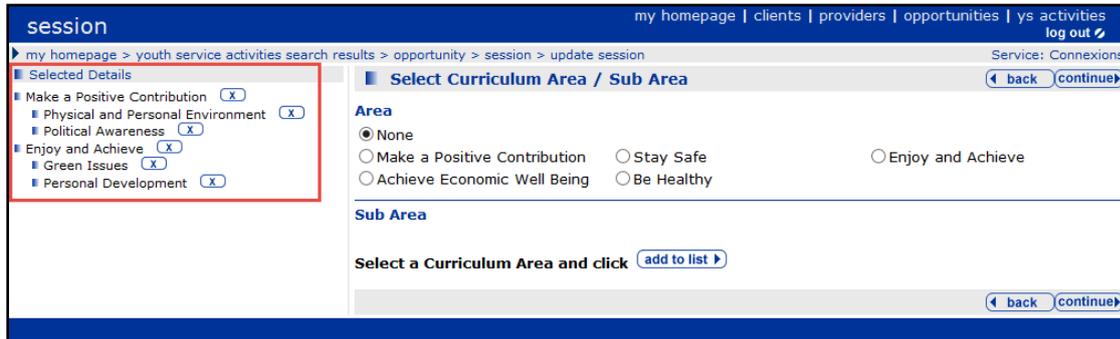
Age Gender Race

Other relevant information
 Enter notes below:

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

Youth Service (YS) Sessions

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

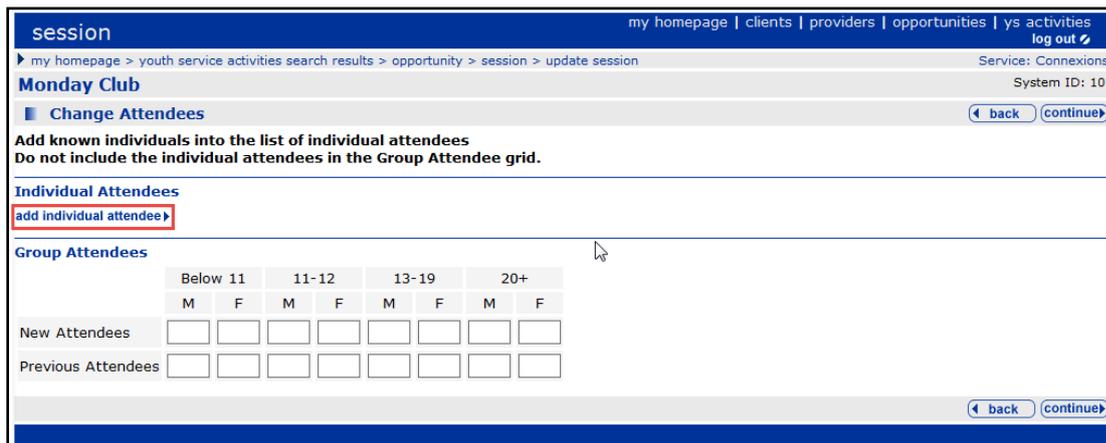


- When the details are correct, click the **continue** button to display the **Summary** dialog. The **Curriculum, Activities and Issues** are now updated.

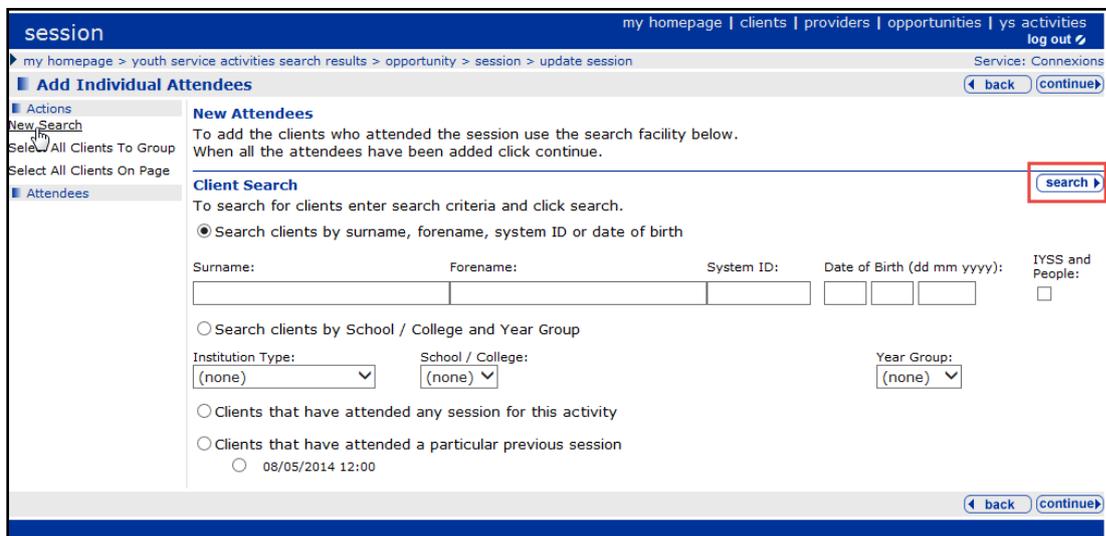
Part 3 – Changing Client Attendees

To make changes to the attendees:

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



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



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

session my homepage | clients | providers | opportunities | ys activities log out

my homepage > youth service activities search results > provider > opportunity > session > update session

Add Individual Attendees back continue

Actions
New Search
Select All Clients To Group
Select All Clients On Page

Attendees

New Attendees
To add the clients who attended the session use the search facility below.
When all the attendees have been added click continue.

Client Search search

To search for clients enter search criteria and click search.

Search clients by surname, forename, system ID or date of birth

Surname: Forename: System ID: Date of Birth (dd mm yyyy): IYSS and People:

Search clients by School / College and Year Group

Institution Type: (none) School / College: (none) Year Group: (none)

Clients that have attended any session for this activity

Clients that have attended a particular previous session

19/04/2010 18:00

Search Results 5 client(s) found, showing 1 - 5 of 5

To select the client tick the box of each client name required then click add attendees.
To search again for additional clients click New Search to clear criteria.

add attendees

Name	Date of Birth, Age	Address
<input type="checkbox"/> L	(Age 20)	No Correspondence Address
<input type="checkbox"/> M	(Age 19)	No Correspondence Address
<input type="checkbox"/> M	(Age 20)	No Correspondence Address
<input type="checkbox"/> K	(Age 20)	No Correspondence Address
<input type="checkbox"/> J	(Age 20)	No Correspondence Address

add attendees

5 client(s) found, showing 1 - 5 of 5

back continue

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

session my homepage | clients | providers | opportunities | ys activities log out

my homepage > youth service activities search results > provider > opportunity > session > update session

Add Individual Attendees back continue

Actions
New Search
Select All Clients To Group
Select All Clients On Page

Attendees

New Attendees
To add the clients who attended the session use the search facility below.
When all the attendees have been added click continue.

Client Search search

To search for clients enter search criteria and click search.

Search clients by surname, forename, system ID or date of birth

Surname: Forename: System ID: Date of Birth (dd mm yyyy): IYSS and People:

Search clients by School / College and Year Group

Institution Type: (none) School / College: (none) Year Group: (none)

Clients that have attended any session for this activity

Clients that have attended a particular previous session

19/04/2010 18:00

back continue

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

Youth Service (YS) Sessions

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

session my homepage | clients | providers | opportunities | ys activities log out

my homepage > youth service activities search results > opportunity > session > update session Service: Connexions System ID: 10

Monday Club back continue

Change Attendees

Add known individuals into the list of individual attendees
Do not include the individual attendees in the Group Attendee grid.

Individual Attendees

Delete	Attended	Participant	New	Name
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[blurred]
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[blurred]
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[blurred]
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[blurred]
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[blurred]
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[blurred]

add individual attendee >

Group Attendees

	Below 11		11-12		13-19		20+	
	M	F	M	F	M	F	M	F
New Attendees	0	0	0	0	0	0	0	0
Previous Attendees	0	0	0	0	0	0	0	0

back continue

- For any young people attending the session whose names you do not have, you can use the **Group Attendees** section under the relevant gender and age headings.
- Click the **continue** button to display the **Session** dialog. The summary of attendees is updated and shows individuals and the total numbers of attendees.
- To expand the section and show more detail of the attendees, use the **more** button in the **Attendees** section. New and participant attendees are identified by the ♦ symbol.

Attendees less change

Attendee Summary:

	Below 11		11-12		13-19		20+		Total
	M	F	M	F	M	F	M	F	
New Attendees	0	0	0	0	0	0	0	2	2
Previous Attendees	0	0	0	0	1	1	0	2	4
Total Attendees	0	0	0	0	1	1	0	4	6

Individual Attendee Details:

Attended	Participant	New	Name
♦	♦		[blurred] (25/04/1994)
♦		♦	[blurred] (02/02/1994)
♦	♦		[blurred] (04/08/1994)
♦		♦	[blurred] (12/05/1992)
♦		♦	[blurred] /05/1992)
♦		♦	[blurred] (20/08/1994)

new achievement >

Group Attendee Details:

	Below 11		11-12		13-19		20+		Total
	M	F	M	F	M	F	M	F	
New Attendees	0	0	0	0	0	0	0	0	0
Previous Attendees	0	0	0	0	0	0	0	0	0
Total Attendees	0								

No Evaluation change

Part 4 – Adding a Session Evaluation

To add a session evaluation:

1. Click the **change** button in the **Evaluation** section to display the **Change Evaluation** dialog. There are two main sections:

- **Young Persons Evaluation of Session**
- **Overall Evaluation of Session**

The screenshot shows a web interface for editing a session evaluation. At the top, there's a navigation bar with 'session' and 'my homepage | clients | providers | opportunities | ys activities'. Below that, a breadcrumb trail reads 'my homepage > youth service activities search results > opportunity > session > update session'. The main title is 'Monday Club' with 'System ID: 10' next to it. The 'Change Evaluation' section is highlighted with a red box. It contains two sub-sections: 'Young Persons Evaluation of Session' and 'Overall Evaluation of Session', both also highlighted with red boxes. Each sub-section has six radio button options: 'Very Good', 'Good', 'Adequate', 'Weak', 'Unsatisfactory', and 'Inadequate'. Below these are text areas for 'Evidence for Grade' and 'Enter notes below:'. At the bottom, there's a 'General Observations' section with a 'Enter notes below:' text area. 'back' and 'continue' buttons are located at the top right of the dialog.

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

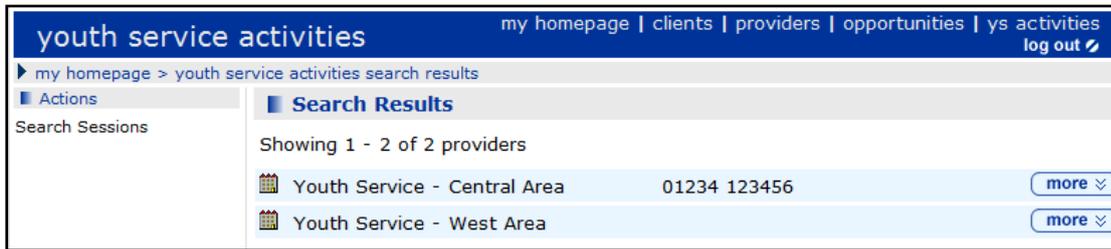
NOTE: If you do not select attendees as participant they are marked as participants after attending 3 or 4 session (as defined by your organisation).

Adding a Detached YS Session

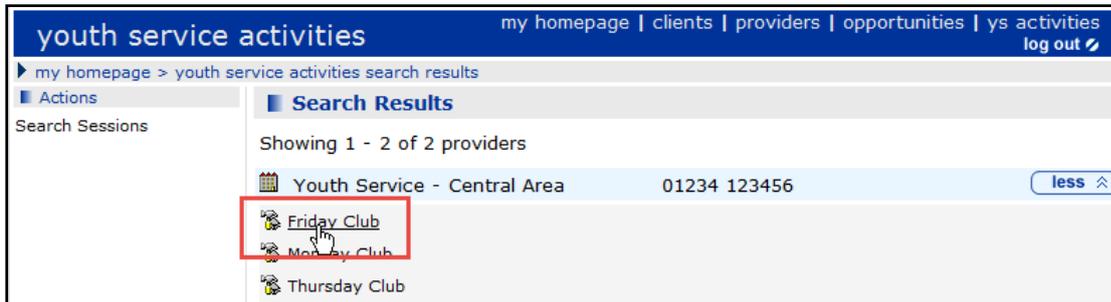
This procedure shows how to add a YS detached session. A detached session is a session that takes place in an outreach situation.

Part 1 – Session detail and attending staff

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



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



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

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

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

Curriculum
 Stay Safe
 Personal Safety
 Add/Change Curriculum Details select ▶

Level of Contact
 Conversation (CC) Acknowledgement (Ack) Neutral (NC)
 Constructive conversation Intervention (Int) Observation (Obs)

Challenging Discrimination and Prejudice
 Age Gender Race

Staff Attending select ▶

Additional Staff:

Action Taken
 Enter notes below:

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

Adding the curriculum details

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

opportunity my homepage | clients | providers | opportunities | ys activities | log out

my homepage > youth service activities search results > opportunity

Selected Details

Select Curriculum Area / Sub Area

Area

None

Make a Positive Contribution

Stay Safe

Enjoy and Achieve

Achieve Economic Well Being

Be Healthy

Sub Area

Select a Curriculum Area and click

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

Select the staff who are attending

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

The screenshot shows a web interface for selecting staff attending an opportunity. The page title is 'opportunity' and it includes navigation links for 'my homepage', 'clients', 'providers', 'opportunities', and 'ys activities'. A breadcrumb trail indicates the current location: 'my homepage > youth service activities search results > opportunity'. The main content area is titled 'Select Staff Attending' and has two tabs: 'By Locality' (selected) and 'All Staff'. Under the 'By Locality' tab, there are radio buttons for 'None', 'Centre 1', 'Centre 2', and 'Centre 3'. Under the 'Staff' section, there are checkboxes for 'YS Person 1' and 'YS Person 2'. An 'add to list' button is located below the staff list. At the bottom of the dialog, there are 'back' and 'continue' buttons.

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

The names of the staff attending are displayed in the left-hand column of the screen under the **Selected Staff** heading. You can remove any staff by clicking the **Remove Activity** button  beside their name.

5. When you finished selecting staff, click the **continue** button to display the **New Session** screen showing details of the new session.

Part 2 – Select/change Contacts

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

detached session my homepage | clients | providers | opportunities | ys activities log out

my homepage > youth service activities search results > opportunity > detached session

Friday Club - Personal Development System ID: 15
Youth Service - Central Area

Actions
Duplicate Session
Shortcuts
Contacts
Notes

Summary [change](#)

Date: 31/05/2015 13:00-15:00 (00:00) All Day Session
Staff Attending:
YS Person 1
YS Person 2

Recorded by 1135 Administrator, Workgroup 1 on 27/05/2014 at 11:26
No Contact Information Available

Curriculum and Level of Contact

Relevance to Curriculum:
Stay Safe
Personal Safety

Challenging Discrimination and Prejudice:
Age

Contacts [more](#) [change](#)

	Below 11		11-12		13-19		20+		Total
	M	F	M	F	M	F	M	F	
New Contacts									0
Previous Contacts									0
Total Contacts	0								

No Notes

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

detached session my homepage | clients | providers | opportunities | ys activities log out

my homepage > youth service activities search results > opportunity > detached session

Friday Club System ID: 15

Change Contacts [back](#) [continue](#)

Add known individuals into the list of individual Contacts
Do not include the individual Contacts in the Group Contact grid.

Individual Contacts
add individual contact

Group Contacts

	Below 11		11-12		13-19		20+	
	M	F	M	F	M	F	M	F
New Contacts	<input type="text"/>							
Previous Contacts	<input type="text"/>							

[back](#) [continue](#)

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

The screenshot shows a web interface for a 'detached session'. The main title is 'Friday Fun Session - Personal Development' under 'Youth Service - West Area'. The page is divided into several sections:

- Summary:** Date: 00:00-00:00 (03:00) All Day Session. Staff Attending: [redacted]. Weather: Fine. Location: Shopping centre. Recorded by IYSS Administrator, Workgroup 1 on [redacted] at 11:14. No Contact Information Available.
- Curriculum and Level of Contact:** Relevance to Curriculum: Stay Safe. Level of Contact: Observation (Obs), Conversation (CC).
- Contacts:** A table showing contact counts by age group and gender.

	Below 11		11-12		13-19		20+		Total
	M	F	M	F	M	F	M	F	
New Contacts	0	0	0	0	0	0	0	0	0
Previous Contacts	0	0	0	0	0	0	0	0	3
Total Contacts	0	3							

Below the table, it says 'No Notes'.

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

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

The screenshot shows the 'detached session' interface. The main heading is 'Add Individual Contacts'. Below it, there's a 'New Contacts' section with instructions. The 'Client Search' section has two radio buttons: 'Search clients by surname, forename, system ID or date of birth' (selected) and 'Search clients by School / College and Year Group'. The search criteria are: Surname: [redacted], Forename: [redacted], System ID: [redacted], Date of Birth (dd mm yyyy): [redacted]. Under the second radio button, Institution Type: (none), School / College: (none), and Year Group: (none). The 'Search Results' section shows '1 client(s) found, showing 1 - 1 of 1'. Below this is a table with columns 'Name', 'Date of Birth, Age', and 'Address'. One row is visible with a red box around the 'add contacts' button in the first column.

- The selected client is added to the **Contacts** list. If your selection is now complete, click the **continue** button.
- The list of attendees is displayed in the **Individual Contacts** section. If they are new members, select the **New** checkbox beside their name.
- In the **Group Contacts** section, enter the new contacts under the relevant gender and age headings.

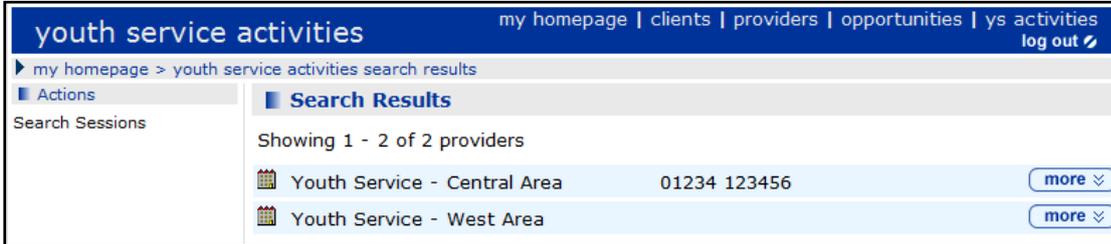
The screenshot shows the 'detached session' interface for 'Friday Club'. The main heading is 'Change Contacts'. Below it, there's a section for 'Individual Contacts' with a table with columns 'Delete', 'New', and 'Name'. Below this is a 'Group Contacts' section with a table for entering new and previous contacts. The table has columns for age groups (Below 11, 11-12, 13-19, 20+) and gender (M, F). The 'New Contacts' row shows values: Below 11 (M: 0, F: 0), 11-12 (M: 0, F: 0), 13-19 (M: 0, F: 5), 20+ (M: 4, F: 0). The 'Previous Contacts' row shows values: Below 11 (M: 0, F: 0), 11-12 (M: 0, F: 0), 13-19 (M: 0, F: 0), 20+ (M: 0, F: 0).

- Click the **continue** button. The table of attendees is updated and shows individuals and the total numbers of attendees.
- To expand the section and show more detail of the attendees, click the **more** button in the **Attendees** section. New attendees are identified by the ♦ symbol.

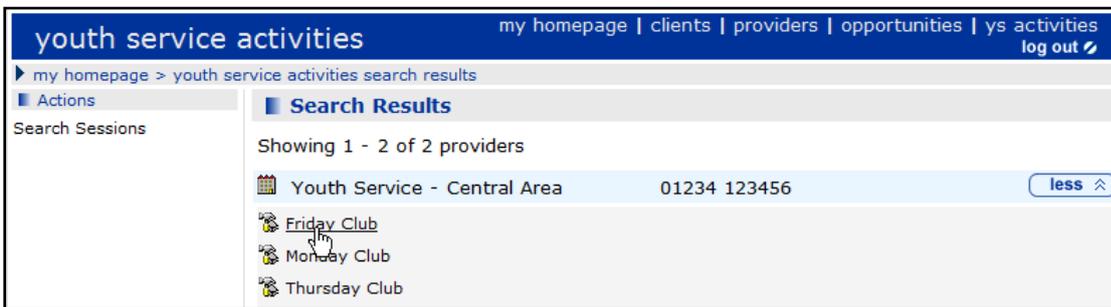
Duplicating a Detached YS Session

To duplicate a YS session:

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



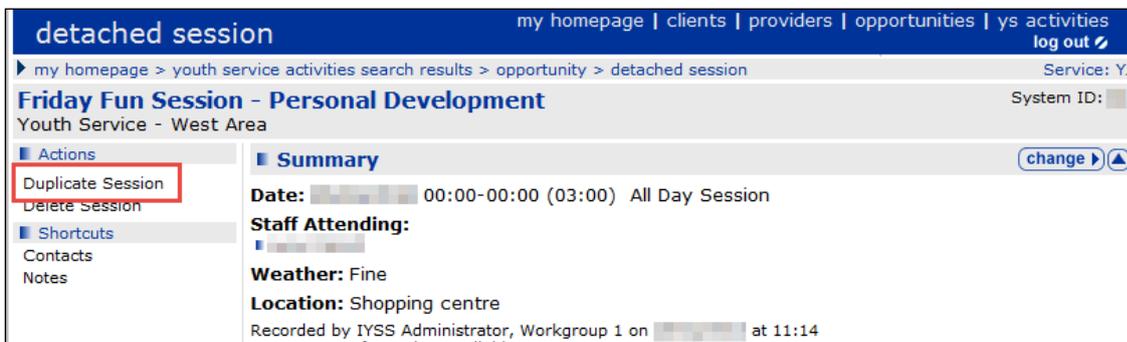
2. Click the **more** button for the provider you want to work with. A list of their activities is displayed.



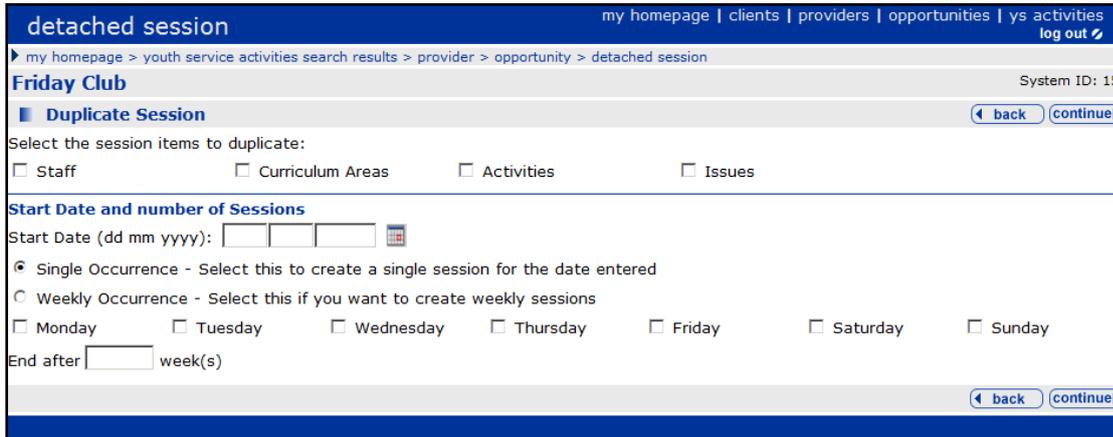
3. Select the required activity to display its details.



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



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



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



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

Deleting a Detached YS Session

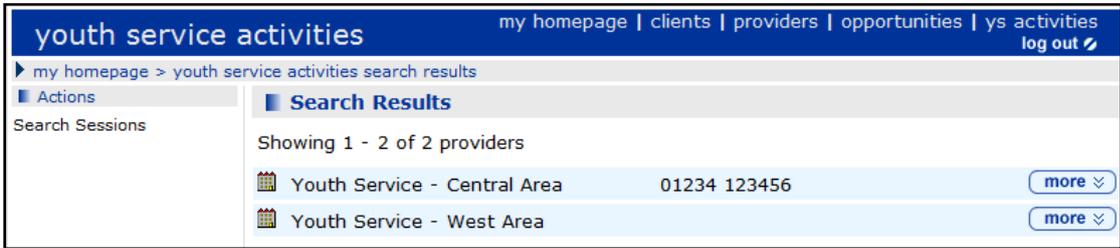
If you have the required permissions, you can delete detached sessions.

To delete a detached session:

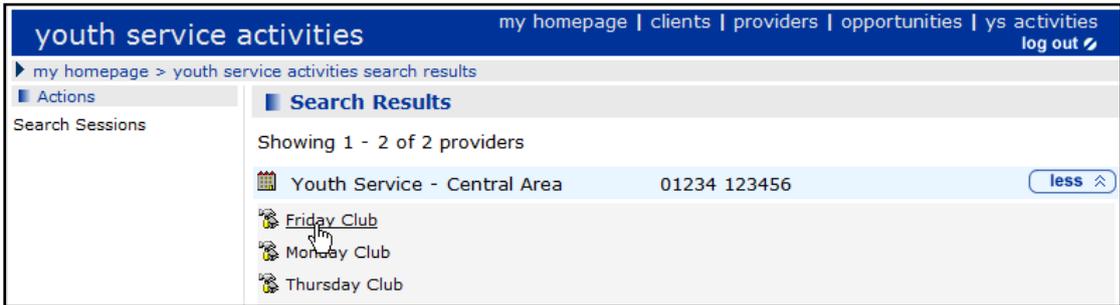
- Log into One IYSS.

Youth Service (YS) Sessions

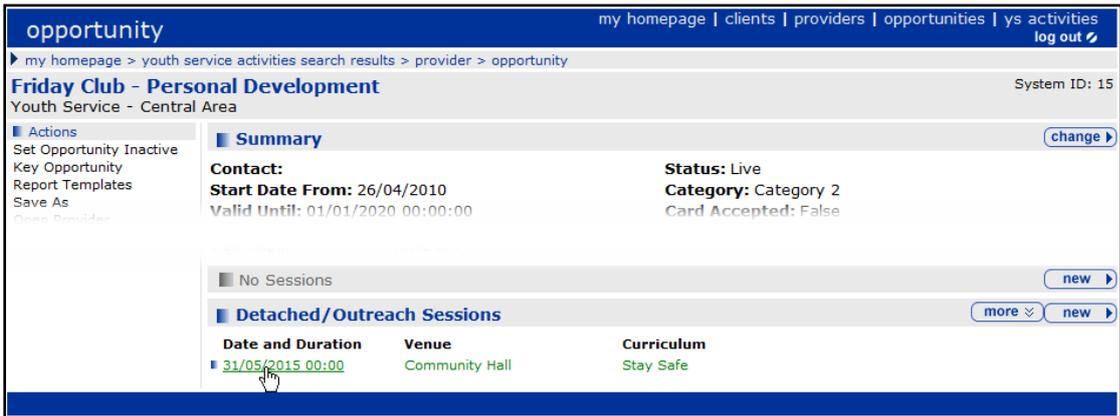
- In the **my homepage** header bar, click the **ys activities** hyperlink to display the **youth service activities** screen.



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



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



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

The screenshot shows a web interface for a 'detached session'. The title is 'Friday Fun Session - Personal Development' under 'Youth Service - West Area'. The interface includes a navigation menu on the left with 'Actions' (Duplicate Session, Delete Session) and 'Shortcuts' (Contacts, Notes). The main content area has sections for 'Summary', 'Curriculum and Level of Contact', and 'Contacts'.

Summary:
Date: 00:00-00:00 (03:00) All Day Session
Staff Attending: [Redacted]
Weather: Fine
Location: Shopping centre
 Recorded by IYSS Administrator, Workgroup 1 on [Redacted] at 11:14
 No Contact Information Available

Curriculum and Level of Contact:
 Relevance to Curriculum:
 Stay Safe
 Level of Contact:
 Observation (Obs)
 Conversation (CC)

Contacts:

	Below 11		11-12		13-19		20+		Total
	M	F	M	F	M	F	M	F	
New Contacts	0	0	0	0	0	0	0	0	0
Previous Contacts	0	0	0	0	0	0	0	0	3
Total Contacts	0	3							

At the bottom, there is a 'No Notes' section.

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

Printing a Register

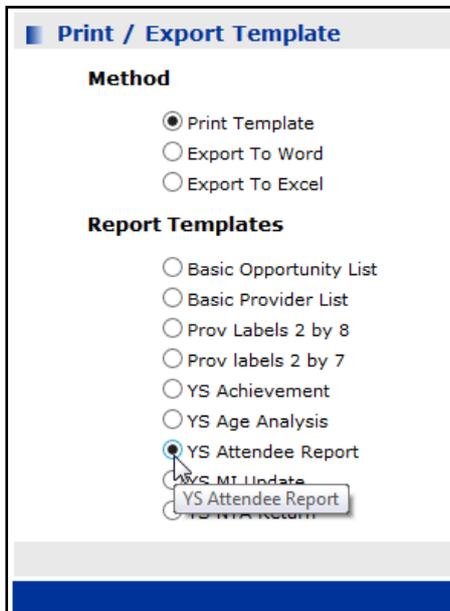
To print a register:

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

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



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

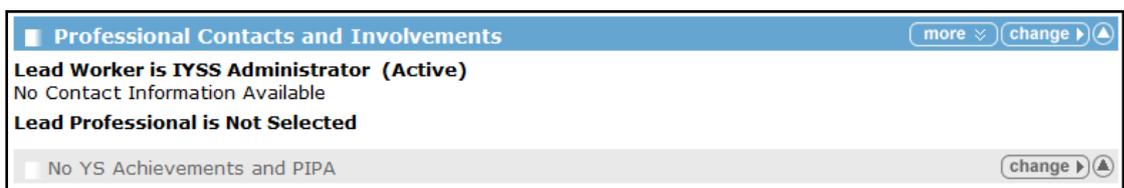


- In the **Report Templates** section select the report you want, e.g. **YS Attendee Report**.
- Click the **continue** button.

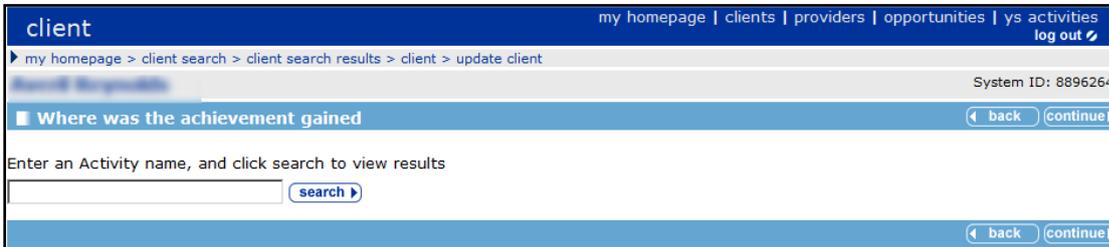
Your report is ready to view in PDF format. You can print it or save it using the tools on the tool bar.

Adding YS Achievements

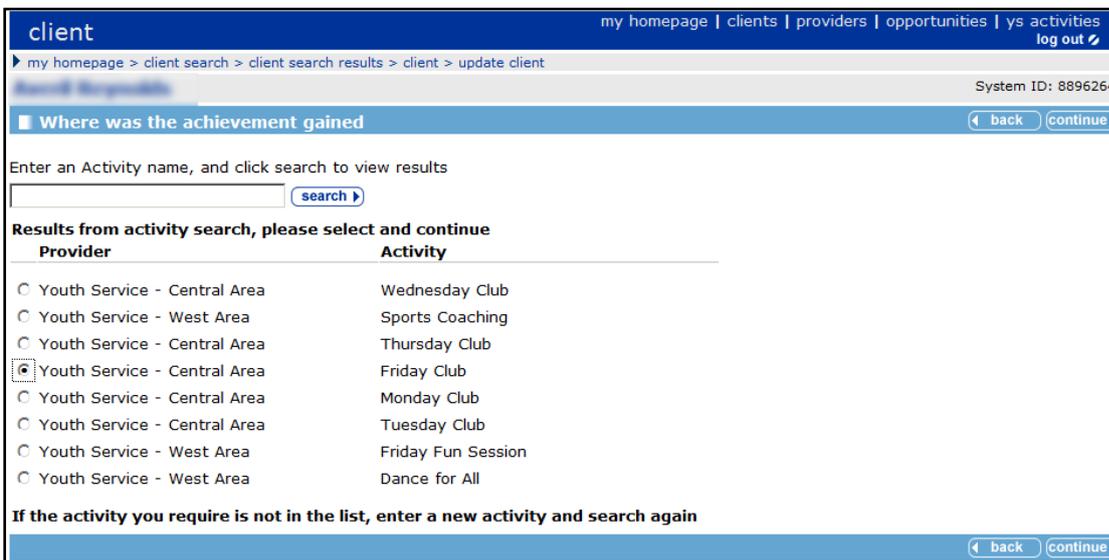
To add YS achievements to a client:



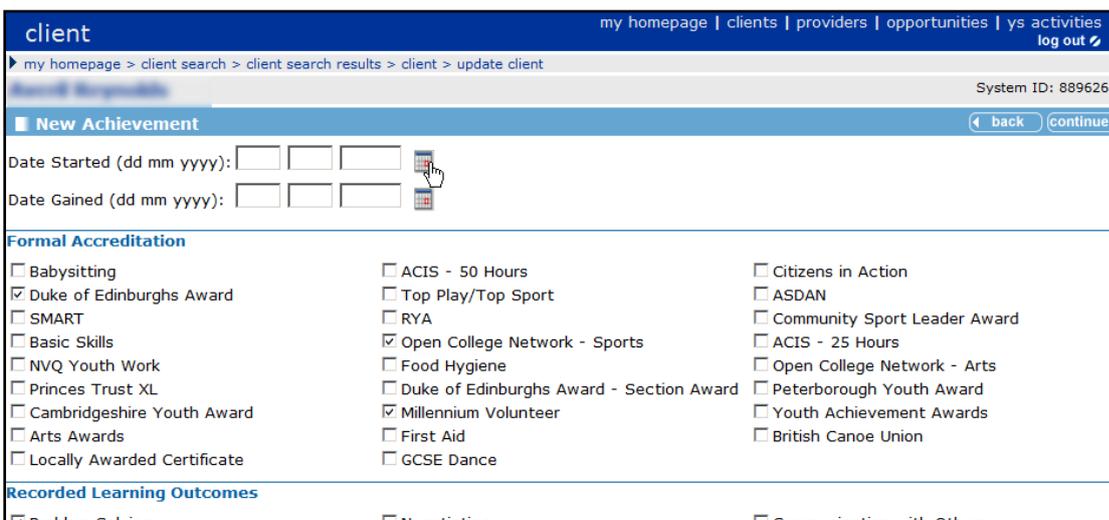
1. In the client's record, click the **change** button in the **YS Achievements** area of the **Professional Contacts and Involvements** section to display the **Change YS Achievements and PIPA** dialog.
2. Go to the **Achievements** section and click the **new achievement** link to display the **where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



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



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



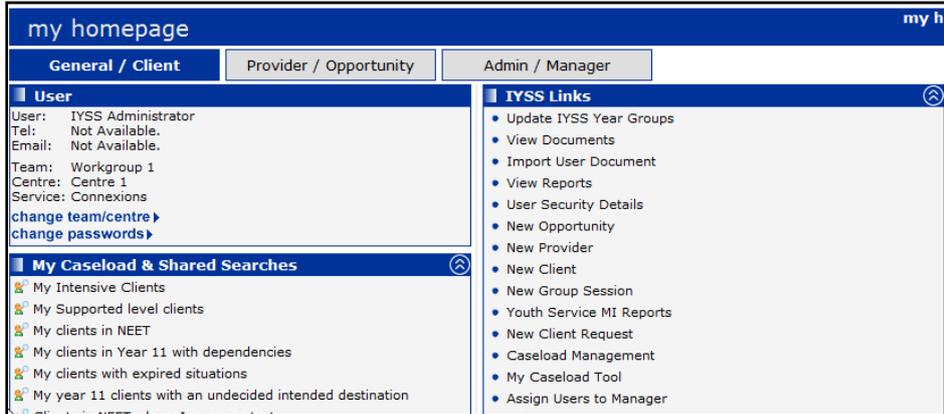
6. Enter the **Date Started** and **Date Gained** (if already gained). This can be completed later, if appropriate.

- Click the **continue** button to return to the **Change YS Achievements and PIPA** dialog. The **Achievement** is displayed in the list which you can amend later if required.

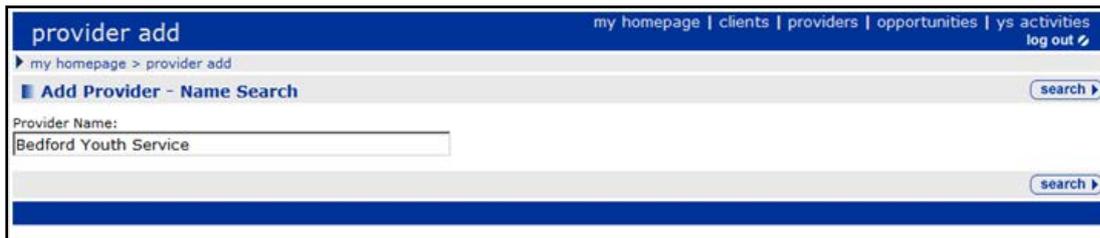
NOTE: This procedure can also be used from a session to add **Achievements** to multiple client records.

Showing a Provider under ‘ys activities’

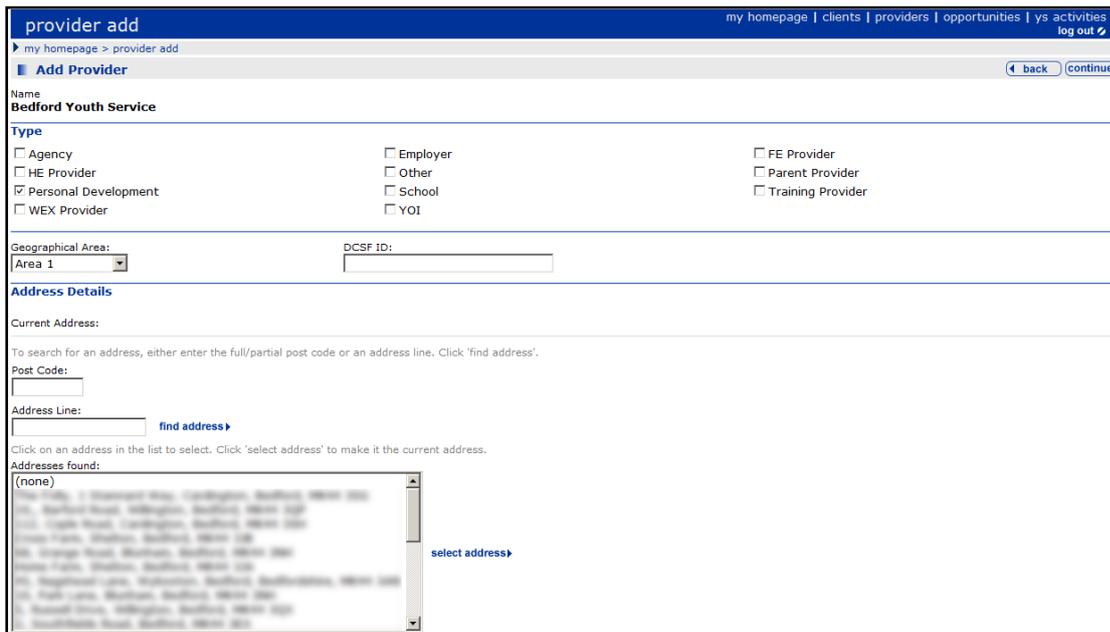
To make a provider show up under YS activities only:



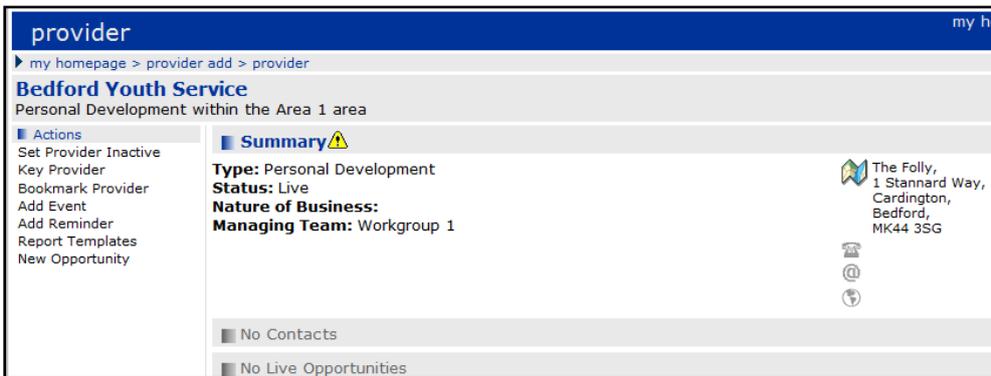
- On **my homepage**, click **New Provider** from the **IYSS Links** panel to display the **provider add** dialog.



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

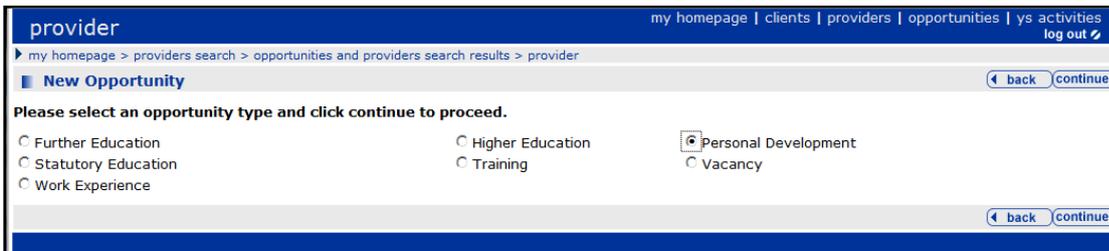


3. In the **Add Provider** dialog:
 - a. Select the provider's **Type** as **Personal Development**,
 - b. Select a **Geographical Area**,
 - c. Enter the first part of the **Post Code** with the first number of the second part of the postcode, e.g. RG37 4
 - d. Click the **Find Address** button to display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

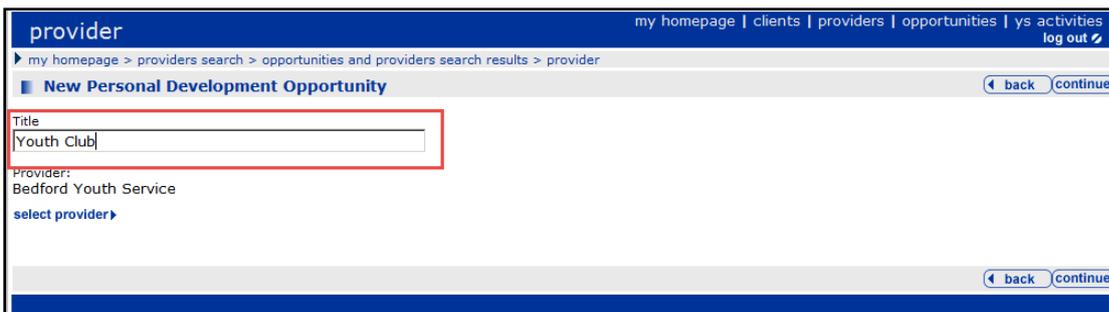


NOTE: A new provider has now been created. You can search and find it under **Providers** with a **Provider Type** of **Personal Development**. However, this will not show up in **YS activities** yet.

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



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



- If you want to add the opportunity to a different provider, see [Optional: Adding the Opportunity to a different Provider](#) on page 92.

Optional: Adding the Opportunity to a different Provider

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

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

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

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



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

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

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

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

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

At this stage, you can:

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

07 / Managing Caseloads

Overview

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

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

Caseload points

The caseloads are calculated using the following points system:

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

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

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

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

Caseload point variations

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

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

Staff variations examples

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

Client variations examples

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

Assigning Advisers to Managers

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

To assign a user to a manager:

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

Removing Advisers from Managers

Each manager defines which advisers are under their charge.

To remove a user from a manager:

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

Viewing Caseload Management data

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

Navigation		Caseload Summary By Level Of Need											
My Aspire		Manager: Lynn Beardsmore											
Analysis By		Lead Worker	Utilisation	Total	Intensive Support		Supported		Minimum Intervention		Not Determined		
Level Of Need	Case Load Type				%	No.	%	No.	%	No.	%	No.	
		Daniel Foster (100%)		128%	20	45%	9	20%	4	25%	5	10%	2
		Bridget Handsworth (100%)		312%	136	66%	90	18%	24	16%	22	0%	0
		Chris Mann (100%)		142%	28	36%	10	18%	5	46%	13	0%	0
		Elaine West (100%)		142%	92	42%	39	27%	25	27%	25	3%	3
		Total			276	54%	148	21%	58	24%	65	2%	5

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

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

Chris Mann (100%)

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

Chris Mann (100%) User is very over utilised

To view advisor caseload data:

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

Navigation		Caseload Summary By Level Of Need											
My Aspire		Manager: Lynn Beardsmore											
Analysis By		Lead Worker	Utilisation	Total	Intensive Support		Supported		Minimum Intervention		Not Determined		
Level Of Need	Case Load Type				%	No.	%	No.	%	No.	%	No.	
		Daniel Foster (100%)		128%	20	45%	9	20%	4	25%	5	10%	2
		Bridget Handsworth (100%)		312%	136	66%	90	18%	24	16%	22	0%	0
		Chris Mann (100%)		142%	28	36%	10	18%	5	46%	13	0%	0
		Elaine West (100%)		142%	92	42%	39	27%	25	27%	25	3%	3
		Total			276	54%	148	21%	58	24%	65	2%	5

- To analyse the information based on caseload type, click the **Case Load Type** hyperlink in the **Analysis By** panel.
- To view more information about a specific advisor, click their name to display the **Lead Worker Caseload Details By Interview** page.

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

- To analyse the information based on caseload type, click the **Caseload Type** hyperlink in the **Analysis By** panel.
- To view a list of clients associated with the advisor, click the number entered in the required **No.** column to display the **Client Summary** page. You can click on an individual client's name to display their client record.

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

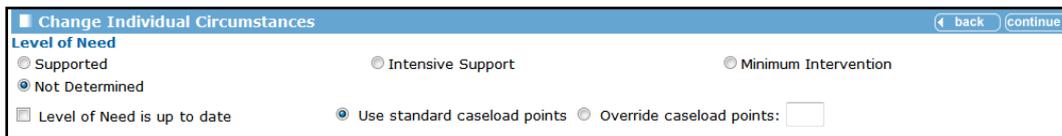
Changing a Client’s Caseload Points

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

More Information:

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

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



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



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

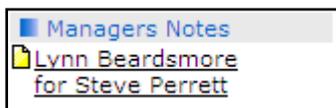
Adding Manager Notes

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

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



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



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

To add a manager note to a client record:

1. Open the client record to which you want to add a manager’s note. For more information on opening a client record, see [Searching for and viewing a single client record](#) on page 8.

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

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

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

My Caseload Tool

The My Caseload tool enables Lead Workers to:

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

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

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

Analysis by Level of Need

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

Analysis by Caseload Type

Viewing Caseload Management Data

To view caseload management data using the My Caseload Tool:

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

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

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

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

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

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

- a. To analyse the information based on caseload type, click the **Caseload Type** hyperlink in the **Analysis By** panel.
- b. To view a list of clients associated with you, click the number entered in the required **No.** column to display the **Client Summary** page. You can click on an individual client's name to display their client record.

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

08 / Appendix – System Administrator

Bulk Updating Client Records to IYSS

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

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

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

Reviewing the IYSS Bulk Updates Report

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

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

Bulk Updating Student Records to IYSS Records

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

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

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

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

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

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

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

Once the schools have been converted and opportunities added, they are available for conversion.

5. Choose the **Team** and **Centre** to be allocated to the **Schools** you have selected for update.

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

clients my homepage | clients | providers | opportunities | ys activities log out

my homepage > client year group Service: Connexions

Year 15 Client Conversion back

WARNING MESSAGE – Please consider the performance of your system in deciding how many school to convert at one time. The recommendation is to run this process out of hours or at a time when the system is not in full use and do a few schools at a time.

Available for conversion: 3 schools less

Managing Team Workgroup 1 Managing Centre Centre 1 convert

School	No of Records	Select for Convert	Status
School	100	<input checked="" type="checkbox"/>	
(p4r)	178	<input checked="" type="checkbox"/>	
College	115	<input checked="" type="checkbox"/>	

No Opportunity: 2 schools less

School	No of Records		
School (p4mt)	39		
Centre	6		

No IYSS Provider: 14 schools less

School	No of Records		
School	2		
School	1		
School	1		
School	2		
Middle School	5		

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

clients my homepage | clients | providers | opportunities | ys activities log out

my homepage > client year group > client year group Service: Connexions

Year 15 Client Conversion

School	No of Records	Convert	Status
School	100	<input checked="" type="checkbox"/>	In Progress
(p4r)	178	<input checked="" type="checkbox"/>	Pending
College	115	<input checked="" type="checkbox"/>	Pending

Recording Youth Contract Interactions

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

Before you start:

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

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

■ Youth Contract – Change Interaction Activities.

Recording Youth Contract Interactions

The screenshot shows the client record for 'NEET, Personal Development - Paid from 20/09/2013'. The 'Interactions and Communications' section is active, showing a list of interactions. The 'new' button in the top right of this section is highlighted with a red box.

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

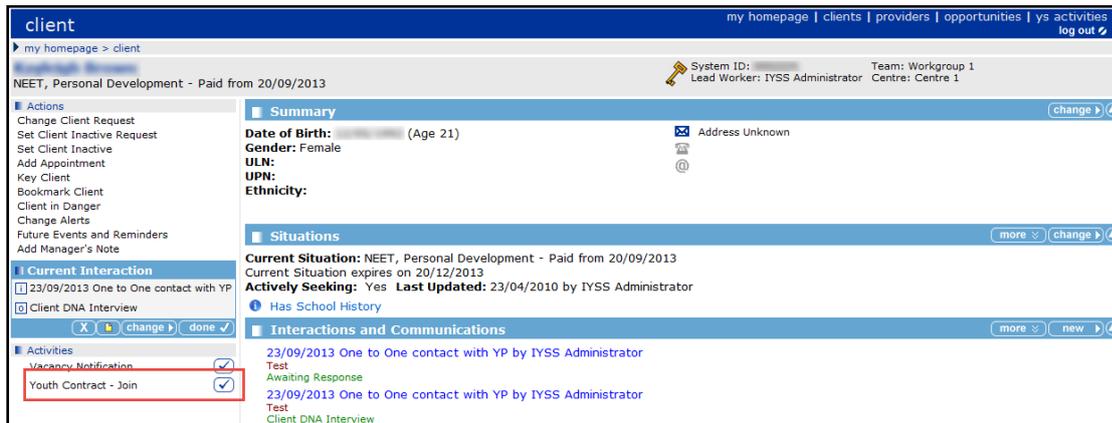
The 'New Interaction' dialog box is displayed, showing various interaction types. The 'One to One contact with YP' option is selected and highlighted with a red box.

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

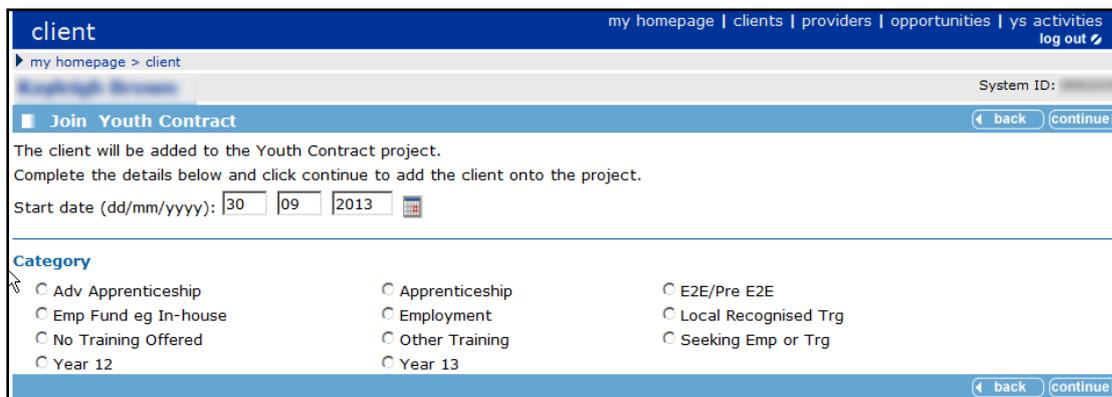
The 'New One to One contact with YP' dialog box is shown with the following details:

- Date (dd mm yyyy): 23 09 2013
- Start (hh mm): 11 15
- End (hh mm): 11 20
- Client Present Carer Present
- This interaction will be recorded for: Team: Workgroup 1, User: IYSS Administrator, Centre: Centre 1
- Category: General, Information sent to YP, One to One with YP
- Outcome: Awaiting Response, Client DNA Interview
- Venue: None, Home Visit, School
- Interaction Notes: Test

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

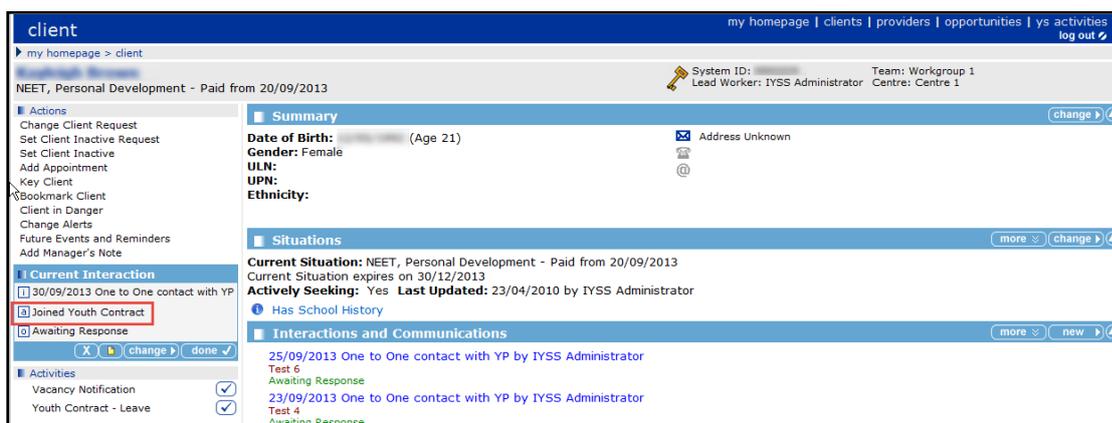


- Click the **Youth Contract – Join** link in the **Activities** panel to display the **Join Youth Contract** panel.



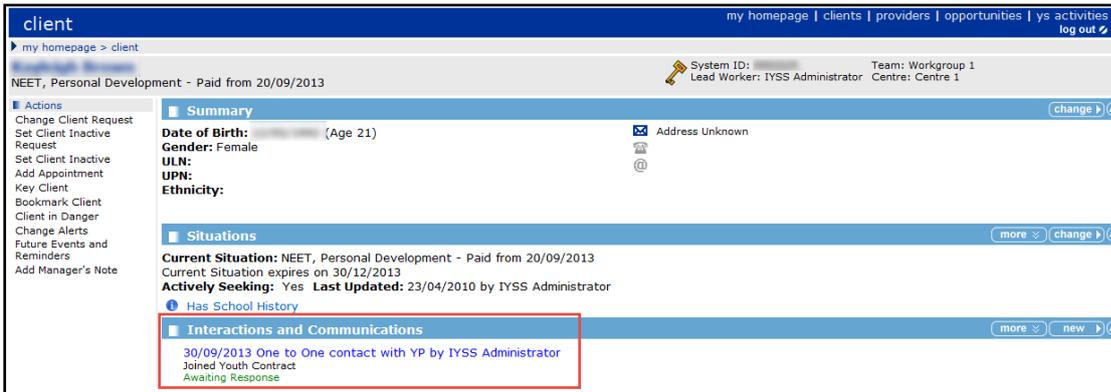
- Select the appropriate **Category** from the list.
- Click the **continue** button to display the client record which shows the **Joined Youth Contract** link in the **Current Interaction** panel on left-side.

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

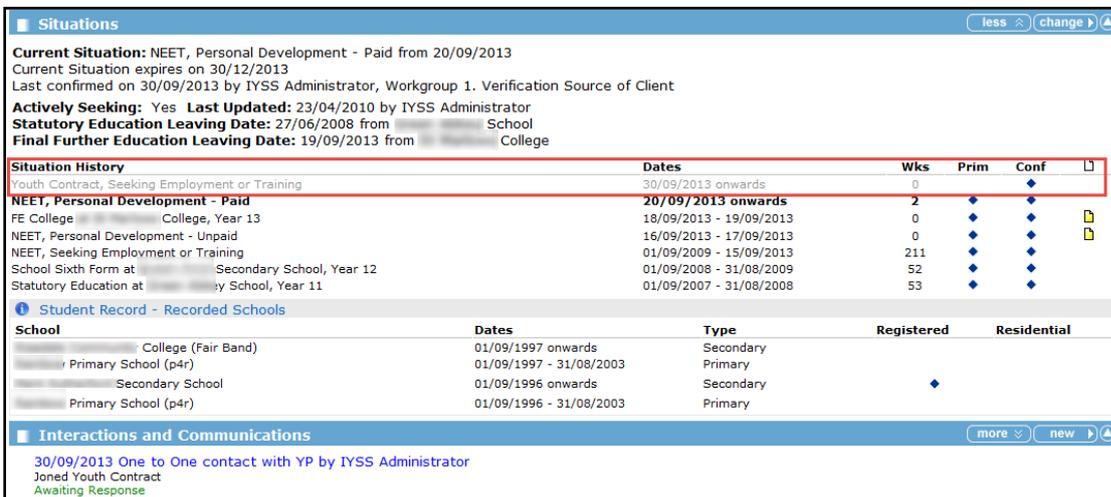


NOTE: Under **Activities**, the **Youth Contract – Leave** field is used when the young person leaves the Youth Contract.

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



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



Uploading Client Lists

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

The client upload facility assumes the following:

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

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

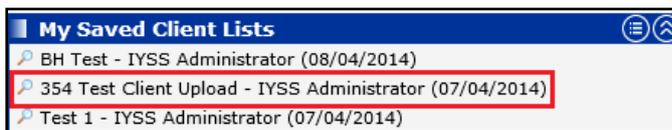
1. Select **My Homepage | IYSS Links | Upload Client List** to display the **Upload Client List** dialog.

2. Enter the fields as follows:

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

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

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



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

NOTE: Clients with errors in their ID data are not listed in the search results. Such errors are simply ignored and not 'excepted' out.

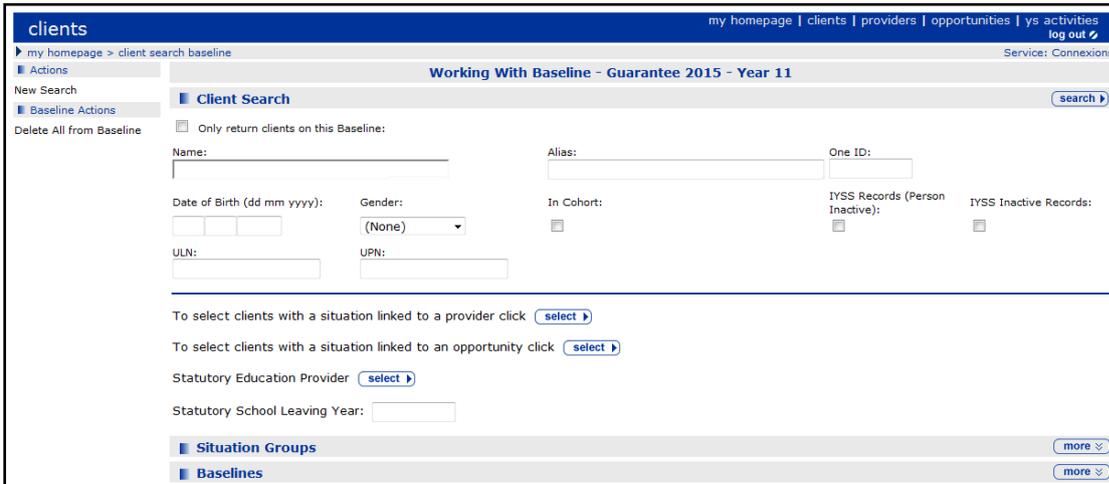
To view **My Saved Client Lists** you need the security permission: **My Aspire Sections | My Saved Client Lists**.

Updating Clients to Baseline

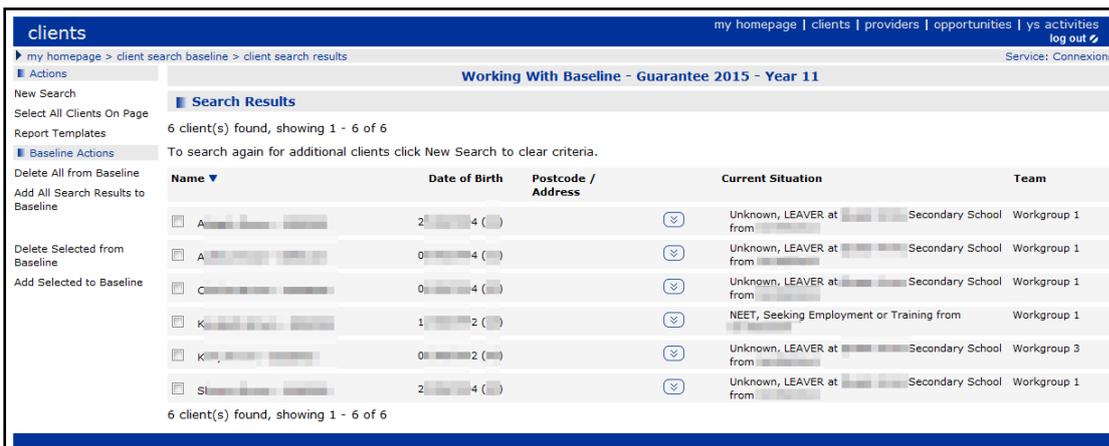
To search for clients and add them to a baseline:

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

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



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



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

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

Index

Agencies		
link client to	48	
record a referral	48	
Appointments	6	
Aspirations		
update	59	
Baseline		
add clients to	108	
Breadcrumb trail	3	
Client group		
share	12	
using	13	
Client record		
add APIR	52	
add appointment	39	
add document	50	
add lead professional	47	
additional needs section	41	
appointment section	39	
aspiration section	58	
benefits and allowances section	60, 61, 62, 63, 64, 65, 66, 68	
carer contacts section	44	
consent to share information section	55	
document, notes and assessments section ..	50	
individual circumstances section	49	
individual circumstances section	42	
interaction and simple activities section ..	37	
navigate	31	
notes section	45	
overview	31	
qualification and attainment section	57	
sexual health section	43	
situations section	34	
summary section	32	
update in bulk	102	
view One involvements	48	
Clients		
add linked situation	35	
add new	18	
add to baseline	108	
add unlinked situation	34	
convert One to IYSS	26	
edit inactive details	30	
making inactive	28	
search for inactive	29	
search One and IYSS records	29	
sending messages	64	
special alert	63	
submit request to add	22	
upload client lists	107	
Group session		
add	23	
Homepage	5	
admin/manager view	7	
client/general view	5	
provider/opportunity view	7	
Key opportunities	7	
Key providers	7	
Login	1	
Logout	1	
Non IYSS client		
updating	15	
Opportunities		
add a submission	61	
add a vacancy to	68	
Providers		
add	67	
search	65	
show under YS activities	92	
Qualifications		
add	57	
Referrals	7, 48	
Search		
inactive records	8	
multiple clients	10	
save	14	
single client	8	
tips	9	
Session		
convert attendees to IYSS	26	
System Administrator		
tasks	102	
Youth Contract		
record interactions	104	
Youth Services		
add an activity	71, 73	
add curriculum details	75	
add session evaluation	79	
add sessions to an activity	73	
change session attendees	76	