Children's Centre Management Information System; CCM

Barcoding and messaging guidance



Family Services

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1. Introduction

The CCM barcoding and messaging guide is aimed at all CCM users.

This guide is to be used in conjunction with the CCM online help.

Table 1 gives details of additional CCM guidance documents that are available.

Table 1: CCM Guidance documents

Document name	Audience
Basic Guide to CCM	All CCM users
CCM Framework and Data Guidance	All CCM users
CCM guide to recording casework	 Children's centre management team Family support workers CCM superusers
CCM superuser guide	CCM superusers

All CCM guidance documents can be downloaded from the CCM Support page: <u>www.barnet.gov.uk/wwcib/ccm-support</u>

In addition to the guidance documents listed above there is also a CCM Messaging Acceptable Use Policy (Appendix 1) that must be adhered to when using the CCM messaging module.

2. Barcoding

2.1. Introduction to barcoding

Barcoding within CCM allows the allocation of unique barcodes to individuals and sessions.

In Barnet these barcodes are used to create membership cards for all children's centre users, which can be scanned every time the family attends any Barnet children's centre, which logs their attendance on CCM.

Every centre will have a number of Opticon barcode scanners that can be used in the centre and at community venues to log attendance at sessions. For information about purchasing additional Opticon barcode scanners contact <u>ccm.support@barnet.gov.uk</u>

To enable the use of barcoding within CCM the barcode logger application must be installed on the machine that will be used to download the data from the Opticon barcode scanner. For further details on how to download this application contact <u>ccm.support@barnet.gov.uk</u>

2.2. Assigning a barcode to an individual

- When new registrations are entered on CCM barcodes are not automatically assigned.
- CCM Support assigns barcodes in batches to all new registrations at least every two working days.
- Barcodes work on an individual level, not at family level.
- They are unique to each individual and are generated from the individual's identifier.

2.2.1 Barcode within the individual's record

This tab allows you to see if a barcode has been assigned to an individual record, this will be listed in the barcodes tab under existing barcodes:

ChildView The Children's Centre Ha	nager		User Name : SysAdmin Site	Site 1	7 ×
HOME #	HOME >> SEARCH PEOP	LE >> INDIVIDUAL FULL DET	AILS		
Search 💁					
O Family	Individual Full Detai	ils			
• People	NAME: Miss Ja	de Samuels			
Add Family Wizard	START DATE: 01/01/	2001			
C Advanced Search	ADDRESS: 36 Field	Iside View,Eastbourne,8C21	2LZ, (Outside SureStart)		
Service Providers		11 IV	N		
Mail Merge Data Extract	Requirements Atten	dances Referrals Health	Custom Nationality		
	Individual Personal Details	Notes Child Adult Relation	ships Barcodes Messages		
	Barrodes				
	Add - To add al	barcode, type or scan the bar	rcode into the Barcode' text box an	d click 'Add'.	
	Delete - To dele	ete an existing barcode, selec	t it from the list of Existing Barcod	es' and click 'Delete'.	
	Blocked State	ect the required status of the - Select 'No'/'Yes' according!	selected barcode and click Update v: if 'Ves' type in a Blocked Reason'	r. and click Update'.	
	(Note: the Bloc	ked Reason' will appear whe	n entering Individual Full Details'	via 'People' or 'Family' search	
	using our couct)				
	Barcode		Add		
	Existing Barcodes	SAM0162	Delete	Adding Barcodes	
41 DI					
Attendance 🕓		1			
Casework 0					A DESCRIPTION OF THE OWNER OF THE
Reports 👔					Cancel Save
Messaging 🧉					
System Admin	¢				
I e Capyright 2012 CASE All rights					¥229 😒

2.3. Children's centre membership cards

Barnet children's centres have a membership card scheme.

Membership cards should be issued to every individual/family that registers at any Barnet children's centre, this includes families that live out of borough.

Membership cards are designed to be produced for the whole family¹ however bespoke membership cards can also be produced, see section 2.3.3 for details.

2.3.1 Membership card design

Membership cards are standard business card size and can be used for up to eight family members.

¹ a family is a group of individuals listed at the same address on CCM.

Family Services

The membership card is designed to show the following details:



Note: only four family members' barcodes will fit on each side of the card, if there are more than four family members, the card will have to be double sided.

2.3.2 Producing membership cards

Membership cards are produced by running custom reports.

Running a membership card report

1. Click on the 'membership Cards' tab within the reports menu

REPOR	T SELEC	TOR			
All Re	eports Pt	R Cross Tab Admin Insight Family Performance	Measures Data Quality Attendance Family Support Manager	nent Information	Membership Cards
		Name	Description	Old Parameters	Named Parameters
	<u>ii</u>	Barcode Family Card by Identifier	Barcode Family Card by Identifier		
	<u>ii</u>	Barcode Family Card by Site and Registered Date	Barcode Family Card by Site and Registered Date		
	<u>i</u>	Barcode Family Card by List of Identifiers	Barcode Family Card by Comma Separated List of Identifiers		
Ī	<u>ii</u>	Barcode Basic Session List	Barcode Basic Session List		

- 2. Click the graph icon that is relevant to the membership card report you wish to run
- 3. Enter the specific parameters

_	
Barnfield	
06/10/2014	Y
10/10/2014	V
	relast one from the 'Decise Ontions' list below .
	Barnfield 06/10/2014 10/10/2014

- 4. Click 'Produce Report'
- 5. The membership cards will then be generated. From here you can print or save the cards.

Note: we would advise that at the end of every week the report titled 'Barcode family card by site and date registered' is used to produce cards for any new registrations that week, and for the families to collect them on their next visit to the centre.

Membership card reports

The following reports are available to produce membership cards:

Report title	Description
Barcode family card by identifier	 This report can be used to produce a membership card for one family at a time. The identifier of one family member is used as the report parameter.
Barcode family card by site and registered date	 This report can be used to produce a batch of membership cards. The centre name and a date range are used as the parameters. It is advised that this report is used on a weekly basis to produce membership cards for newly registered families.
Barcode family card by list of identifiers	 This report can be used to produce membership cards for one family at a time. The identifier of one individual per family is used as the report parameter (identifiers must be separated with commas).

2.4. Barcode registers

From the Side Menu, click the Attendance button, then click the Barcode Registers option. You will see a screen similar to this:

The Children's C	entre Mana	iger.		User	Name : SysAdn	nin Site Site 1			?
IOME	*	TTENDANCE >> BARCOTH	IS REGISTERS						
Search	9	Barcode Registers							
Attendance	0								
D Input	~	Test Barcoding							
Review									
Barcode Registe	Irs								
Session Analysi	s	Comment							
		Barcode Registe	r for Day						
		In order to pro	oduce a Register for	a specified day	; select the requir	ed day and click 'Gene	rate Register';	a collection of registers will then be	displayed for
		any Sessions th	hat contain individua	ls registered or	n that date.				
		Select Day	06 Dec 2012	101					
		JUNCE DUT	00 Dec 2012		Generate Regi	ster			
		Barcode Regist	ter for Date Range						
		Barcode Regist	ter for Date Range produce registers wi a required then leave	thin a specific the list blank; :	date range; select alternately select	the 'Date From' and 'D an activity and only reg	ate To' dates a jsters for the s	nd click on the 'Generate Register' b elected activity will be produced.	utton. If all
		Barcode Regist In order to p activities are Date From	ter for Date Range produce registers wi required then leave 06 Dec 2012	thin a specific the list blank; : 	date range; select alternately select Date To	the 'Date From' and 'D an activity and only rep 13 Dec 2012	ate To' dates a jsters for the s	nd click on the 'Generate Register' b elected activity will be produced. Generate Register	utton. If all
		Barcode Regist In order to j activities are Date From Activities	ter for Date Range produce registers wi required then leave 06 Dec 2012	thin a specific the list blank; :	date range; select alternately select Date To	the 'Date From' and 'D an activity and only reg 13 Dec 2012	tte To' dates a jsters for the s	nd click on the 'Generate Register' br elected activity will be produced. Generate Register	utton. If all
		Barcode Regist In order to j activities are Date From Activities	ter for Date Range produce registers wi required then leave 06 Dec 2012	thin a specific the list blank; V	date range; select alternately select Date To	the 'Date From' and 'D an activity and only reg 13 Dec 2012	ate To' dates a jsters for the s	nd click on the 'Generate Register' b elected activity will be produced. Generate Register	utton. If all
		Barcode Regist In order to j activities are Date From Activities	ter for Date Range produce registers wil required then leave 06 Dec 2012	thin a specific the list blank; i	date range; select alternately select Date To	the 'Date From' and 'D an activity and only reg 13 Dec 2012	ate To' dates a jsters for the s	nd click on the 'Generate Register' b elected activity will be produced. Generate Register	utton. If all
		Barcode Regist In order to j activities are Date From Activities	ter for Date Range produce registers wil required then leave 06 Dec 2012	thin a specific the list blank; i	date range; select alternately select Date To	the 'Date From' and 'D an activity and only reg 13 Dec 2012	ate To' dates a jsters for the s	nd click on the 'Generate Register' b elected activity will be produced. Generate Register	utton. If all
		Barcode Regist In order to j activities are Date From Activities	ter for Date Range produce registers wi required then leave 06 Dec 2012 06 Dec 2012	thin a specific the list blank; i	date range; select alternately select Date To	the 'Date From' and 'D an activity and only reg 13 Dec 2012	ate To' dates a jisters for the s	nd click on the 'Generate Register' b elected activity will be produced. Generate Register	utton. If all
Casework		Barcode Regist In order to j activities are Date From Activities Barcode Regist	ter for Date Range produce registers wi required then leave 06 Dec 2012 06 Dec 2012 ter for Site Activitie	thin a specific the list blank; i	date range; select alternately select Date To	the 'Date From' and 'D an activity and only reg 13 Dec 2012	ate To' dates a jsters for the s	nd click on the 'Generate Register' b elected activity will be produced. Generate Register	utton. If all
Casework		Barcode Regist In order to j activities are Date From Activities Barcode Regist In order to j Generate Re	ter for Date Range produce registers wil required then leave 06 Dec 2012 06 Dec 2012 ter for Site Activitie produce a report coo gister'. If all location	thin a specific the list blank; i v v v s	date range; select alternately select Date To Date To	the 'Date From' and 'D an activity and only reg 13 Dec 2012 d Location: please sele on from the list and sim	ate To' dates a jisters for the s	nd click on the 'Generate Register' b elected activity will be produced. Generate Register and/or Location from the lists and c	utton. If all
Casework Reports Messaging	~ •	Barcode Regist In order to j Date From Activities Barcode Regist In order to j 'Generate Re	ter for Date Range produce registers wil required then leave 06 Dec 2012 06 Dec 2012 ter for Site Activitie produce a report coo gister'. If all location:	thin a specific the list blank; i v v v s ataining all act s required do n	date range; select alternately select Date To tivities per Site ar tot select any opti	the 'Date From' and 'D an activity and only reg 13 Dec 2012 d Location: please sele on from the list and sim	ate To' dates a jisters for the s v v sct which Site a ply click on the	nd click on the 'Generate Register' b elected activity will be produced. Generate Register and/or Location from the lists and c e button.	utton. If all

2.4.1 Barcode register for the day

To produce a register of individuals booked into sessions on a specific date, select a date and click 'Generate Register'. A report will be produced.



2.4.2 Barcode register for date range

To produce a register of individuals booked into sessions for a date range, select a date range. The register can be restricted to a specific activity by making a selection from the Activities dropdown. Click 'Generate Register' to produce the report.

In order to	produce registers within	n a specific	date range; select	the 'Date From' and 'Da	te To' dates and	d click on the 'Generate Regi	ster' button. If all
activities ar	e required then leave the	e list blank;	alternately select	an activity and only regi	sters for the sel	ected activity will be produc	ed.
ate From	01 Nov 2012	¥	Date To	30 Nov 2012	~	Generate Register	
	Prod Brook Store	1000					

2.4.3 Barcode register for site activities

-	المراجع	
In order to	produce a report containing all activities per Site and Location; please select which Site and/or Location from the lists and	id click on the
Conorato R	emister' If all locations required do not select any option from the list and simply click on the button	
'Generate R	egister'. If all locations required do not select any option from the list and simply click on the button.	
'Generate R	egister'. If all locations required do not select any option from the list and simply click on the button.	

To produce a list of activity barcodes for each location at each centre, select a centre and location. Leave the Location blank if all locations are required. Click 'Generate Register to produce the report as illustrated below. The report can be saved in a number of different formats.



2.4.4 Barcode register for site sessions

To produce a list of session barcodes for each location at each centre, select a centre and location. Leave the Location blank if all locations are required. Click 'Generate Register' to produce the report.

a report containing al	l sessions per Site and Location; ple	ease select which Site an	d/or Location from the lists and cl	ick on the
all locations required	do not select any option from the list	and simply click on the	hutton	ick on the
an iocations required	do not select any option nom the his	and shirpsy click on the	outon.	
101	Select Location	101	Ganarata Register	
	all locations required	all locations required do not select any option from the list	all locations required do not select any option from the list and simply click on the	all locations required do not select any option from the list and simply click on the button.

Note: sessions need to be set up in advance of producing this report.

2.4.5 Barcode register for site attendees

To produce a list of barcodes for all individuals who attended an activity at a centre within a selected date range, select an activity, date range and centre. The list can be restricted to monthly (include activities tick box) or session (include sessions tick box) attendances. Click 'Generate Register to produce the report.

In order to pr	oduce a report containing all i	ndividuals that have att	ended the specified	Activity: plea	se select the Activity f	from the list and the date
range of the ac	tivities. If you wish to include	Activities and Sessions e	nsure that these box	es are ticked a	and then click on 'Gene	rate Register'.
elect Activity	Food for Life	Date Range	01 Nov 2012	M	13 Dec 2012	V
elect Activity elect Site	Food for Life	Date Range	01 Nov 2012	~	13 Dec 2012	

Note: This report can be used if the same attendees attend the same activity on a regular basis rather than scanning each membership card. For example a six week parenting programme.

2.5. Producing session registers

In addition to the barcode register for site sessions report (see section 2.4.5) available in the attendance menu, there is a custom report that can be produced to list.

2.5.1 Barcode basic session list

Within the membership cards tab within the reports menu there is a report titled 'Barcode basic sessions list'.

This report can be run using the following steps:

- 1. Click on the 'membership Cards' tab within the reports menu
- 2. Click on the graph icon next to the report titled 'Barcode basic sessions list'
- 3. Enter the parameters (centre, session start date, session end date) and select the 'basic session barcode list' in the design options
- 4. Click on the 'Produce Report' button to produce the report as illustrated below.

Note: sessions need to be set up in advance of producing this report. We would advise setting up all sessions for the coming week on a Friday so that this report can be generated each day.

2.6. Opticon barcode scanner

Every centre will have a number of Opticon barcode scanners that can be used in the centre and at community venues to log attendance at sessions.

For information about purchasing additional Opticon barcode scanners contact ccm.support@barnet.gov.uk

The first time that the Opticon barcode scanner is used on each computer it may need to be installed. For support with installing the Opticon barcode scanner contact ccm.support@barnet.gov.uk

2.6.1 Using the Opticon barcode scanner

The scanner has two buttons:

- 1. The large button is to be used to scan barcodes
- 2. The small button is to remove barcodes that have been scanned in error

Note: the scanner does not hold any personal data once it has scanned a membership card. The only data it holds is the identifier of the individual.

2.6.2 Logging attendances using the Opticon barcode scanner

Once the session list has been produced and attendees arrive the following steps should be followed to log their attendance at the sessions:

- Scan the barcode of the session that the individual would like to attend
 Note: if you only have one session running, then you only have to scan the session code
 once at the beginning. All membership cards that you scan after this will be associated
 with this session, until a different session barcode is scanned.
- 2. Scan the barcodes on the membership card of all family members attending that session
- Download collected attendances from the scanner See section 2.7

2.7. CCM barcode logger application

To enable the use of barcoding within CCM the barcode logger application must be installed on the machine that will be used to download the data from the Opticon barcode scanner. For further details on how to download this application contact <u>ccm.support@barnet.gov.uk</u>

2.7.1 Configuring the application for the first time

The first time that you use the barcode logger application you will need to configure the application.

1. Click on the config button

Barcode Logger	<u> </u>
Child View The Children's Centre Manager	
Add New Attendance If Opticon Barcode device attached; click 'Read Opticon': Read Opticon	Config.
 Please scan (or type in and click 'Add') a Session/Attendance barcode above. Once this is added; please scan the attendees barcodes beneath it. Once the Sessions and attendees are added below in correct order, click on the 'Browse' button to select a location to save an xml file containing the data. Click on the 'Save' button to save the data from the table below into the specified XML file from step 2; this will be labelled 'barcodes([date time]).xml'. 	
Record Type Ordering A Barcode Name/Description Date Time	
	Up
Remove Clear Save To Stagin	

2. You will then need to define a folder location where you want the data collected with the scanner to be stored.

File Save Setti	ngs	
Save to Path :	C:\TEMP\Download barcodes	Browse

3. Click on the 'Find Port' button. This ensures that your computer can 'see' the scanner.

ticon Settings		
Port: 4	Find Port	Auto Save 🗹
Opticon Current Date Time :	Get	Sync Date Time

- 4. Tick the 'Auto Save' button.
- 5. Close the config page.

2.7.2 Downloading the data

1. Click the 'Read Opticon' button

				The ChildView The Children's Centre Manager	ACI
			Add New Attendance		Config.
Opticon Barcode	device attached; dick	: 'Read Opticon':	Read Opticon		
Please scan (or t	voe in and dick 'Add')	a Session/Attendance	e barcode above. Once this is added: please scan the att	rendees harcodes heneath it	
Once the Session	is and attendees are	added below in correct	ct order, dick on the 'Browse' button to select a location to	o save an xml file containing the data.	
Click on the 'Save	e' button to save the	data from the table br	elow into the specified XML file from step 2; this will be lab	velled 'barcodes([date time]).xml'.	
Record Type	Ordering	Barcode	Name/Description	Date Time	lle
Session		1 ASSUNDEFINED	(Not Found)	11 Nov 2014 03:01:20	οp
Individual		2 5000158063914	(Not Found)	11 Mar 2020 02:06:14	Down
Session		3 ASS73177	(Not Found)	11 Mar 2020 02:06:35	
Session		4 ASS71915	(Not Found)	15 Mar 2020 05:20:05	
Individual		5 05710409	(Not Found)	15 Mar 2020 05:20:35	
	Clear Optic Do you w	on vant to delete the ad	Ided items from the scanner?		
		(Yes No		

Note: you will be presented with an option to delete the added items from the scanner. Select 'yes'. This will delete all data from the scanner.

You will have a list of all sessions and individuals whose barcodes have be scanned.

- 2. Click the 'Save' button. This will create a file in the folder specified on the config page.
- 3. To finish the process, open CCM.

2.8. Loading attendance data to CCM

To load the data file created in the barcode logger application:

- 1. From the Main Menu select System Admin > Barcodes
- 2. Click on the 'File' tab
- 3. Browse to the data file created in the barcode logger application and click 'upload'

ChildView	?	
HOME 44	anager User Name : LaurenBurbidge Site : Bell Lane	
Search O		
Attendance	Barcodes	
Casework		
Deporte	Lange ITS Shalls	
	Manage ruc Stagnig	
Messaging	4 	
System Admin		
Activity Manager	Upload File	
Audit Viewer		
Correspondee Check	This allows xml files created via the Barcode Manager' Windows application to be uploaded into the Staging table in the database and from there allocated to	5
Edit Drop Downs	Attendances.	
Key Workers	Step 1) Click on the Browse' button below and locate the xml file you wish to upload from, and then click Upload.	
Merge Duplicates		
Registration Options	barcodes(11-5-2014_112838).xml × Browse	
Dynamic Content Options	Upload	
Application Options		
Field Definition		
Confidentiality Group		
Report Admin		
≫ Base Line Data Manager		
Statistical Data		
» Barcodes		
Resources		
Upgrade Professional Relationships		
Manage Ethnicities		

- 4. Click on 'Save'
- 5. Click on the 'Staging' tab

6. Search for 'Unprocessed Barcodes'

Manage File Staging				
Staging Search		n 111		
Select search cri	teria and click on the	'Search' button.		
State	Both Ô	Processed 💿	UnProcessed (@	
Date From Batch		Date To	Search	
Help Info				

7. You should be able to see the sequence of sessions and individual barcodes that you scanned.

sel 🔺	Barcode	Туре	Details	Added On	Batch Id	Processed	* S	iel 🔺	Barcode	Туре	Details	Added On	Batch Id	Processed	Site	
	ASS73177	SESSION	Breastfeeding Support &	11/03/2020	0	False					No da	ata to display				
			Advice - 02/10/13 - Oct 2 2013	02100100			Se	elect M	Month/Yea	r		2014				
	ASS71915	SESSION	Watling Baby Clinic-	15/03/2020 05:20:05	0	False	Se	elect S	Site	Bar	nfield	2014				
			03/10/2013 - Oct 3 2013				A	ctivitie	es					~		
	05710409	CHILD		15/03/2020	0	False	Se	ession	S					~		
							÷									ŀ

Note: sessions will be highlighted in yellow, and individuals will be blue.

8. Click on the 'Select All' button, the 'Add', then 'Save'

el 🔺	Barcode	Type	Details	Added On	Batch Id	Processed	*	Sel 🔺	Barcode	Туре	Details	Added On	Batch Id	Processed	1
V	ASS73177	SESSION	Breastfeeding Support & Advice - 02/10/13 - Oct 2 2013	11/03/2020 02:06:35	0	False			ASS73177	SESSION	Breastfeeding Support & Advice - 02/10/13 - Oct 2 2013	11/03/2020 02:06:35	0	False	1
7	ASS71915	SESSION	Watling Baby Clinic- 03/10/2013 - Oct 3 2013	15/03/2020 05:20:05	0	False			ASS71915	SESSION	Watling Baby Clinic- 03/10/2013 - Oct 3 2013	15/03/2020 05:20:05	0	False	1
V	05710409	CHILD		15/03/2020 05:20:35	0	False			05710409	CHILD		15/03/2020 05:20:35	0	False	
								Select	Month/Year						
								Octob	er	4	2014		4		
								Select	Site	Barnfield	1	~			
								Activiti	es			~			
								Session	ıs			~			
						•	Ŧ	•			. 111				F
	-			B	1				Course	Cat C		Demonstra		less.	

Once you have clicked 'Save' all attendances will be logged in the system.

Note: we recommend that this process is carried out on a daily basis. If the scanner is lost before the data has been downloaded to a computer, there is no way to retrieve this information.

3. Messaging

3.1. Introduction to CCM messaging

The messaging functionality enables the sending and receipt of internal messages (via the CCM database) and external messages (via email and SMS).

Messaging enables communication between Key Workers, and the individuals that they are involved with in terms of Attendance Sessions, Referrals or Casework.

The messaging functionality includes the ability to create groups comprising a mixture of Individuals, Key Workers who are linked to User Accounts and Key Workers who are not linked to User Accounts.

Note: the messaging functionality is only to be used for the purposes set out in the CCM Messaging Acceptable Use Policy (Appendix 1). Failure to comply with this policy will lead to withdrawal of access from the system.

3.2. Messaging consent

Consent must be obtained from individuals before messages to promote the centre are sent out to them.

On CCM consent for messaging is stored in the individuals record on the 'Personal Details' tab. The consent is a tick-box titled 'Non CC Mail Shots'.

If an individual does not want to be contacted by the children's centre this box should be unticked.

Please refer to the CCM Messaging Acceptable Use Policy (Appendix 1) for further information about messaging consent.

3.3. Home screen

The Messages section of the Home Page initially shows messages received within a default date range of three months, which have not been marked as 'Read'. The date range can be amended and a different view can be selected. The options are Unread, Read and All (Internal), Email, SMS.

The illustration below shows an example of the Home Page Messages section.

The buttons at the top of the screen allow you to move quickly between sections. Click 'View messages' to see full message details, or 'Send Message' to create a new message.

3.4. Messaging

Press the 'Messaging' button in the side menu, then select the 'Messaging' option to gain access to your Inbox, and Sent Items.

A screen similar to the following will be displayed:

3.4.1 Inbox

You can change the view of your inbox by selecting from the various message types and specifying a date range.

The options 'Unread', 'Read' and 'All (Internal) refer to internal messages only. Unread messages are displayed in bold font, and expired unread messages are displayed in red.

Tick 'Read :' to mark the message as Read - the message will disappear from the grid.

Click 'Reply' or 'Reply All' to open the Message Send window with the Recipients Tab preloaded with details of the sender only ('Reply'), or the sender and everyone else that the message was addressed to ('Reply All'). 'Reply All' will include linked and non-linked Key Workers and exclude Individuals.

The following example shows the Message Send window opened by the 'Reply' button.

en's Centre PL	anager		User Name 7 8	ysAdmin site Managem	ent Conso		_	_	_	_	_	_
*	Group	Recipi	ents Message									
0	Sele	ct/View	Recipients		_	_					-	
ily Wizard								- Shov	v/Hide	Recipi	ient Help I	Informa
Providers	E	nter 1st 3 ch	ars of the Recipient's Name:		_	_		тур	e: (AL	L)		
ge ract	N.C.	Name	Address	E-mail	Mobile	DOB	Recipient	1	E	1	In Gr	oup
	51	Sally	12 Colingwood Place Eastbourne	sallyevans@internet.com	07941-	Not Set	User				×	
ie Q	¢/											
e <u>Co</u>	<u>S</u> Ba	ck .	Next									
re C	Ba	x	Next									
	Ba	¢.	Next									

3.4.2 Sent items

You can change the view of your Sent Items by selecting from the various message types and specifying a Date Range.

Select any item displayed in Sent Items to open the message and review the content, as illustrated in the example below:

		User name : SysAdmin	manageme	nt console	
•					
*					Keply As Reply
<u> </u>	3				2
	Cant Ihams				
end 📕	Sent Items				
					- Show/Hide Sent Rems Help Informatio
	View : Expired	om : 28 Feb 2013 🕑 10 : 01 Jun 2013 🖄	2		
	Tria	Text	Evorey Date	Sent On	Title: Internal Messaging From: (N
	Test	Test Msg From: SysAdmi	31/05/2013	31/05/2013	To (Pead):
			21 (05/2012	15:54:39	To (UnRead): Sally Evans
	Internal Messaging	This is an example of interna	31/05/2013	31/05/2013 15:39:02	This is an example of internal messaging
					Msg From: SysAdmin
	5				Forward Forward A
	Email (Users): Email (Users):				Forward Forward A
	Email (Users): Email (Individuals): Tad (Users):				Forward Forward A
	Email (Users): Email (Individuals): Text (Users): Text (Individuals):				Forward Forward A
	Email (Users): Email (Individuals): Text (Individuals):				Forward Forward A
9 A	Email (Users): Email (Individuals): Text (Users): Text (Individuals):				Forward Forward A

Click 'Forward' or 'Forward All' to open the Message Send window with either a blank Recipients Tab ('Forward'), or the Recipients Tab pre-loaded with everyone that the message was sent to ('Forward All').

The following example shows the Message Send window opened by the 'Forward' button.

The Children's Cent	re Manager . User Name : Sally Evans Site : Site 1	r	
HOME	4 HESSAGING		
earch	💁 Extended: 🗹		
ttendance	S Groups Recipients Message		
asework	.0		
eports	Send Message		
lessaging			
Messaging	Additional Internal	- Show/Hide Message Help Information -	
Message Send	(Prease type in any any keyworkers names to include in an internal message, seperate with ; eg Joh Pau, Andy Simon; j:	1	
Groups	Additional Emails (Please type in any additional Email addresses to include, seperate with ';' eg 'johnsmith@hotmail.com;fredbloggs@hotmail.com;');		
	Additional SMS (Please type in any additional Mobile numbers to include in SMS message, seperate with ';' eg '345235326;23636236;32332636;'):		
	Title:		
	RE: Test message		
	Message:		
	Msg From: Sally Evans		
	Emploi from CCU Web 326		
	Msg From: Sally Evans		
	Message (SMS/Text - maximum 160 chars): (Copy From Main Message?) 🖂 Num chars remaining - 160	×	
	Expires On:	Messages Send	
	Back		
rstem Admin			>

3.5. Creating groups for messaging

Groups can be created in the messaging system to speed up the selection of recipients. A Group can comprise a mixture of Key Workers and Individuals.

Press the 'Messaging' button in the side menu, then select the 'Groups' option. A screen similar to the following will be displayed:

ChildVie The Children's Co	W	aner Iter Name - SusAdmin Site - Management Console	?	×
HOME	4			-
Search	0	Groups Herribers		
Attendance	Q		-	
Casework	0	Manage Countr		
Reports	4	manage viruups		
Messaging	4	- Show/Hide Group Help Inform	ation -	
D Messaging	0	No results found. Enter new criteria.	4	
Message Send				
Groups				
			8	
	-	Add Inherit Import Edit Delete Send		
Surtam Admin	2			
Site Admin	-			
Site Admin	6 4		_	X

3.5.1 Add a group

Press the 'Add' button to open the 'Add/Edit Group' window as illustrated below:

ChildVioux		
The Children's Centre Mar	Bager User Name : SysAdmin Site : Management Console	? ×
OME 📢	Manual of Manual State	
earch 💁		
tendance 🕓		
sework 🤙		
iports 👔		
essaging 🤞	GROUPS:	- Show/Hide Group Help Information -
Messaging	No results found. Enter new criteria.	
Message Send		
Groups		
	Add/Edit Group	
	Type: ADO	
	Title:	
	Description:	-
	Groups : -Archived	
		OK.
-	Add believe Edd Clinece Send	
2		5
rstem Admin		

Enter a Group title and description and click 'OK' to create the Group.

3.5.2 Creating a group using the attendance review or the mail merge data extract

Once you have entered your parameters and generated a list of individuals in either the mail merge data extract or the attendance review, the list can be used to create a message group.

An important feature in CCM is the correspondee status box, which is shown in the information presented when you select the Personal menu option in the Individual Full Details screen. The presence, or not, of a tick in this box determines whether a record is included in a Mailing List Extract.

The correspondee field is used by all the mail options within the database to indicate which member of each household you would want to write to.

Note: The Correspondee box is ignored when a Detailed Data Extract is done, rather than a Mailing List.

The output button

The output options panel, at the top of the screen, lets you decide how to use the results from your filtered lists.

You can export information linked to the records contained within your search results in to Excel format.

Click on one of the output options, then click the output button (this is the button located to the right hand side of the output options).

The output options are:

1. Correspondee mailing list for the selection

Use this option to create a list of all the nominated correspondees that are associated with the people on your list. If your list contains several children from the same family then the correspondee for that family will only be listed once (assuming only one correspondee status has been set. If multiple statuses have been set then each of these will be listed). Thus, you will see that the list of names making up the correspondee list will not be the same as the list shown in the search result section. This list of correspondee names and addresses can be sent to Excel and used as a mail merge data source for your letters or labels. The extract produced by the correspondee mailing list for the selection option only includes contact details.

2. Detailed data extract

The extract produced by the detailed data extract option includes most tick-boxes and data fields from a person's record. The names on the data list extracted will match those in your filtered list.

3. Attendances only

Choose a date from the drop down calendar, to be the starting point from when attendances are checked. This list will show only the attendance information attached to the names of the people in your filtered list – as such it is possible that the flags on an individual may be different at the time of attendance compared with when the list was created For example the 'AT Parent' column in the resulting attendance list refers to status of the parent flag(s) when that individual attended the activity – not the status of

the parent flag(s) when the data extract was undertaken. The 'AT Parent' indicators are

0 = not a parent.1 = is a parent.2 = is a lone parent.

Once the OUTPUT button has been clicked, you presented with the Data Pre-Extract Screen.

Selecting this icon in the data pre-extract screen will allow you to create a group from the selected individuals.

The grouping screen will open with options to add the selected individuals to an existing group or to create a new group with the selected individuals as members, up to a maximum of 500.

ChildView	the time of a data site of the t	?	×
HOME 4	Anager Verhaue SysAumin Site Site I		^
Search 💁	Mail Merne Data Extract Output		
Family People Add Family Wizard Advanced Search Service Providers Mail Merge Data Extract	Image: Construction of the construc	32	
Attendance C Casework 6 Reports 6 Messaging 6 System Admin 6	Create Group		>

3.5.3 Inherit from a group

Select an existing Group by ticking the select box and press the 'Inherit' button to open the 'Add/Edit Group' screen with the 'Inherit' option as illustrated below.

Image: comparise comparise sexwork oports cesagrig Messagrig Messagrig Messagrig Groups Comparise	hildView	anager	User Name : Sy	sAdmin Site : Managemen	t Console		?	
anch Coupe Since Seework by posts area Messaging Message Sond Groupe The Croup Help Information	ME 📢	Married and A Descent of Con-						
tendance sesaving were sended Message Send Groups Message Send Message Send Message Send Groups Message Send Message Send	arch 💁	Groups						
see Addmin	endance 🕓							
parts sessaging dessaging dess	sework 🧓	Manage Groups						
ssaging Add phere And phere State Phere </td <td>ports 👔</td> <td>Merrorest Accustors and</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	ports 👔	Merrorest Accustors and						
Addsaging Alessaging Alessaging Send Title: Description: 0 0 Image: Test Group 0 Image: Test Group 0 Image: Test Group 0 Image: Test Group Image: Test G	ssaging 🛃	GROUPS:				- Shave'Hide Group	o Help Information -	
Add Itext Group Add/Edit Group Type: A00 (Inherit) Title: Desciption: Groups: Archived CK add Inherit Inherit <td>Aessaging</td> <td>Title</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Aessaging	Title						
Sroups	lessage Send	Test Group					2	
Add/Edf Group Type: ADD (brhent) Tide: Descaption: Groups: -Archived OK	roups							
Add Inhant Edt Delete Send				Groups : -Archived				
	stem Admin	Add Intert In	port Edit Delete Send					

Enter a title and description for the new Group then click 'OK' to create the new Group and add the members from the selected Group.

3.5.4 Import from a group

Select an existing Group by ticking the select box and highlight a target Group for the Import by clicking on the row. Press the 'Import' button to copy the members from the selected Group into the target Group, as illustrated below.

ChildView	lanager	User Name : SysAdmin Site : M	anagement Console				?
HOME 44	SEARCH >> GROUPS					_	
Search 🔍	Groups Members						
Attendance 🕓							
Casework 🔒							
leports 👔	Manage Groups						
lessaging 🤞	. Jacons I			- Sh	ow/Hide Group	Help Information	-
Messaging	GROUPS:	Decedation	Tedhatdaala	Hears Take	1 Auchined	and and the	
Message Send	Tast Group	Test Group	nurviduars		r Archived	Select	
Groups	Test Group	Test Group 1	0	0 0	144		
	Test or oup 1	Test croop a			-		
ystem Admin	Add Inherit Im	port Edit Delete Send				ž	

In the above example, the members of Test Group would be copied to Test Group 1. Click 'OK' to proceed with the copy.

3.5.5 Edit group details

Highlight a Group by clicking on the row and press the 'Edit' button to open the 'Add/Edit Group' screen with the 'Edit' option as illustrated below:

ChildView			Contiduite the Management	Canada				?	-
HOME #	t Manager	Cash Name	aysaunin and Management	Console	-	-	-		l
earch 🔾									
ttendance									
asework o	Trendstate solution								
leports	Planage Groups								
lessaging 🤞	CROUDS:					wHide Group I	Help Informa		
Massaning	Title								
Messaging Message Send	Test Group								
Groups	Test Group 1	Test Group 1					13		
			Type: EUT - Test Group Title: Test Group Description: Test Group Groups : -Archived						
ystem Admin 🛛 🔏	Add Amer in	uost Edt Delate	Send						

Enter the required changes and click 'OK' to save the details.

3.5.6 Delete a group

Select the Group to be deleted by ticking the 'Select' box then press the 'Delete' button. A confirmation message will be displayed as illustrated below:

A Discourse	*	SEARCH >> GROUPS								
earch	0	Groups Hambler								
ttendance	ō	Groups Hernovers			_	-	_	_	-	-
Casework	0									
Reports	4	Manage Groups								
lessaging	-					- Show	v/Hide Group	Help Inform	nation -	
Managing	2	GROUPS:		60000000000000000000000000000000000000		-				
Messaging		Title	Description	Individuals	Users	Total	Archived	Select	19	
Groups	_	Test Group	Test Group	0	0	0				
Gioups		Test Group 1	Test Group 1							
				incel						
				net						

Click 'OK' to delete the selected Group.

3.5.7 Send to Group

Select a Group by ticking the 'Select' box then press the 'Send' button to open the 'Message Send' screen with the selected Group pre-loaded in the 'Groups To' area.

3.6. Message send

Press the 'Messaging' button in the side menu, then select the 'Message Send' option. A screen similar to the following will be displayed:

The Children's Centr	re Hanager User Name : SysAdmin Site : Manage	ment Console
HOME	• HESSAGING	
earch	Groups Recipients Message	
ttendance		
asework	Select/View Groups	
eports		- Show/Hide Group Help Information -
essaging	GROUPS:	
Messaging	no results found. Enter new criteria.	
Message Send		
Groups		
o.oopu		
		ai Li
	View Recipients Set Groups	
	CRAURE TO:	
	GROUPS ID.	
	SELECTED GROUPS RECIPIENTS:	
		<u>×</u>
rtom Admin		
Automin		
te Admin	S <	>

3.6.1 Groups

A message can be sent to one or more Groups, each Group comprising a mixture of Key Workers and Individuals. Group members can be view by selecting the Group and pressing the 'View Recipients' button as illustrated below:

and a second sec						
tondanco	Groups Recipients Me	SARE				
sework	Select/View Groups					
eports						0.0045
essaging	GROUPS:			- Show/Hide	Group Help Info	rmation -
	Title	Description	Inc	dividuals Us	ers Total	
Messaging	Key Workers	Al Linked Key Workers	0	12	12	
Message Send						
	View Recipients Set	Groups				
	View Recpients Set	Groups				0
	View Recpients Set	Groups				2
	View Recpients Set	Groups		11-11-		
	View Recpients Set GROUPS TO: SELECTED GROUPS RECIPIL Name Guanda Munches	Groups INTS: Address	E-mail	Mobile	Recipi	ent
	View Recpients Set GROUPS TO: SELECTED GROUPS RECIPI Name Gwenda Maughan Iuro Massela	Groups HTS: Address	E-mail	Mobile	Recipi User	ent
	View Recipients Set GROUPS TO: SELECTED GROUPS RECIPI Name Gwenda Maughan Ian Mcgaskel Jacken Wahfed	Groups ENTS: Address	E-mail	Mobile	Recipi User User	ent
	View Recipients Set GROUPS TO: SELECTED GROUPS RECIPIE Name Gwenda Maughan Ian Mogaskel Jackie Whitford Jackie Whitford	Groups Groups HTS: Address 45 Couth Augure Eastbourge TG6 EPE	E-mail	Mobile	Recipi User User User	ent 1
	View Recipients Set GROUPS TO: SELECTED GROUPS RECIPIE Name Gwenda Maughan Ian Mcgaskel Jacke Whitford Jacqui Brown	Groups ENTS: Address 45 South Avenue Eastbourne TG6 SRF	E-mail jacqubrown@myintemet.com	Mobile	Recipi User User User User	ent 1
	View Recpients Set GROUPS TO: SELECTED GROUPS RECIPI Name Gwenda Maughan Ian Mcgaskel Jacke Whtford Jacqui Brown Jil Voyce	Groups EHTS: Address 45 South Avenue Eastbourne TG6 5RF	E-mail jacqubrown@myinternet.com	Mobile	Recipi User User User User User	ent S

Press 'Set Groups' to include all Group Members as Recipients. The selected Group(s) will then appear in the Groups to area:

e Unidren's Centre	Manager	User Name : SysAdmin S	te : Management Console				?
ME	4 Messouth						
rch S	Groups Recipients M						
ndance 🤇	3				_	_	
ework	Select/View Groups						
oorts	1			- Show	Hide Group H	ieln Inform	ation
ssaging 🛃	GROUPS:						
lancasing	Title	Description		Individuals	Users T	fotal I	1
lessaging	Key Workers	Al Linked Key Workers		0	12 1	12 🕑	3
essage Genu							
		Description					
	Title	Description					
	Title Key Workers	Al Linked Key 1	Norkers				
	Title Key Workers	Al Linked Key 1	Vorkers				10
	Title Key Workers SELECTED GROUPS RECIP	Al Linked Key 1	Vorkers				14
	Title Key Workers SELECTED GROUPS RECIPI Name	Al Linked Key 1 Al Linked Key 1 Address	Workers E-mail	Mobile		Recipien	
	Title Key Workers SELECTED GROUPS RECIPI Name Gwenda Maughan	Al Linked Key 1	Workers E-mail	Mobile		Recipien User	
	Title Key Workers SELECTED GROUPS RECEP Name Gwenda Maughan Ian Mcgaskel	Al Linked Key 1	Vorkers E-mail	Mobile		Recipien User User	
em Admin	Title Key Workers SELECTED GROUPS RECIP Name Gwenda Maughan Ian Mcgaskel Jacke Whtford	Al Linked Key 1 Al Linked Key 1 Address	Vorkers E-mail	Mobile		Recipien User User User	

Press 'Next' to move to the 'Recipients' tab, or click on the tab.

3.6.2 Recipients

Recipients can comprise one or more Groups combined with records selected individually from CCM users, individuals or key workers.

Start typing in the name of the individuals you wish to send a message to and a drop-down will appear with possible matches within the system.

Groups Recipients Message		
Select/View Recipients		
		- Show/Hide Recipient Help Information -
Enter 1st 3 chars of the Recipient's Nan	e: (NONE)	✓ Type: (ALL)
RECIPIENTS TO:	(NONE)	
Name Address	INDIVIDUAL - Dummy Child Record :(No Email)(No Mobile) C033556 INDIVIDUAL - Dummy Record :(No Email)(No Mobile) R033555	I E T In Group
C033556 Dummy Child 4 North Lond Record 1NP	n Business Park, London, N11 11 Nov 2008	Individual 🔗
*		• · · ·
Back Next		

Click 'Next' and you will be taken to the 'Message' tab (see section 3.4.3)

3.6.3 Message

Once you have selected either a group or an individual to send a message to the message can be written on this page.

Messaging	
Groups Recipients Message	
Send Message	
	Show// lide Measage Liele Information
Additional Internal	- Snowmide Message Help Information -
(Please type in any any KeyWorkers Names to include in an internal message, seperate with ',' eg 'Jon Paul;Andy Smith;'):	
Additional Emails	
(Please type in any additional Email addresses to include, seperate with ",' eg "johnsmith@hotmail.com;tredbloggs@hotmail.com;"):	
Additional SMS	
(Please type in any additional Mobile numbers to include in SMS message, seperate with ',' eg '345235326;23636236;32332636;):	
Title:	
Nessane.	
message.	A
	*
Hannen (NIOTarit, marimum 400 abara): (One Trem Hair Hannen 0) 🖘	
Num chars remaining - 160	
	×
	-
Expires On	
	Messages Send
Back	

Best practice when sending messages:

- Always copy and paste in your email signature when sending messages via CCM
- Always include an opt-out statement (please refer to appendix 1 for guidance)
- Always include an email subject (recorded in the title field)
- Include a link to your activity timetable on Barnet Online.

3.7. Messages tab within the individuals record

This tab enables you to see messages sent to an individual within a date range that defaults to the last six months.

ne unitaren s tentre Ha	nager			Us	ier Name 2 S	ysAdmin	Site : Site 1				
DME 4	HOME >> SEARCH PEOP	LE>> IND	IVIDUAL R	ULL DELAIL	5						
earch 💁											
Family	Individual Full Detai	15	~								
People	NAME: Miss Ja DATE OF BIRTH: 26/02/	de Samuel 1998	s								
Add Family Wizard Advanced Search	START DATE: 01/01/ ID: SAM01: ADDRESS: 36 Field OPEN CASES: NONE	2001 62 Iside View,	.Eastbourn	1e,8C21 2L	Z, (Outside S	iureStart)					
Anil Marca	Requirements Atten	dances	Referrais	Health	Custom M	Vationality					
Data Extract	Individual Personal Details	Notes (Th	hid Adut	Relationshi	ns Rarcodes	Messages					
		20 1101 20			Text Course		01 2011 1012		1122		
	From: Messages - Any messa	(ALL) SysAdn	min the individu	al based on	the Message Fi	iter critera	Refresh				
	From: Messages - Any messa Title	(ALL) SysAdn	min the individu	al based on	the Message Fi	iter critera	Refresh Created	Sent By	Message		
	From: Messages - Any messa Title 6 Test message	ges sent to Hi	min the individu escription Jade, Pleas (eb Msg	al based on e confirm re From: SysA	the Message Fi	iter ortera essage. COM	Refresh Created On 31/05/2013 11:54:19	Sent By SysAdmin	Message Type Emai	-	
tendance Q	From: Messages - Any messa Title 6 Test message	G (ALL) SysAdn ges sent to Hi W	nin the individu escription Jade, Pleas Jeb Msg	al based on e confirm re From: SysA	the Message Fi	iter orteria essage. CCM	Refresh Created On 31/05/2013 11:54:19	Sent By SysAdmin	Message Type Emai	*	
tendance S	From: Messages - Any messa Title 6 Test message	es sent to	nin the individu escription Jade, Pleas reb Msg	al based on e confirm re From: SysA	the Message Fi	iter ortera essage. CCM	Refresh Created On 31/05/2013 11:54:19	Sent By SysAdmin	Message Type Emai		
tendance O sework b	From: Messages - Any messa Title: 6 Test message	C ALL SysAdn C G ges sent to Hi W	nin the individu escription Jade, Pleas leb Msg	al based on e confirm re From: SysA	cept of this madmin ====	iter ortera essage, COM	Refresh Created On 31/05/2013 11:54:19	Sent By SysAdmin	Message Type Emai		

The messages listed can be filtered by both date range and the sender. Press the 'Refresh' button to update the message display based on the modified filters.

Press the 'Send' button to create a new message to the selected individual.

LIGHT	mager	_	User Wathe 1	SysAumin Site Site	eı	_	_	_	_	_	_		
10ME 41	HESSAGENE												
earch 💁	Extended: 🗹												
Family	Groups	eopients	Message	_	_	_	_	-	-	-	_	-	
People	Select/Vie	ew Recipi	ients										
Add Family Wizard					_	_	_				_		
Advanced Search								- Show	v/Hide A	lecipier	nt Help Inform	ation -	
Service Providers	Enter 1st	3 chars of th	e Recipient's Name					Tyr	01 / 11				
Mail Merge Data Extract	RECIPIENTS	TO:							MEL	1	×.		
	-	Name	Address	E-mail	Mobile	DOB	Recipient	I	E		In	1	
		2-4	A Fully I was fault and post			DC Feb					Group		
	SAM0162	Samuels	36 Fieldside View, Eastbourne, BC21 2LZ	jsamuels@test.co.uk		26 Feb 1998	Individual			2	•		
iendance Q	Bark	Next											
iendance 🚫 isework 🝺	C Back	Next											
tendance Q seework o	Sack	Next											

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CCM messaging acceptable use policy

London Borough of Barnet

www.barnet.gov.uk

Policy name	CCM Messaging Acceptable Use Policy					
Document description	Policy standards for the behaviour of Children's Centres using the messaging functionality on CCM.					
Document author 1) Team and 2) Officer and contact details	1) Data Systems a 2) Lauren Burbidge ext 7606	nd Assurance Team e, <u>lauren.burbidge@</u>	ר פ <u>barnet.gov.uk</u> ,			
Status (Live/ Draft/ Withdrawn)	Live Version 1.0					
Last Review Date	November 2014	Next Review Due Date	April 2015			
Approval Chain	Paul Kennedy - Data Systems and Assurance Manager	Date Approved	November 2014			

Version Control

(see the "Version Control and Naming Convention Guide" for details of how to complete this table using the council's preferred version control system)

Version number	Date	Author	Reason for New Version
1.0	November 2014	Lauren Burbidge	

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	3.2.3.	Consent for messaging	3
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1. Introduction

The CCM Messaging Acceptable Use Policy covers all communications (internal and external) undertaken using the CCM messaging facility. This includes but is not limited to:

- emails/text messages to children's centre service users
- emails/text messages to key workers or service providers
- internal messaging between CCM users.

This policy should be read in conjunction with the CCM Framework and Data Guidance documents.

This document outlines the expectations placed on children's centres in relation to their use of the CCM messaging functionality. The underlying philosophy is that the CCM messaging functionality should be used in a manner which is ethical, legal, and appropriate to children's centre aims. Message usage should not breach privacy laws, nor cause nuisance or distress to recipients.

It is important that children's centres have a clear understanding of the expectations that the local authority places on them and the standards to which they are expected to work.

2. Access to CCM messaging

No one may use CCM messaging without a valid CCM login. Please refer to section 2 of the CCM Framework for details on access for new users.

CCM users are given access to the messaging functionality if it is appropriate to their role. Managers must notify CCM Support of any change in staff duties which may affect their access and right to use the CCM messaging functionality.

3. The use of CCM messaging

3.1. CCM messaging

The CCM messaging functionality enables the sending and receipt of internal messages (via the CCM database) and external messages (via email and text).

Messaging enables communication between key workers, and that are involved with in terms of attendance sessions, referrals or casework. The system also enables adhoc email addresses and text details to be entered manually as message recipients.

The CCM messaging functionality includes the ability to create groups comprising a mixture of individuals, key workers who are linked to CCM users and key workers who are not CCM users.

Key workers who are not CCM users cannot receive internal messages as they have no access to the CCM database, but they can be included as email or text recipients.

3.2. Privacy and Electronic Communications Regulations and the Data Protection Act

When using CCM messaging, centres must comply with both the Data Protection Act 1998 (DPA) and the Privacy and Electronic Communications Regulations 2003 (PECR)₁.

3.2.1. Privacy and Electronic Communications Regulations

When sending direct marketing by electronic means, centres must always comply with the PECR.

The PECR is a law which makes it unlawful for you to send direct marketing to someone who has not specifically granted permission for you to do so via an opt-in agreement. You should not assume consent.

The PECR applies to all electronic communications, such as by telephone, fax, email, text, picture or video message, or by using an automated calling system.

Centres must immediately stop sending marketing messages to any person who objects or opts out of receiving them.

3.2.2. Data Protection Act

Section 11 of the DPA also gives individuals the right to prevent their personal data being processed for direct marketing. An individual can, at any time, give written notice to stop (or not to begin) using their details for direct marketing. In other words, centres must stop any marketing directed at a particular individual if that person writes and asks them to stop. The centre does not have to reply, but it is good practice to acknowledge the request and confirm that the marketing will stop. Any

¹ Information Commissioners Office: <u>http://ico.org.uk/what_we_cover/legislation</u> © Copyright London Borough of Barnet 2014

requests of this nature must also be highlighted with the corporate Information Management Team for logging. These can be directed to <u>data.protection@barnet.gov.uk</u>

Much of the information held on CCM is confidential and must not be disclosed to other parties unless there is a clear legal basis to do so. Children's Centre Managers have a responsibility to safeguard the security of the electronic messages sent using CCM.

If personal data is accidentally lost, altered or disclosed, or someone accesses it or passes it on without proper authorisation, you need to notify CCM Support and the corporate IMT as per the council's Security and Data Incident Reporting Policy. CCM and IMT will offer further advice on what steps you need to take. Ensure you keep your own internal log of these incidents if and when they occur

Should CCM users be in any doubt about using CCM messaging or disclosing information, then they should seek advice from their manager. In addition, if CCM users are in doubt about whether an action might constitute unacceptable use, they should consult CCM Support. Please refer to section 3.4 on unacceptable use.

Further information about DPA can be found in section 3.2 of the CCM Framework.

3.2.3. Consent for messaging

The children's centre registration form states that once families are registered on our system (CCM) their details will be used to contact them. By completing the form, the family has provided consent.

Centres should keep clear records of what an individual has consented to, and when and how this consent was obtained, so that you can demonstrate compliance in the event of a complaint.

Where an individual has opted out of receiving marketing information, you must retain a clear audit trail of this notification to ensure they do not receive further information.

Consent to receive messages is captured on CCM in the individual's record. Please refer to section 3.1 of the CCM barcoding and messaging guidance document for further information.

3.3. Acceptable use

Centres should follow the below guidelines when using the CCM messaging functionality. This guidance is provided in addition to the councils Acceptable Use Policy:

Marketing messages

- Only send marketing texts or emails about activities or services that the family has expressed an interest in (this information is collected in section 9 of the registration form).
- Marketing texts/emails should only be sent to individuals living in the children's centre reach area.
- All marketing messages must include details of how to opt out of receiving future messages.

Changes to sessions

• Texts and emails should be sent to inform individuals of changes to sessions i.e. time changes, cancellations etc.

Messaging between users

• Messaging between CCM users must be in relation to information held on CCM.

Please note: all CCM support calls must be logged by email to <u>ccm.support@barnet.gov.uk</u> and not using CCM messaging.

The use of CCM messaging is intended for business reasons only.

3.4. Unacceptable use

Unacceptable behaviour in relation to the use of CCM messaging will not be tolerated and where it is identified a range of informal and formal routes may be followed. These include withdrawal of system access.

CCM users using the messaging functionality are expected to comply with the conditions of use which include the following.

Sending reminders

• CCM should not be used to send reminders about everyday sessions i.e. stay and play.

Requesting personal information

• CCM messaging should not be used to request personal information from individuals. For example, ethnicity, language etc.

Personal use

 Personal use of the CCM messaging functionality is not acceptable. Monitoring of individual usage of CCM messaging will not be undertaken as a matter of course. However, this may be necessary when concerns arise about the level or nature of personal use of the systems. Withdrawal of access from the system may be considered appropriate in such circumstances.

Consent

• Children's centres must not send marketing texts or emails to individuals without their specific prior consent. This relates to new birth families in particular who have not yet registered with the centre.

Some forms of behaviour will always be considered to fall below the standard of acceptability. These include:

- the use of inappropriate language in communications
- sending inappropriate messages including those which are discriminatory, sexually harassing or offensive to others on the grounds of race, age, disability, gender, religion or sexual orientation
- the sending of potentially defamatory messages which criticise other individuals or organisations (legally email is classified as a form of publication, governed by the rules of disclosure, libel and employment law)
- forwarding confidential, sensitive or personal information onto third parties without gaining appropriate consent
- overloading the system by sending inappropriate bulk messages
- sending messages which are rude, overbearing, aggressive or bullying.

4. Monitoring CCM messages

Monitoring of individual usage of CCM messaging will not be undertaken as a matter of course. However, this may be necessary when concerns arise.

Withdrawal of access from the system may be considered appropriate in some circumstances.

4.1. CCM audits

CCM audits can take place at any time and will be undertaken by the Early Years Team and/or the Data Systems and Assurance Team. The lead officer for the audit will ensure compliance with this policy as well as the CCM Framework, DPA and PECR.

For further information about CCM audits please refer to section 4 of the CCM Framework.

5. Monitoring CCM messages

5.1. Best practice

Emails and text messages can be used for different types of communication and can constitute a formal record of proceedings.

The types of communication which email and text messages can be used for include general business discussions, disseminating information, agreement to proceed and confirmation of decisions made.

Although email and text messages can be used for these types of communication, it may be necessary to consider whether the sensitivity of the information would be more appropriately communicated in a different way.

Dealing with sensitive subjects in email and text messages is addressed in more detail below. It should also be noted that there are certain subjects that should be avoided in email and text messages as they could be construed as discriminatory; this is covered in more detail in the section on email misuse.

5.2. Opt-outs

All emails and text messages sent must include an opt-out of receiving future promotional messages.

Suggested text to use in emails:

You may unsubscribe to children's centre communications by responding 'STOP' or 'STOP keyword' to this email.

Example: Respond to this email with the words "STOP CHILDCARE" to opt-out and stop all future messages about childcare. To remove yourself from all campaigns, respond STOP ALL to this email.

5.3. Dealing with sensitive subjects

The privacy and confidentiality of the messages sent via CCM cannot be guaranteed.

CCM should not be used to send information of a sensitive nature.

Sensitive information can include information about specific individuals, groups or activities.

It is the responsibility of all users to exercise their judgement about the appropriateness of using CCM to send messages when dealing with sensitive subjects.

All employees, Council Members, and partner organisations (suppliers and contractors) that have access to council systems or to personal data held by or on behalf of the council are responsible for ensuring that no security breaches occur as a result of their actions. Everyone must be aware of their responsibility to report any potential, suspected or actual data security incidents to CCM Support and <u>data.protection@barnet.gov.uk</u>.

Appendix 2: CCM barcoding and messaging FAQs

Barcoding

Q: Are barcodes automatically assigned to individuals when they are first registered on CCM?

A: No, this is done by CCM Support at least every 2 working days.

Q: Does the barcode scanner automatically update CCM?

A: No, data collected using the barcode scanner has to be downloaded using the CCM barcode logger application, and then uploaded in to CCM. Please refer to sections 2.7 and 2.8 of the guidance for details on how to carry out this process.

Q: Does the barcode scanner hold any sensitive data?

A: No, the barcode scanner only holds the barcode i.e. the individual or session identifier. Until this has been loaded into CCM individuals cannot be identified with the data collected by the scanner.

Q: If I lose the barcode scanner will I lose all of the attendances it has recorded?

A: Yes, the data collected on the scanner does not automatically load on to CCM; this has to be done manually.

Q: How often should I load data from the barcode scanner in to CCM?

A: Ideally this should be done every day, but it should never be longer than 3 working days.

Q: Do we still need to use a sign-in sheet if we are using barcoding?

A: We would advise you to continue to use a sign in sheet in case individuals are attending the centre for the first time and do not have a membership card, or for people that have forgotten their membership card. Appendix 3 is an example sign in sheet that can be used. We would suggest having a tick box to record if the attendees have a membership card or not, so that you can quickly see who needs to be added on to CCM manually.

Q: If there is a fire can we quickly print the list of attendees from the scanner?

A: No, in the case of a fire we do not advise that this should be done. We would suggest that you keep a sign-in sheet in case of emergencies (see above question).

Q: How often should we produce membership cards for newly registered families?

A: We would suggest producing membership cards for all newly registered families at the end of each week.

Q: When should we input session details to produce session lists?

A: We would advise setting up all sessions for the coming week on a Friday.

Messaging

Q: Who can see message groups that I have created?

A: All CCM users can see any groups that have been created on the system regardless of the centre they are logged in as.

Q: Can email recipients see the email addresses of all other recipients?

A: No, all recipients are blind copied into emails.

Q: Can I send attachments with emails?

A: No, CCM does not allow for attachments to be sent with emails. If you would like to send copies of your timetable with emails you could send the link to your timetable on Barnet Online.

Q: How do I know if we have consent to send messages to families?

A: Consent for messaging is stored on the individual's record in the personal details tab in a box called 'non CC mailshots'. When creating messaging groups using the mail merge data extract or the attendance review, 'non CC mailshots' must be selected as a parameter.

Q: If someone opts out of receiving messages how do I record this?

A: To remove consent from an individual or family record you should un-tick the consent to non CC mailshots for each individual family member. You can also add an extended note to the individual's record to keep a record of this.

Q: If an email sent through CCM bounces back, where does it go?

A: The bounce back email will return to the CCM user who sent the email via their Outlook account.

Q: If someone responds to a CCM email, where does it go?

A: The response will return to the CCM user who sent the email via their Outlook account.

Appendix 3: Suggested sign in sheet template

Session name	
Session date	
Session location	
Key worker(s)	

Nama	Destanda	Membership card				
indille	FUSICOUE	Yes	No			