Education and Young People's Services

Early Help and
Preventative Services

Thrive Guidance for Commissioned Services

Document Owner	Claire Webber
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Section Title	Page

A. Thrive Acceptable Use Policy

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Thrive Acceptable Use Policy

Introduction
Thrive is a secure location to place and communicate confidential information where privacy is vital. Confidential information includes all information relating to county business. If you are in doubt as to what information may be disclosed, you should check with your line manager.

This Acceptable Use Policy (AUP) sets out a few basic principles for your use of the Thrive system and the information that it holds.

You will be made aware of any changes to this policy as they occur.

Registration
You will only be given access to Thrive after your identity and authority have been verified, a DBS check has been conducted and you have confirmed your understanding and abidance to this Acceptable Use Policy. Your DBS should be renewed every three years.

Basic Principles
Thrive is provided solely for the purpose of communicating your work documents in a secure environment. It is not to be used to comment on personal interests you may have outside of your professional interests and your working life. Kent County Council (KCC) values trust and responsibility in all relationships, and expects you to exercise personal responsibility when you place documents on Thrive.

If you are reported as having breached the AUP, this may result in disciplinary action and could result in termination of employment. KCC reserves the right to report any illegal or criminal violations to the appropriate authorities.

Where the administrator receives a complaint about a particular piece of information, they have the final say in deciding whether it should be removed or edited. The administrator reserves the right to remove any information without warning.

Do:
- be particularly careful to secure access to the network by using your password when working away from your office
- adopt a responsible approach to the content of documents you place on Thrive
- respect copyright and/or intellectual property rights. If you reproduce material from elsewhere then you must reference the source
- log out of Thrive and invoke the PC's screen-saver/lock-out mechanism if you are leaving your computer unattended
- always log out of Thrive and close the browser page when you have finished using the system

Do Not:
- share your password with anyone – not even the Thrive administrator
- store KCC data on portable devices such as USB memory sticks, Laptops, Mobile Phones
  unless the device is fully encrypted as part of y our organisations security policy.
- store personal data on the system unless the storage is covered by KCC's data

protection registration under the Data Protection Act 1998

- allow members of your family or any unauthorised person to use the KCC network or KCC equipment
- display confidential information on the screen of your laptop at any time where it may be visible to others
- place on Thrive material that is defamatory or intended to offend, annoy, harass or intimidate another person or persons. This includes ethnic slurs, racist comments, personal insults, obscene/indecent words or suggestions; and be careful of sensitive topics such as politics or religion
- entice or encourage other users to post such material either, or respond to comments or posts in a way that may provoke aggressive responses
- place on the Thrive material that gives strong personal or political opinions, which may be misconstrued as being representative of your employer's policy or strategy

Your Responsibilities

- you are responsible for the content of the documents you place on Thrive and you have the ability to moderate any information as necessary
- You should report breaches of this AUP to the administrator, who may withdraw access to the secure area and/or report such incidents to the offender's line manager

Passwords

Passwords are crucial to the security of the information and are a first line barrier against unauthorised access, so the longer and more complex they are and the more frequently changed, the better. Given the sensitivity and confidentiality of the information that is to be placed on Thrive, strong/complex passwords are used.

- A password should be a minimum of 6 Characters in Length
- A Password MUST contain at least 3 out of the 4 different Character Type requirements
    - An Upper case letter
    - A lower case letter
    - A number
    - A special character such as ~ ! @ # $ % ^ & * _ - + = ` | \ ( ) [ ] { } : ; " ' < > , . ?/
- Passwords cannot contain the username or parts of the username that exceed two consecutive characters e.g. if your account name or full name is 'jamas' then your password can contain 'ja' but not 'jam'
- Each time a user updates their password it should be unique to ensure your account is kept secure e.g. no sequential passwords after a change so you cannot use 'Password01' then 'Password02'
- Passwords should be changed every 30 days to ensure they remain secure

I have read, understood and will comply with this Acceptable Use Policy	**Name (print name):**
Signed:	
Date:	

B. Guidance on accessing Thrive for the first time

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Webber, Claire - EY PS

Guidance on accessing Thrive for the first time

Thrive is the system that Kent Early Help and Preventative Services use to securely store and share case information with Early Help commissioned services.

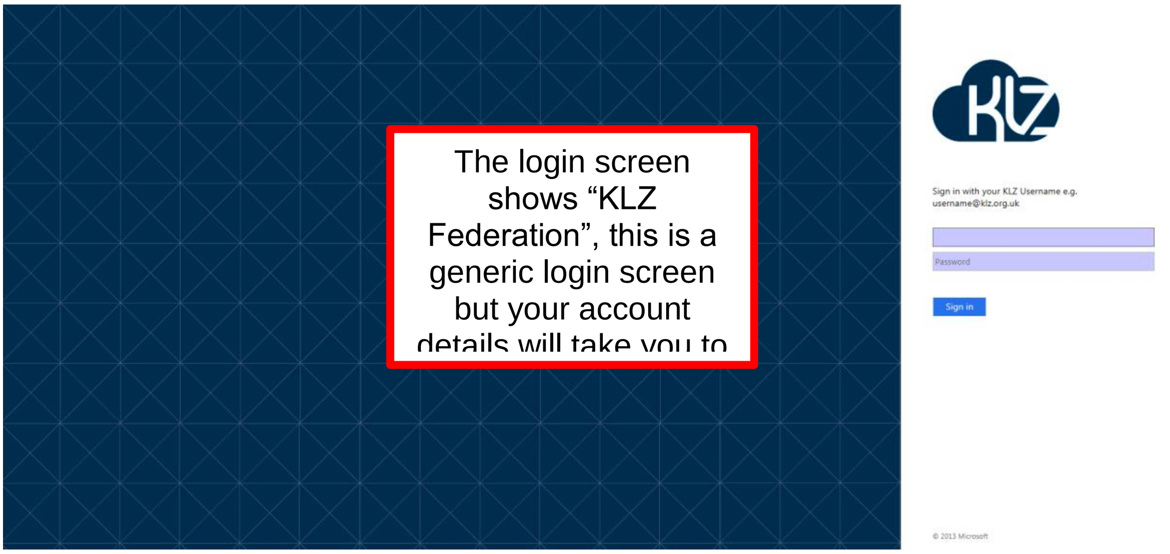
Before you start

1) When you are issued with your Thrive login details the first thing you **must** do is setup Self-service. Self-service will ask you to setup security questions that will allow you to reset your own password if you ever forget it and when prompted by the system to do so.
2) If you ever experience password issues you will be directed to Self-Service in the first instance, so it is critical you complete this setup.
3) Using self-service reset the temporary password you have been issued to something only you know. Your password must meet the minimum security requirements as outlined in the KCC Acceptable Use Policy.

Guidance on using the self-service tool can be found here.

Logging in

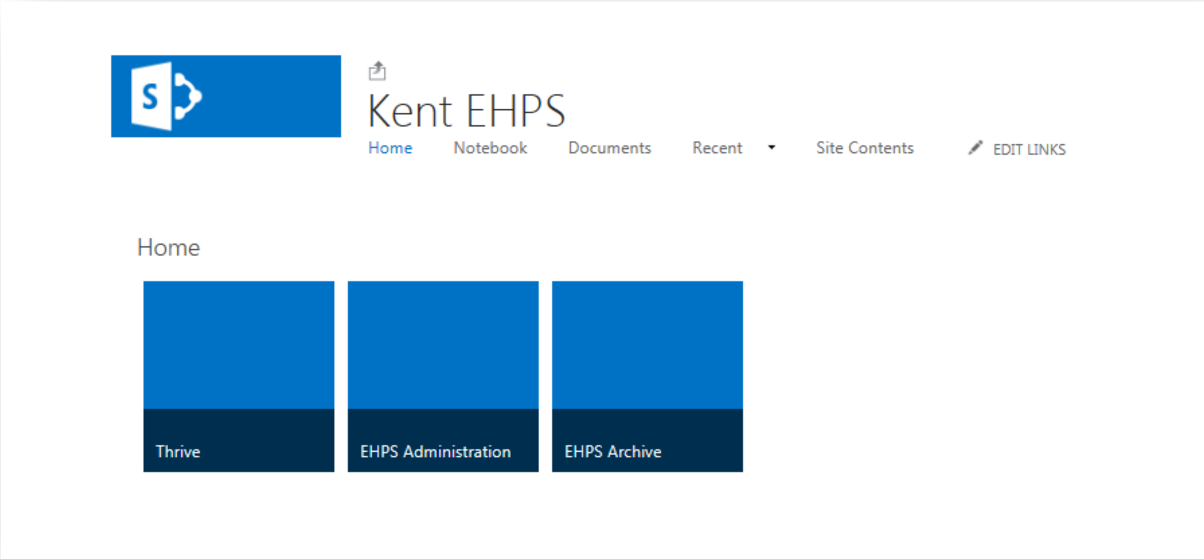
To login into Thrive simply open a web browser and navigate to www.kentehps.org.uk
You will be presented with a login screen as shown below:



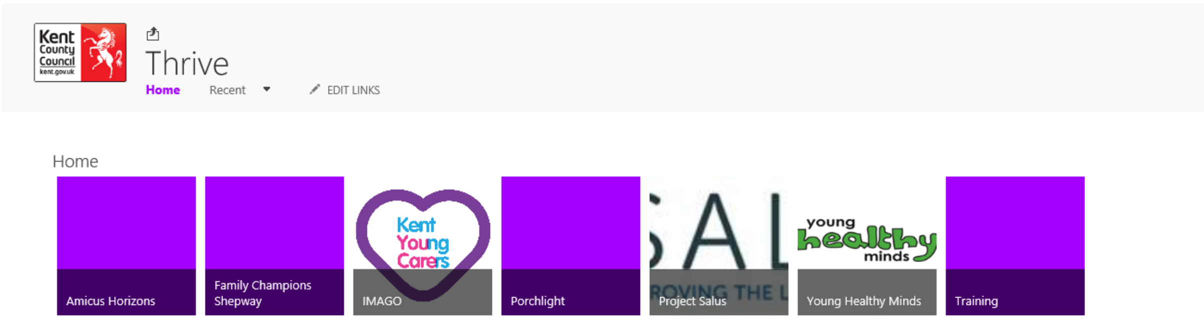
Please enter your Thrive username and the password you created in the self-service tool.

Note – @klz.org.uk must always be entered in the username field e.g. blogsj01@klz.org.uk

Now Select Thrive



Now select your service (you will not be able to access any other service)



C. A Guide to Setting up and using the Password Self-Service Tool

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Webber, Claire - EY PS

A Guide to Setting up and using the Password Self-Service Tool

Please read:

It is **vital** you set-up your self-service password reset account and reset your temporary password for Thrive as soon as you are issued with Thrive login details. This will enable you to change your password when you get expiry notices or if you forget your password. To keep the information in Thrive safe you will be prompted to reset your password every 30 days.

Please remember there is no helpdesk facility for Thrive so passwords need to be managed by the user and only technical issues should be escalated. Your manager will be contacted if your self-service tool is not set up within two weeks of your account details being issued.

This guide takes you through how to setup Thrive self-service, how to use self-service to reset your Thrive password and what to do if you have forgotten your password. There is also a trouble shooting guide, please refer to this if you have any difficulty using the self-service tool.

Section Title **Page**

1. Introduction to the Self-Service

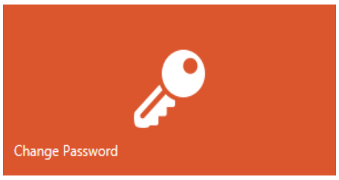
Home button takes you to the front page of the self-service tool

Logon button to access your self-service account

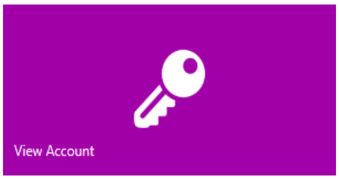
Allows you to reset a forgotten password

Log out of self-service tool button

Allows you to reset a forgotten or expired password. You must have already set up your security questions to use this facility



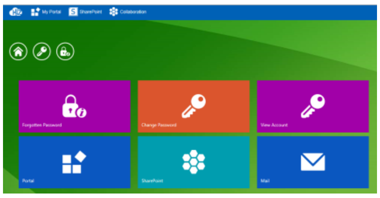
Allows you to change your password when you receive an expiry notice or if you think the security of your password has been compromised. You will be directed to log in using your current username and password to use this facility



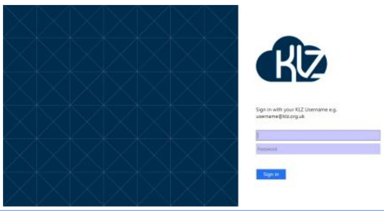
Logon button to access your self-service account

Do not click on buttons marked "not for Thrive use"

Remember: the self-service tool is separate to Thrive, once you have set your security questions and/or changed your password you must log out of the self-service tool, close the browser page and open Thrive using the correct web address.



The Self-Service tool is used for changing and resetting passwords only: http://selfservice.klz.org.uk



Thrive is a different web address and contains Commissioned Service case information, EHPS tracker and GP referral information www.kentehps.org.uk

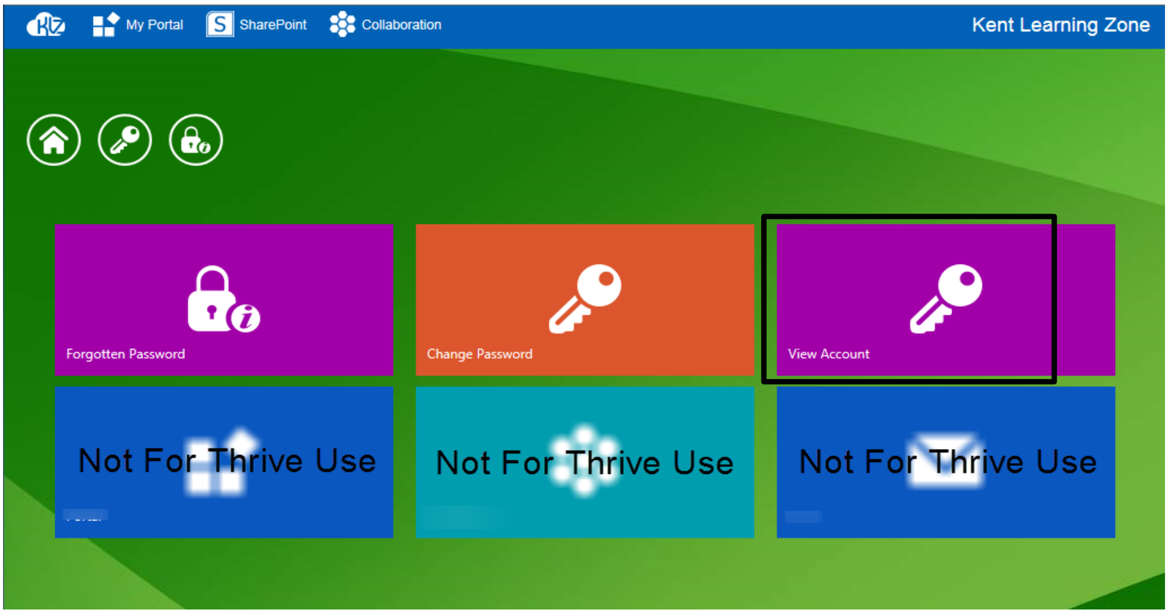
2. How to Setup Self-Service

You <u>must</u> set up self-service <u>before</u> logging into Thrive for the first time

Self-service is a tool which allows Thrive users to change or reset their own password. To change an expired or forgotten password, users will be asked to verify their identity by answering security questions. These memorable questions and answers must be set up by the user as soon as they are issued an account for Thrive.

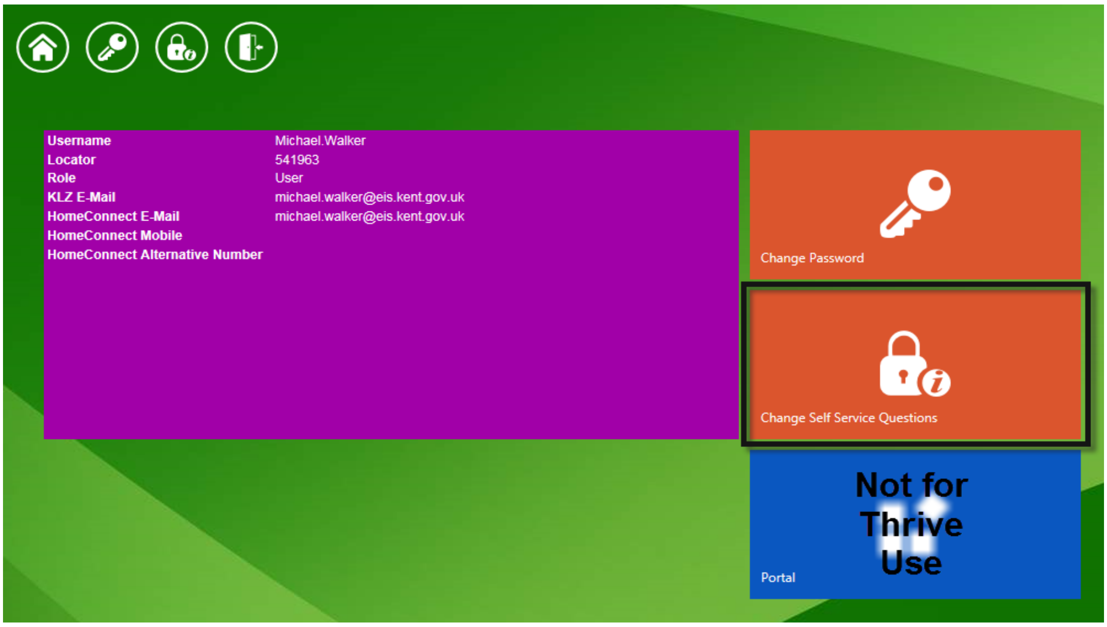
To setup security questions:

1. Go to: http://selfservice.klz.org.uk and select the 'View Account' tile

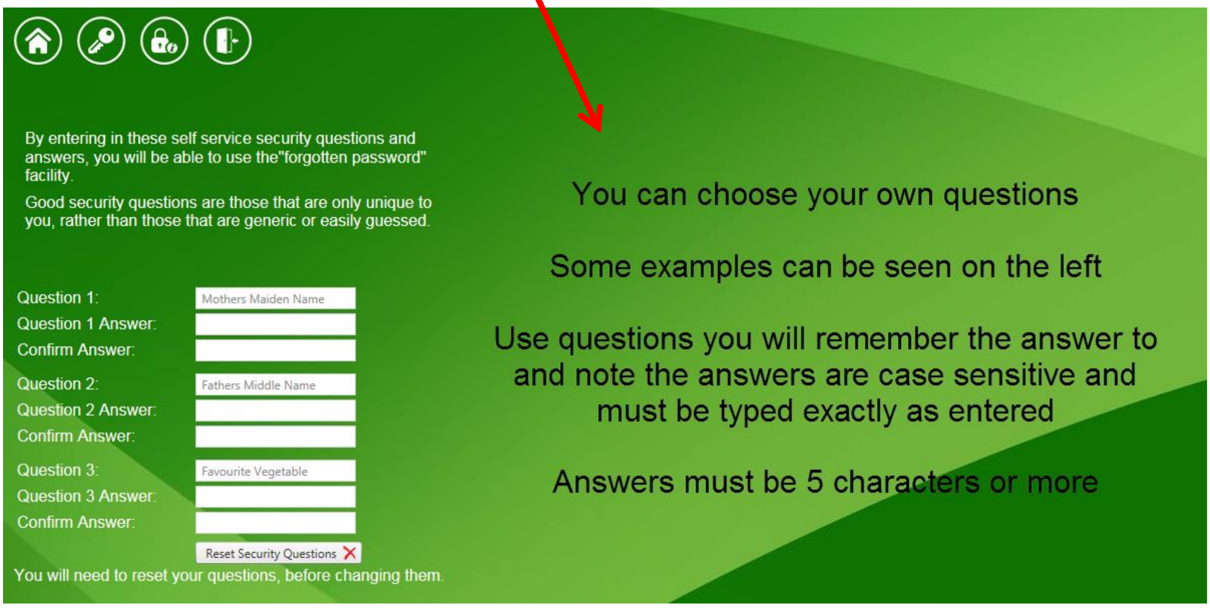


2. Enter your Thrive account name and password (do **not** include @klz.org.uk in you user name when logging into the self-service tool)

3. Select the ‘Change Self-Service Questions’ button



4. Enter three questions and answers. The questions can be anything that you **can remember** but answers should not be guessable by your friends or colleagues. Your password is protecting sensitive and restricted information. Read the tips on the screen shot below.



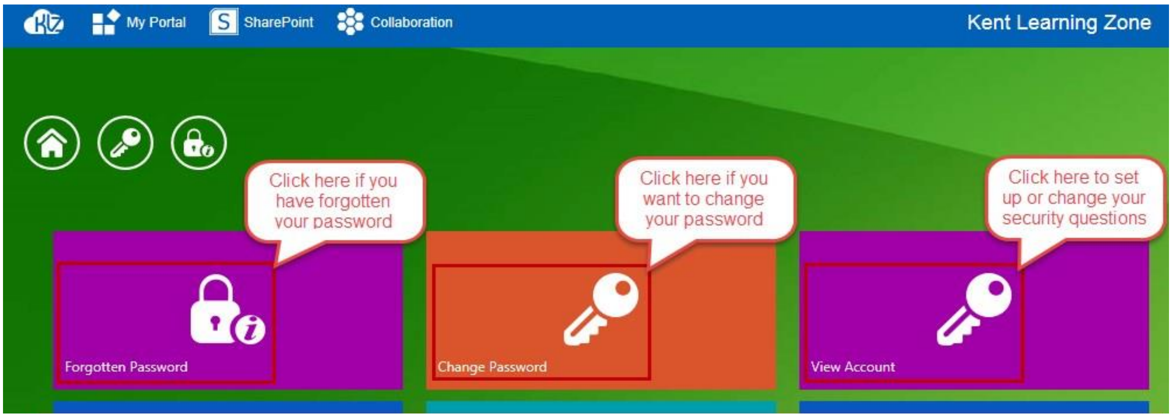
Now proceed to step three and change your password

3. How to Use Self-Service to change your Thrive password

This option allows you to change your current password. If you suspect that your account may have been compromised or if you receive an expiry warning then you **must change your password immediately**. We recommend you change your password on a regular basis for added security do not wait until your final expiry warning.

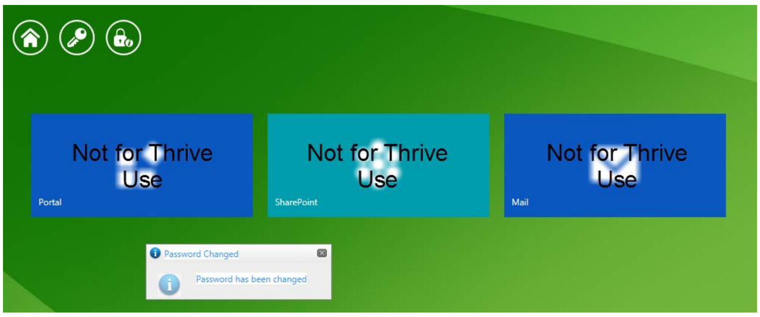
1. Go to: http://selfservice.klz.org.uk and select the ‘Change Password’ button.

2. Enter your current username and password and click the arrow. **Please note**: if your password has expired please use the “forgotten Password” option.



3. Enter your current password into the old password cell and a new password (confirming by re-entering as prompted), click save once you are happy with the new password. See the trouble shooting guidance for the required password format.

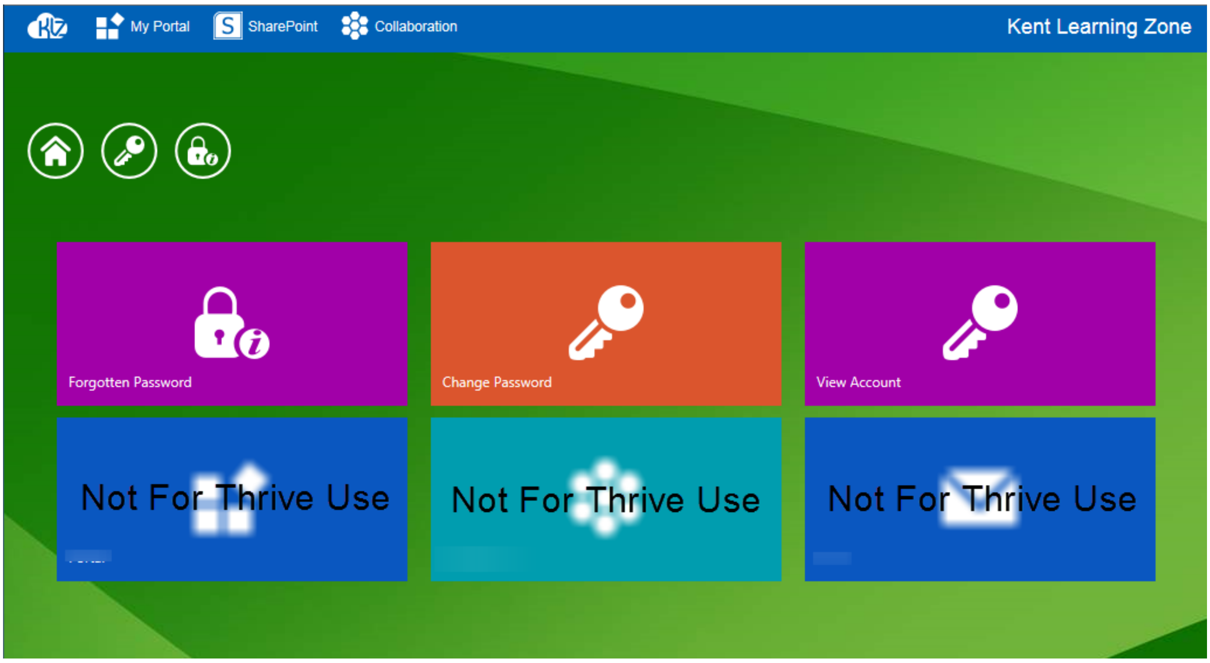
4. You will then see the screen below, now shut the self-service tool and enter the Thrive web address: www.kentehps.org.uk to log into Thrive with your new password.



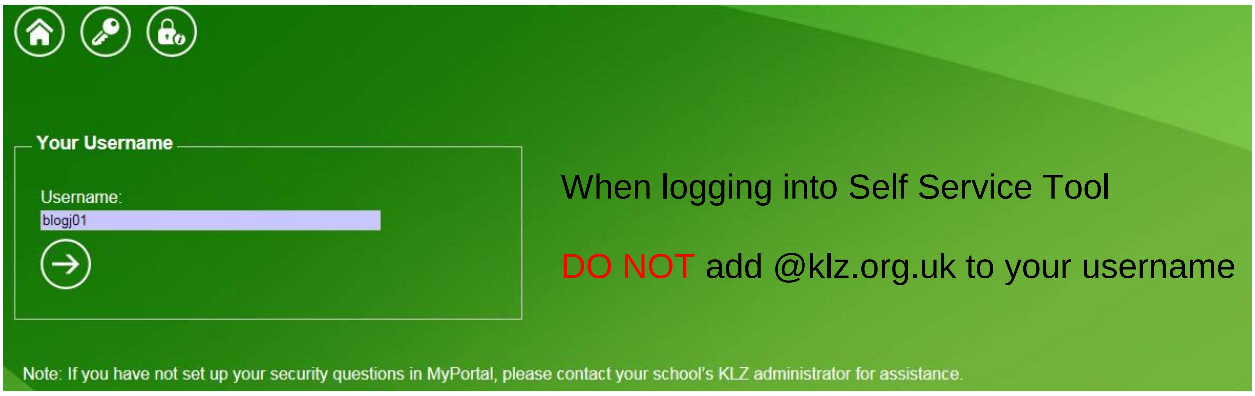
Do not click any of the blue buttons shown below, you do not have access to these areas.

4. How to Use Self-Service to reset your forgotten or expired Thrive password

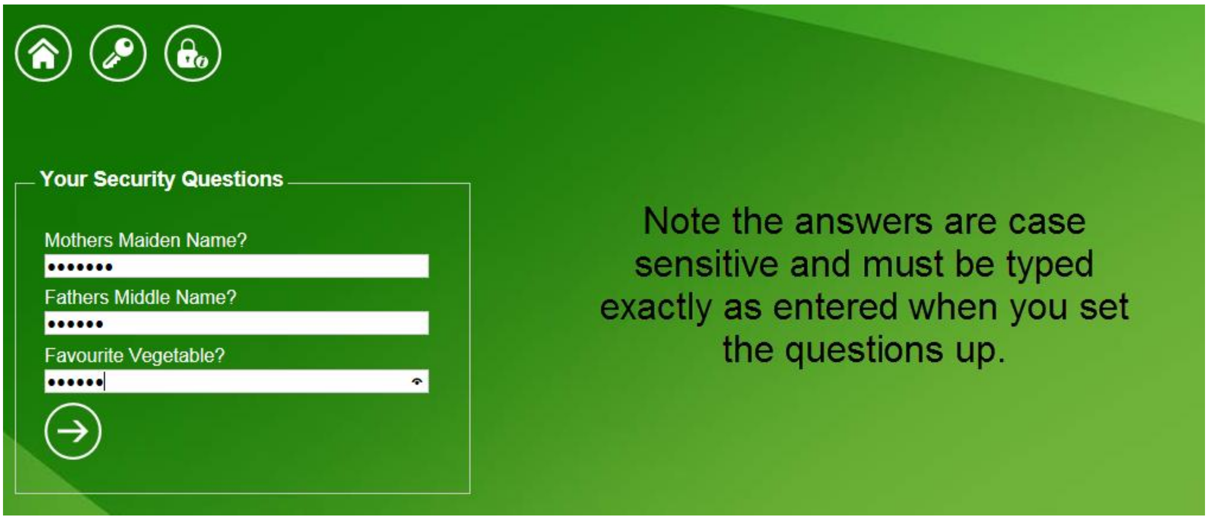
http://selfservice.klz.org.uk



1. Enter your account name and you will be prompted for the answers to your security questions. Do **not** include KLZ\ in you user name when logging into the self-service tool

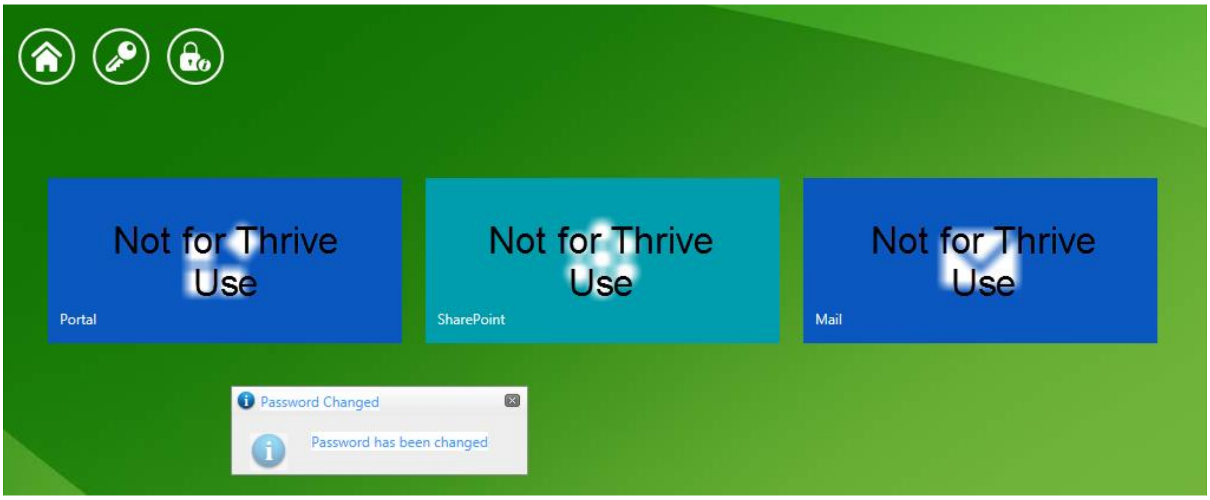


2. Enter the answers to your security questions, **remember:** they are case sensitive and must be entered exactly as you did when setting them up.



3. Enter a new password as prompted; make sure that it meets the password requirements outlined in the trouble shooting guidance below.

4. The following screen will appear confirming your change of password. DO NOT click on the blue buttons, these are not for Thrive use.

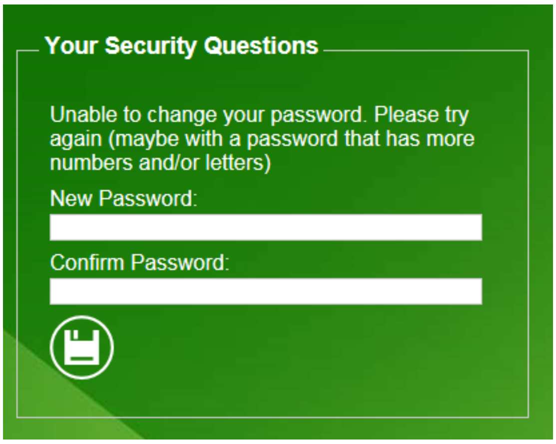


5. Shut the self-service tool and enter the Thrive web address: www.kentehps.org.uk to log into Thrive with your new password.

5. Trouble-shooting guidance

1. I'm trying to reset my forgotten or expired password, how do I do this?
Use the "forgotten password" option and follow on screen instructions, referring to step 4 for guidance. You will not be able to change an expired password using the "change password" function.

2. I have entered my security questions and new password but I keep getting this message:

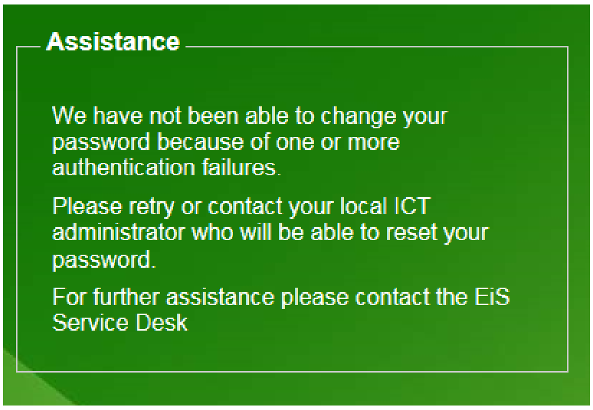


If you are seeing this message your password does not meet the required password format. See password requirements at 3 below

3. What format should my password be?
Passwords are crucial to the security of the information and are a first line barrier against unauthorised access, so the longer and more complex they are and the more frequently changed, the better. Given the sensitivity and confidentiality of the information that is to be placed on Thrive, strong/complex passwords are used.

- A password should be a minimum of 6 Characters in Length
- A Password MUST contain at least 3 out of the 4 different Character Type requirements
  - An Upper case letter
  - A lower case letter
  - A number
  - A special character such as ~ ! @ # $ % ^ & * _ - + = ` | \ ( ) [ ] { } : ; " ' < > , . ?/
- Passwords cannot contain the username or parts of the username that exceed two consecutive characters e.g. if your account name or full name is 'jamas' then your password can contain 'ja' but not 'jam'
- Each time a user updates their password it should be unique to ensure your account is kept secure e.g. no sequential passwords after a change so you cannot use 'Password01' then 'Password02'
- Passwords should be changed every 30 days to ensure they remain secure

4. I have entered my security questions and new password but I keep getting this message:



If you are seeing this screen you have entered one or more of your security answers incorrectly. Click the home button, select forgotten password and re-enter your answers. Remember they are case sensitive and need to be entered exactly as you did when creating them.

If you cannot remember the answers to your questions following several attempts please use the following form to log a call, this must be completed and submitted by your manager.

5. I am trying to reset my forgotten/expired password but I don't recognise the security questions I am being asked. There could be two reasons for this.

- You may have included KLZ\ in your user name when logging into the self-service tool. Please close the webpage, re-open the self-service tool login page (http://selfservice.klz.org.uk) and enter your username **without** KLZ\.

or

- You have not set up your self-service account. If this is the case you will need to use the following form to log a call, this must be completed and submitted by your manager.

6. I have changed my password and logged in but I am not seeing Thrive
You have clicked on one of the blue buttons in the self-service tool and have logged into the Kent Learning Zone, this is not Thrive. Shut this page and enter the Thrive web address: www.kentehps.org.uk log in using your user name and new password.

Please avoid clicking on the blue buttons next time you use the self-service tool.

KENT COUNTY COUNCIL

D. Guidance for Commissioned Service Workers

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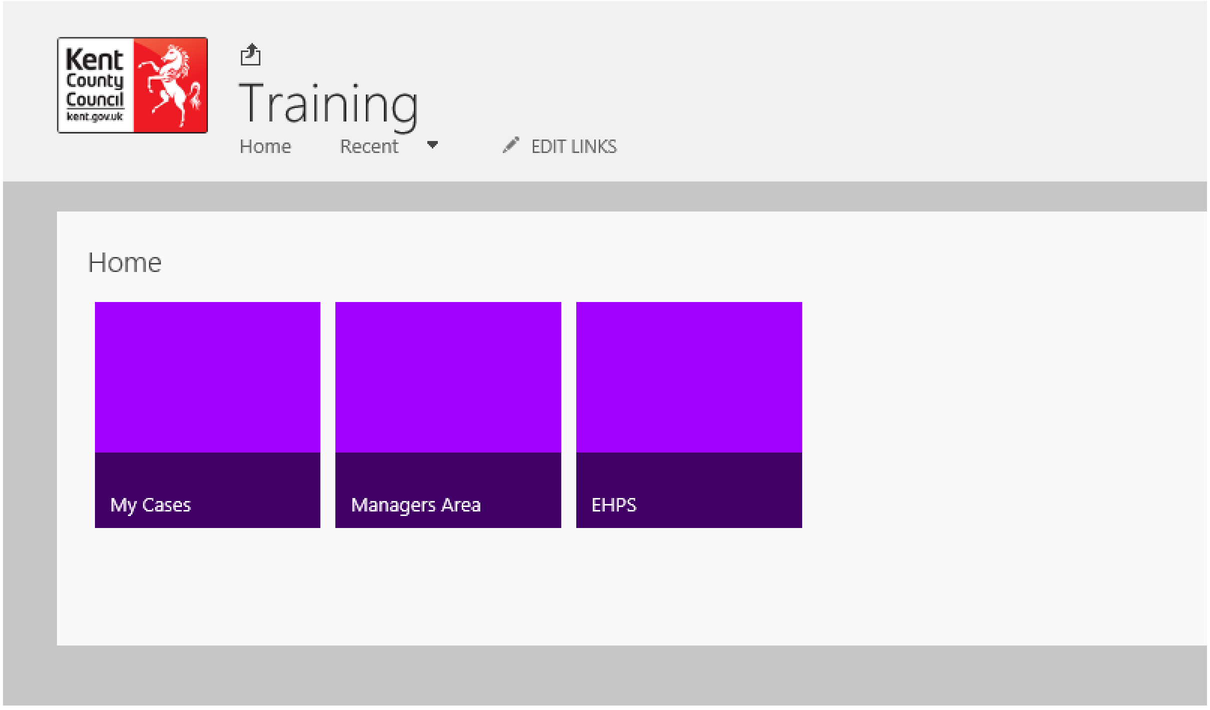
Webber, Claire - EY PS

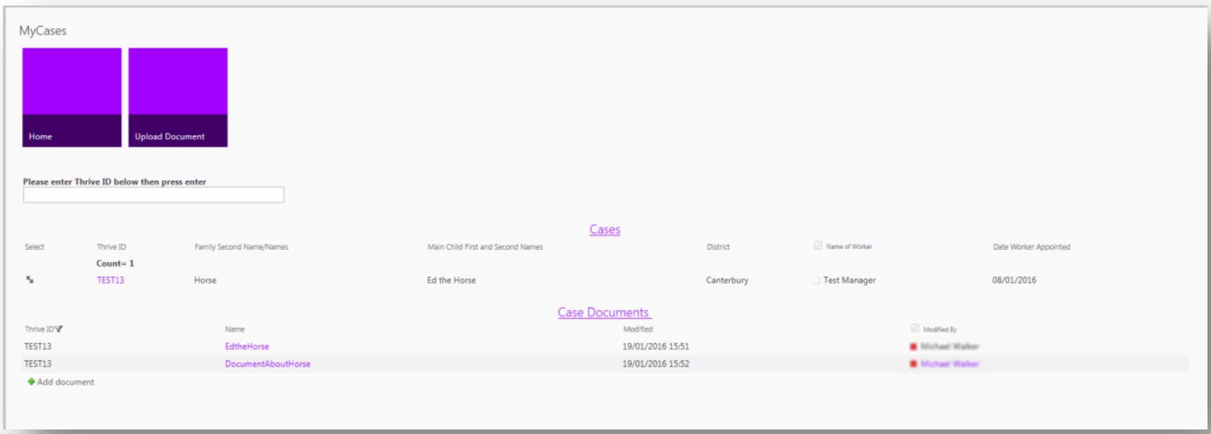
Guidance for Commissioned Service Workers

My Cases



Click on ‘My Cases’. On this page you will see the following

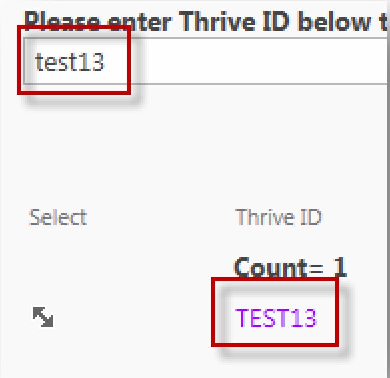
- Two Buttons (Home and Upload Document) and a filter box
- Cases
- Case Documents



Two Buttons and Filter

The home button will take you back to your commissioned service homepage
The upload button is covered later

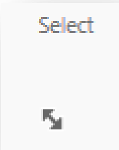
The case filter is used to quickly show you a single case. You will need to enter the Thrive ID of the case you wish to view accurately and press enter.



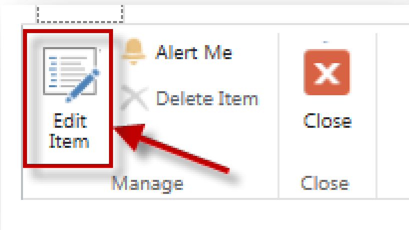
Entering a partial Thrive ID will result in no cases being displayed.
To return the list to show all, remove the Thrive ID from the filter and press enter

Cases

The cases section will display all cases that are open and have your name in the "Name of Worker" field
Clicking the double-ended arrow under the "select" heading will display documents related to that case (documents are not held within the case itself but in a document library)

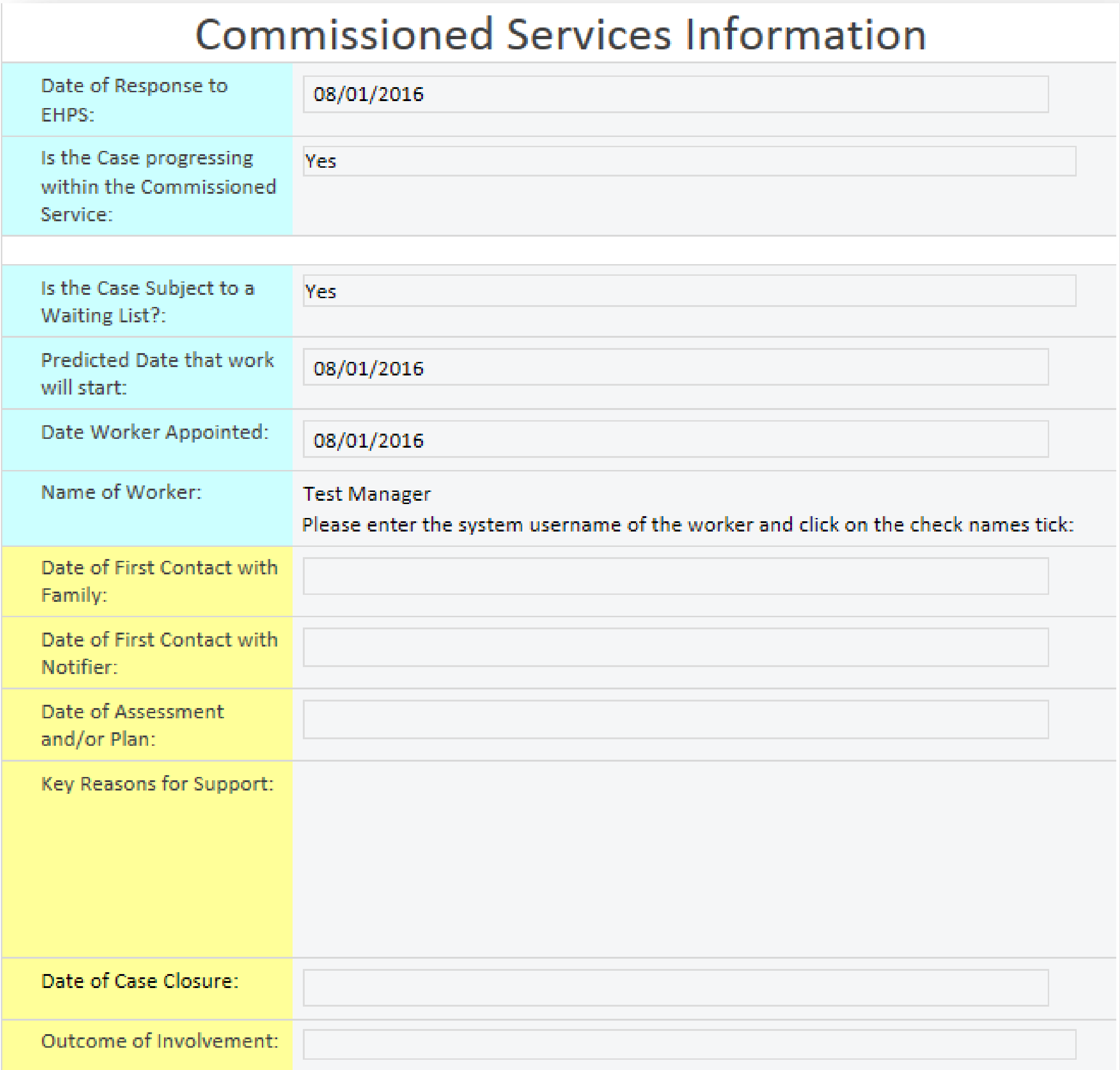


To enter a case, to edit or review information, click on the "Thrive ID". When opening a case it will always open in "Read" mode. To make changes to the case you will need to select "Edit" from the Menu



Selecting close will take you back to the “My Cases” page

Here is an example of a partially completed case. The commissioned service worker should ensure any missing information from the case record is added and kept up-to-date.

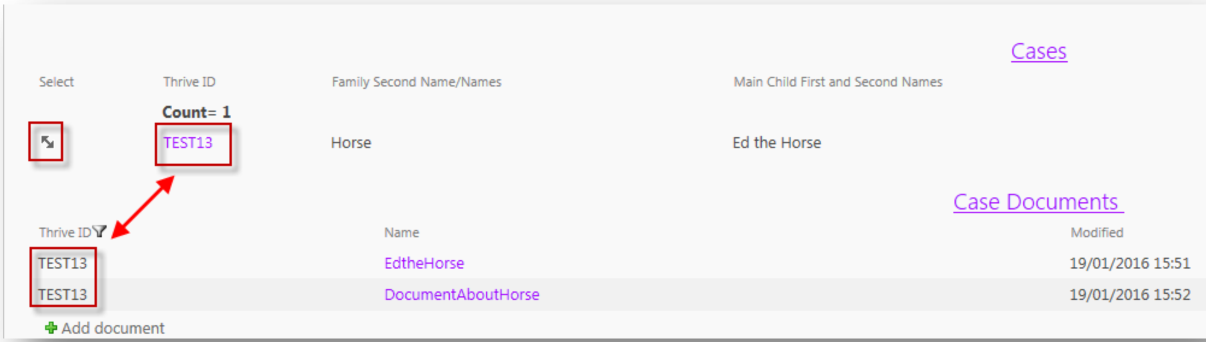


Commissioned Services Information

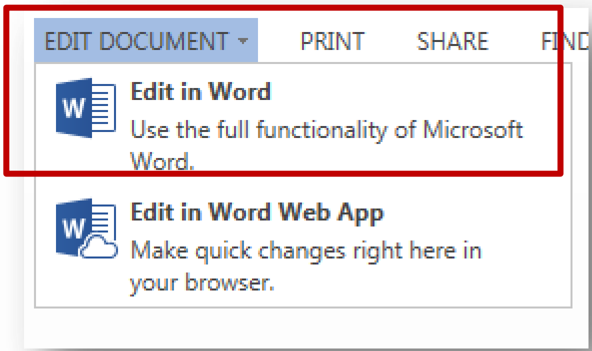
Date of Response to EHPS:	08/01/2016
Is the Case progressing within the Commissioned Service:	Yes
Is the Case Subject to a Waiting List?:	Yes
Predicted Date that work will start:	08/01/2016
Date Worker Appointed:	08/01/2016
Name of Worker:	Test Manager Please enter the system username of the worker and click on the check names tick:
Date of First Contact with Family:	
Date of First Contact with Notifier:	
Date of Assessment and/or Plan:	
Key Reasons for Support:	
Date of Case Closure:	
Outcome of Involvement:	

Case Documents

In Thrive documents are stored in a documents library. To review the documents related to a case select the relevant double-ended arrow.



To view a document, click on the document name in the "Name Column".   Documents will open in Read-only by default. To edit a document you will then need to select "Edit Document" from the menu bar as shown below.



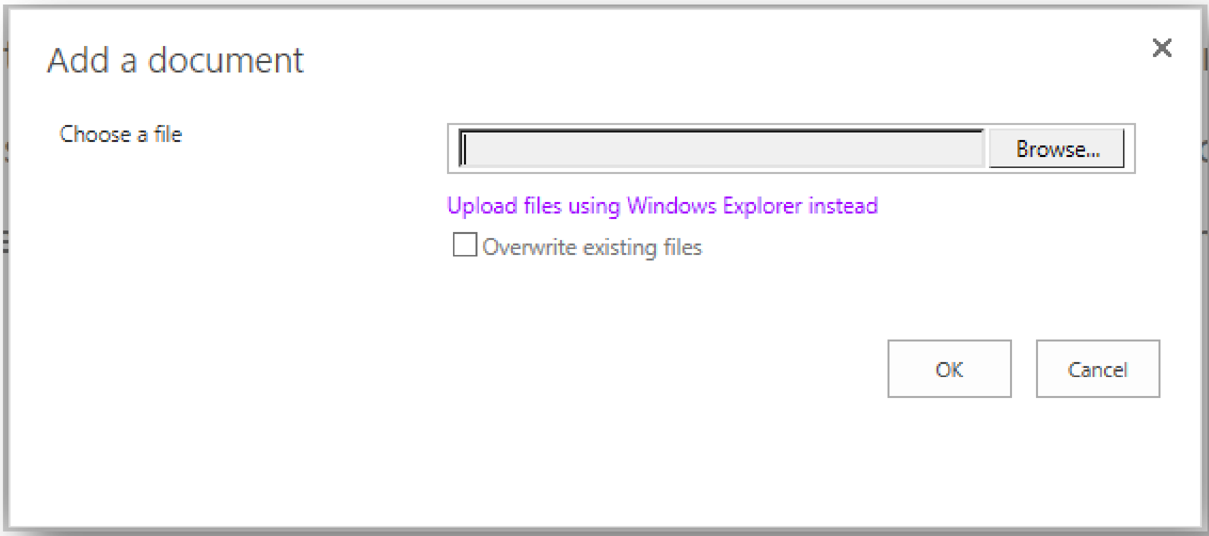
To edit the document select "Edit in Word" make your changes and then click on the "Save" icon displaying the two small green arrows (as shown below). This will then save directly back to Thrive.

IMPORTANT

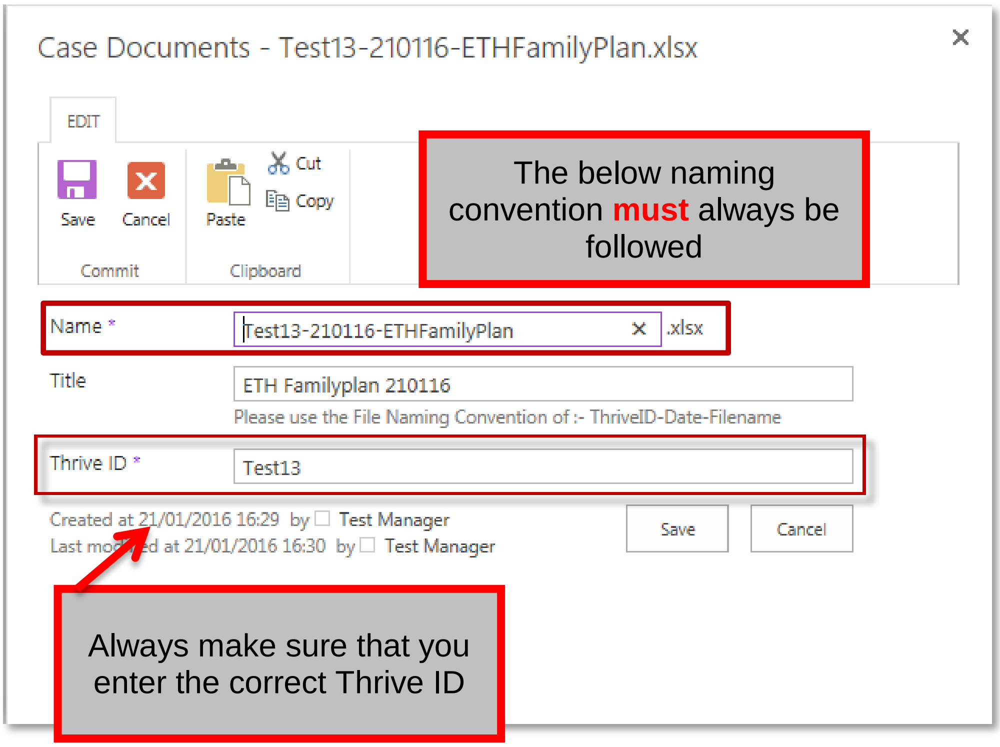
Before uploading any new documents to Thrive, please make sure that the filenames follow the recommended file naming convention:

ThriveID-Date-Filename e.g. Test13-210116-ETHFamilyPlan.xlsx

To upload a new document to a case select “Upload Document” purple button. The following screen will be shown.



Select “Browse” then navigate to the document on your computer, select the file and click open. Once the filename appears in the “Choose a file” box select ok

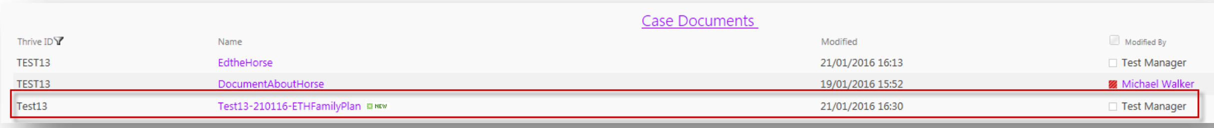


Then enter the title of the document and the Thrive ID and click “Save”.

IMPORTANT

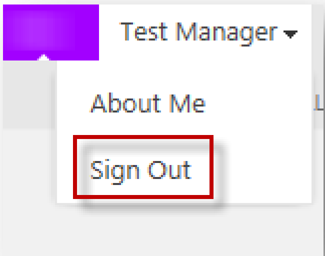
Please ensure that you enter the correct Thrive ID when uploading a document.

If an incorrect Thrive ID is applied to a document that document will be linked to an incorrect case and you will need to speak to your manager to rectify the issue.



Logging Out

To log out of Thrive, click on your name in the top right hand corner and select “sign out”



IMPORTANT
When you finish your session or are taking an extended break from using Thrive YOU MUST LOG OUT and close your browser.
Leaving Thrive open and idle for extended periods will result in time out errors and may cause you to lose work.

Problem Solving

If you have any problems when using Thrive in first instance please speak to your Manager who will support you in resolving the issue. If the problem is technical in nature the manager may log a call to EiS on your behalf.

If your problem relates to your password please use Self-service.

E. Guidance for Commissioned Service Managers

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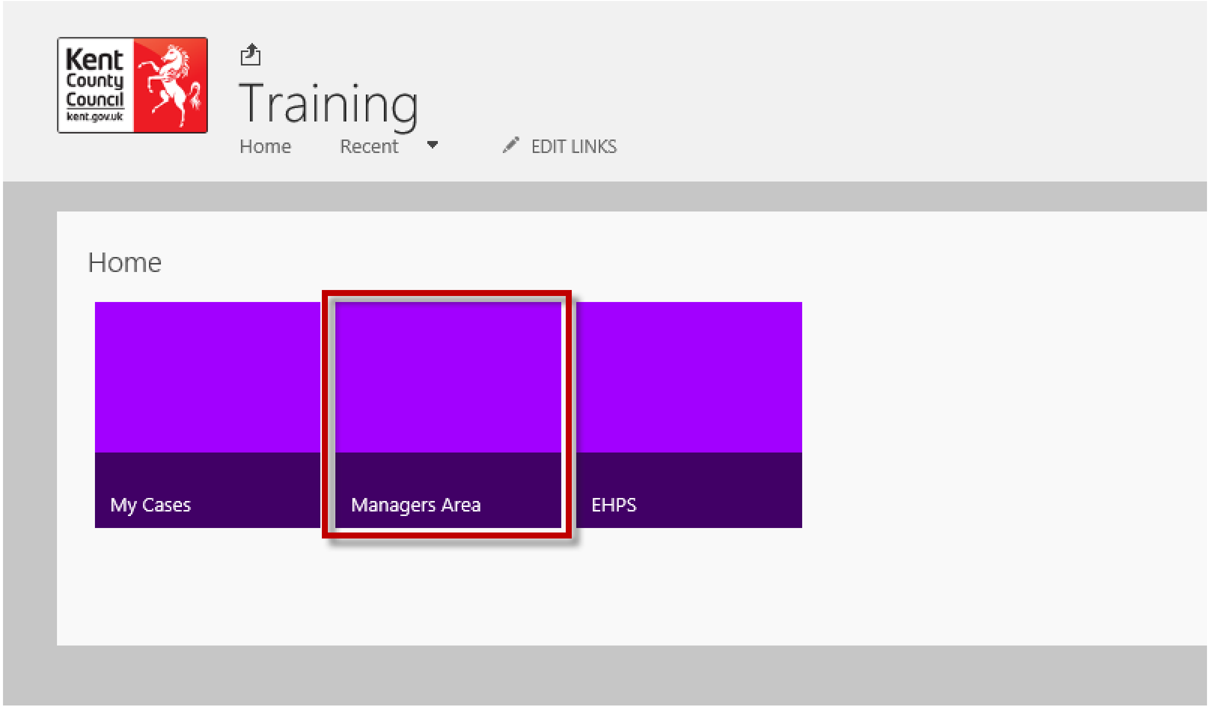
Webber, Claire - EY PS

Guidance for Commissioned Service Managers

Please ensure you read the Workers Guidance as this will provide you with a good understanding of the site structure and functionality and the actions that your workers will be performing.

Managers Area



The Managers area is divided into three sections

- Five buttons and two filters
- Case List (showing open cases)
- Case Document Library

5 Buttons and 2 Filters

The **'Home'** button will take you back to your commissioned service homepage

The '**Cases Requiring Action'** button will take you to a page with all the cases requiring your attention as a manager

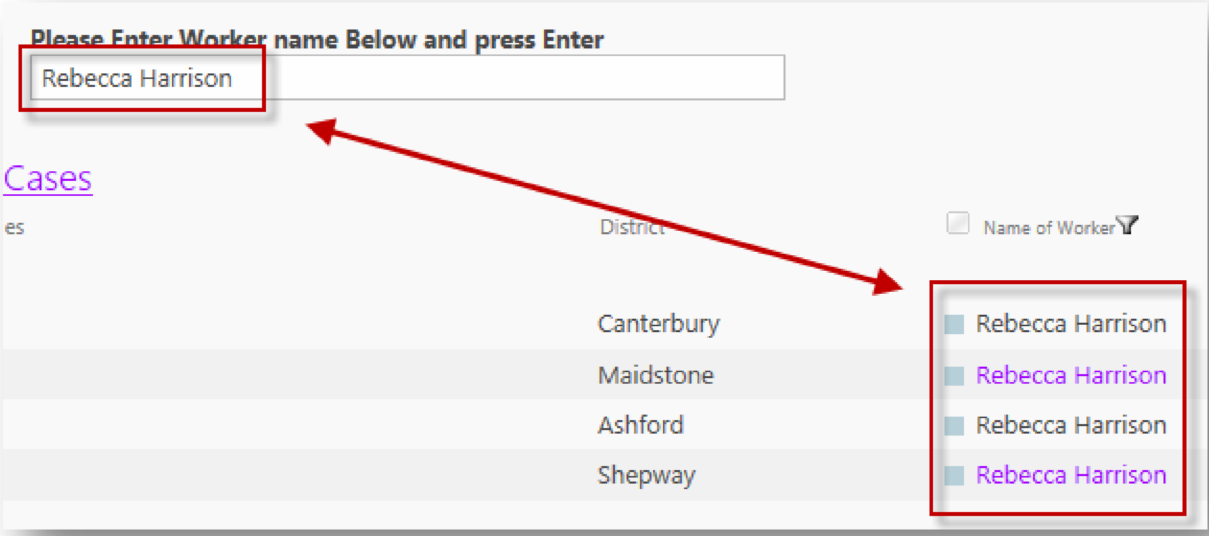
The **'Reports'** button offers views to assist you as managers

The **'Archive'** button will take you to the archived cases for your service

The **'Upload'** button is covered under the workers Case Documents Section

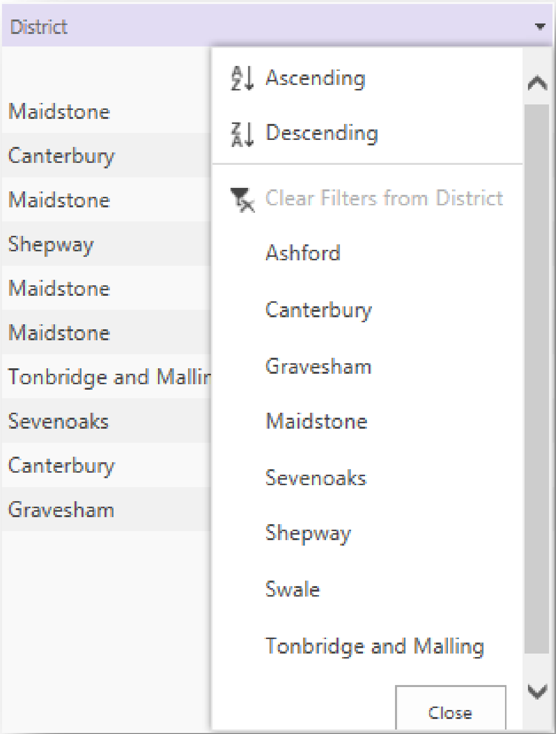
The Thrive ID filter is the same as the filter described in the workers section

The worker name filter allows you to filter the cases displayed to show only those of a specific worker. You will need to enter the workers name exactly as it appears in the "Name of Worker" field



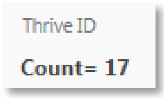
To return the list to show all, remove the name from the filter and press enter.

Note – You can also filter on each column by clicking the column name and selecting the required value in the drop down

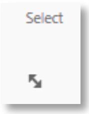


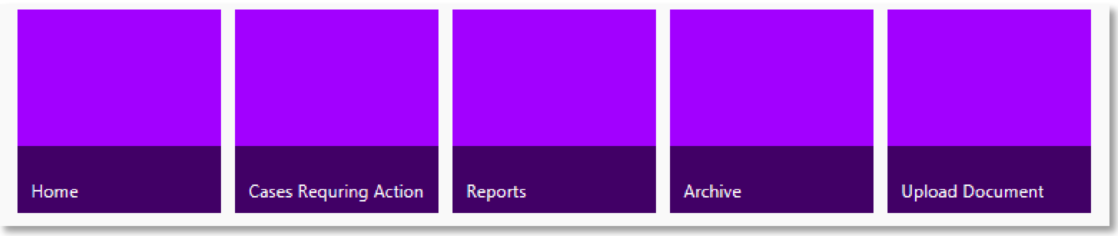
Case List - All Open Cases and Related Documents

This is a view displaying all “OPEN” cases within your service, displayed in order of creation. There is also a “Count” of how many open cases there are shown under the “Thrive ID” field.



Clicking on the arrow under the “select” heading will display the documents related to that case (documents are not held within the case).





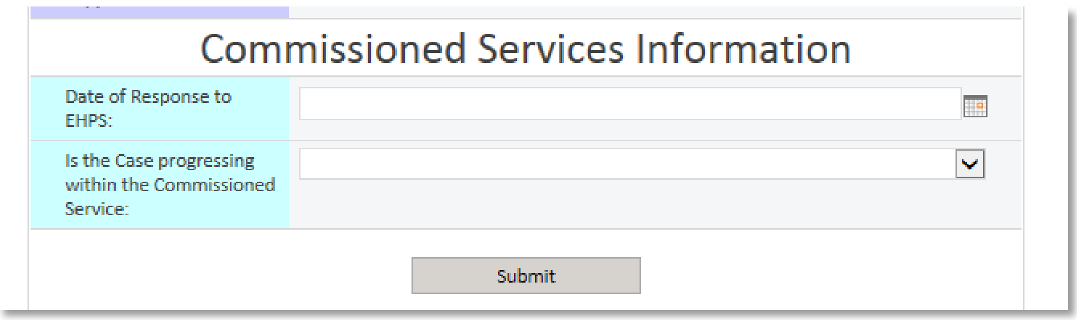
Cases Requiring Action Button

This button contains has three sections

1. Cases Awaiting Decision

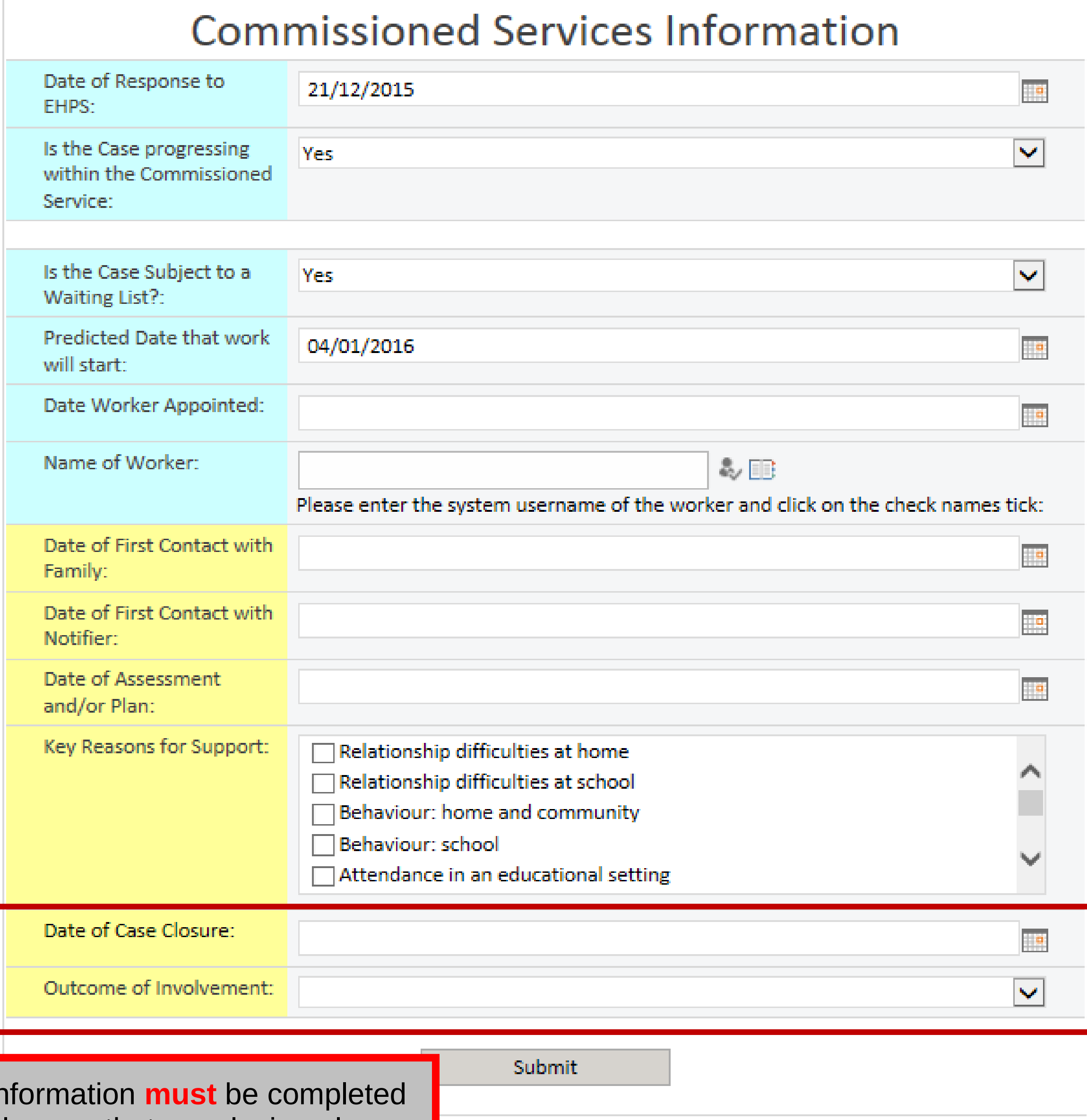
This displays cases that have been added to the system by the EHPS that are awaiting your decision on acceptance or not. When you have items within this list you will need to undertake the following actions:

- Open the case by clicking on the Thrive ID and select click “edit”
- You will see that the EHPS team has completed the demographics section. You now need to complete the “Commissioned Services Information” section, as appropriate
- If you select “No” you will be prompted to enter a reason. Please also contact EHPS to discuss this and not just rely on the system
- If you select “Yes” the form will expand to allow worker information to be added. Always use the worker’s **Thrive Username** and not their actual name e.g. bloggj01. Once added to the field it will appear in their “my cases” view
- The pending option is for use when you are discussing the case with EHPS team prior to accepting or declining the case
- When you have finished making changes click submit



2. Cases Accepted Awaiting Worker

This section displays cases that you have accepted but not yet assigned a worker to.



Commissioned Services Information

Date of Response to EHPS:	21/12/2015
Is the Case progressing within the Commissioned Service:	Yes
Is the Case Subject to a Waiting List?:	Yes
Predicted Date that work will start:	04/01/2016
Date Worker Appointed:	
Name of Worker:	Please enter the system username of the worker and click on the check names tick:
Date of First Contact with Family:	
Date of First Contact with Notifier:	
Date of Assessment and/or Plan:	
Key Reasons for Support:	Relationship difficulties at home Relationship difficulties at school Behaviour: home and community Behaviour: school Attendance in an educational setting
Date of Case Closure:	
Outcome of Involvement:	

Submit

This information **must** be completed for all cases that are closing along with a closure summary.

IMPORTANT

It is critical you use the Thrive Username of the worker you are assigning to the case to avoid any errors.

3. Cases Pending (discussions in Progress with EHPS)

This displays any open cases that have the “Pending” status and are therefore awaiting further action and a final decision.

Reports Button

This area displays a number of different views to assist you in managing your service case load.
The latest Documents Uploaded View is of particular importance. If any worker uploads a document with the incorrect Thrive ID, this view will display all the MOST RECENTLY uploaded documents. You can select and edit the document details to change it to the correct Thrive ID.

Archive Button

This area is divided into three sections just like the main managers area. However instead of showing open cases, this displays all cases that have been marked as "Archived" following closure or declining the case.
Archived Cases will not display in workers My Cases area or the Managers Area.

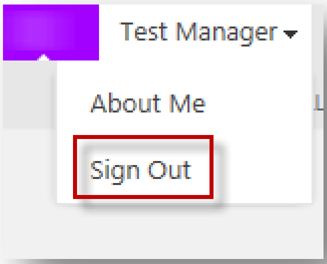
** IMPORTANT MESSAGE**
It is important to make sure you are marking your cases as Archived when they are declined or when a worker has finished working with the family. Archiving cases will make your lists more manageable because you will only see cases that are open or require management action.

Upload document button

Please see the Workers Guidance above for guidance on uploading documents.

Logging Out

To log out of Thrive please click on your name in the top right hand corner and select “sign out”



IMPORTANT
When you finish your session or are taking an extended break from using Thrive YOU MUST LOG OUT and close your browser.
Leaving Thrive open and idle for extended periods will result in time out errors and may cause you to lose work.

Problem Solving

Please use this guidance to support your workers with any problems in using Thrive. If a worker has forgotten their password and not setup self-service, EiS will request written authorisation from a manager for a password reset.

If the problem is technical in nature you may log a call to EiS on the behalf of your worker.

Email - Support@eis.kent.gov.uk

Telephone - 0300 065 8888

F. Commissioned Service Managers Guide to Thrive Lists and Reports

[Type the document subtitle]

Webber, Claire - EY PS

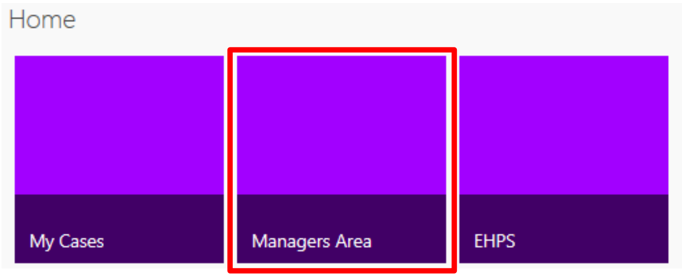
Managers Guide to Thrive Lists and Reports

For Manager's there are various case lists and reports that will help managers to see the progression of cases and to identify when management action is required. The lists outlined in section one are your daily tools but there are some reports that have particular functions to support managers too. This guidance will take you through each of these lists and reports to provide clarity of use and purpose.

1. Daily Lists

1.1 Managers Area:

Access the "Managers Area" for your service



1.1.1 Case List

What this list shows:
This list shows all the cases within your service that have not yet been archived. This includes yet to be accepted, open to a worker, closed to a worker but not archived.

1.1.2 Case Documents

What this list shows:
This list shows what documents are attached to each case. To view documents linked to a specific case, click on the double ended arrow to the left of the Thrive ID in the case list.
When to use it:
This can be used to check that all the relevant documents are attached to the record.
How it helps:
This will allow you as a manager to check the contents of documents, to ensure your workers have all the relevant information that they need to work with the family.

1.2 Cases Requiring Action:

Within the manager’s area, click the following button:

Please note: Case’s requiring action page is only a viewing page you should make a note of the case ID and return to the manager’s home page. You can then search the case ID, click on the double ended arrow to view all document linked to the case. Documents containing sensitive personal information should **not** be sent via email they should be shared safely as appropriate via Thrive.

1.2.1 Cases Awaiting Decision

What this list shows:
This list allows you to see all new referral your service has received, in order of oldest referral to newest.
When to use it:
This report has been designed to be check daily, to identify new cases allocated from EHPS district teams.
How it helps:
This list will help ensure that no cases are missed, and to ensure that all cases are processed in a timely manner.

1.2.2 Cases Accepted Awaiting Worker

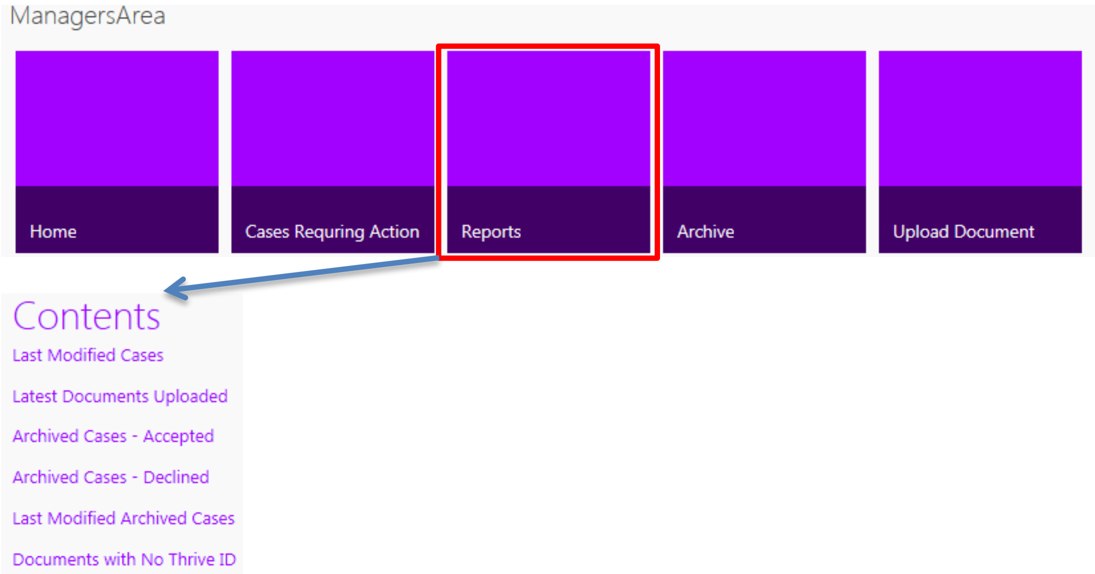
What this list shows:
This list shows you the cases that you have accepted and that are still waiting for allocation of a worker.
When to use it:
This report has been designed to be check daily, to identify cases awaiting appointment of a worker.
How it helps:
This list helps ensure that no cases are missed and also ensures that other cases are not allocated before those on this list.

1.2.3 Cases Pending (Discussions in Progress with EHPS)

What this list shows:
This list shows any cases that are awaiting further information to enable a decision.
When to use it:
This should be accessed regularly when monitoring pending cases and on conclusion of discussions with EHPS district teams when an outcome to the case is known and the case can be progressed.
How it helps:
This list will help ensure that no cases are missed and will encourage conversation between commissioned service and EHPS team to reach a decision regarding allocation of these cases.

2. Reports

Go to "Reports" to see all additional reports



2.1 Last Modified Cases

What the report shows:
This report shows cases that have been recently modified and who modified them. This includes yet to be accepted, open to a worker, closed to a worker but not archived.
When to use it:
This report should be checked regularly to gain an overview of case activity in the service.
How this helps:
This report gives you a quick way of seeing case activity; it will always have the most recently modified cases at the top of the list.


Last Modified Cases

Thrive ID	Family Second Name/Names	Main Child First and Second Names	District
Count= 23			
TEST30	Flowerpot	Sarah	Maidstone
TEST15	Shumway/Barbie	Julia Shumway	Gravesham
TEST29	MArshall	Claire	Dartford

2.3 Latest Documents Uploaded

What the report shows:
The Latest Documents Uploaded view is of particular importance. This view will display all the MOST RECENTLY uploaded documents.
When to use it:
This report should be checked on a regular basis so you can see when new documents have been added to a case.
How this helps:
If a document is uploaded with an incorrect Thrive ID by a worker, you will be able to see this here. This will also help when awaiting further information regarding a pending referral.

Latest Documents Uploaded

Thrive ID	Name	Title	Created
TEST1	Noise	Noise	25/02/2016 13:36
TEST13	test2	test2	08/02/2016 09:51
Test26	connect2staff holiday form		29/01/2016 12:38
TEST25	TEST25-270115-WordDocument	WordDocument	27/01/2016 13:32

2.4 Archived Cases – Accepted

What the report shows:
This report will show you all cases that have been worked then closed by your service.
When to use it:
This report should be checked on a regular basis.
How this helps:
As a manager this report will help to review closed cases and outcomes.

Archived Cases - Accepted

Thrive ID	Archive Date	Family Second Name/Names	Main Child First and Second Names
Count= 1			
TEST19	14/01/2016	Flowerpot-men	Bill Flowerpot-man

2.5 Archived Cases – Declined

What the report shows:
This report will show you the cases that have been declined by your service and archived by EHPS district team.

Archived Cases - Declined

Thrive ID	Archive Date	Family Second Name/Names	Main Child First and Second Names
Count= 5			
TEST2	14/01/2016	Marshall	Claire
TEST4	14/01/2016	Broster	Jake
TEST8	14/01/2016	Man/Men	Banana

2.6 Last Modified Archived Cases

What the report shows:
This report will show you cases closed and archived by your service.
How this helps:
This will allow you to see the total number of cases that have been closed also the dates they were closed and modified.

Last Modified Archived Cases

Thrive ID	Archive Date	Family Second Name/Names	Main Child First and Second Names	District
Count= 6				
TEST19	14/01/2016	Flowerpot-men	Bill Flowerpot-man	Sevenoaks
TEST14	14/01/2016	Puddycat/Harrison/Bear-Le Cat	Suki Puddycat	Swale
TEST11	14/01/2016	Griffin	Peter Griffin	Maidstone

2.7 Documents with No Thrive ID

What the report shows:
This report shows you documents that have been incorrectly uploaded without a Thrive ID. For guidance on how to amend the Thrive ID please see document called Thrive document ID guidance for Managers. It is vital that a Thrive ID is entered in the document details box when uploading a document to ensure it is attached to the correct case and to prevent duplication of documents.
When to use it:
We recommended this report is checked on a weekly basis to ensure swift identification of any incorrectly uploaded documents, see guidance for more information.
How this helps: If a worker reports a document they have uploaded is missing you can check this report to see if it has been uploaded incorrectly.

Documents with No Thrive ID

Case Documents

Thrive ID	Name	Title
	TEST19-020316-BFprogresslog NEW	
	TEST2-020216-CMprogresslog NEW	

3. Archive

Go to "Archive" for archived cases

All Archived Cases

Select	Thrive ID	Archive Date	Family Second Name/Names	Main Child First and Second Names
	Count= 6			
	TEST2	14/01/2016	Marshall	Claire
	TEST4	14/01/2016	Broster	Jake
	TEST8	14/01/2016	Man/Men	Banana

The archive area for Managers shows you all cases that have been archived. This will help you to check to ensure a closure summary has been attached to each closed case. If a closure summary is missing the report will identify the worker to contact for the missing information.

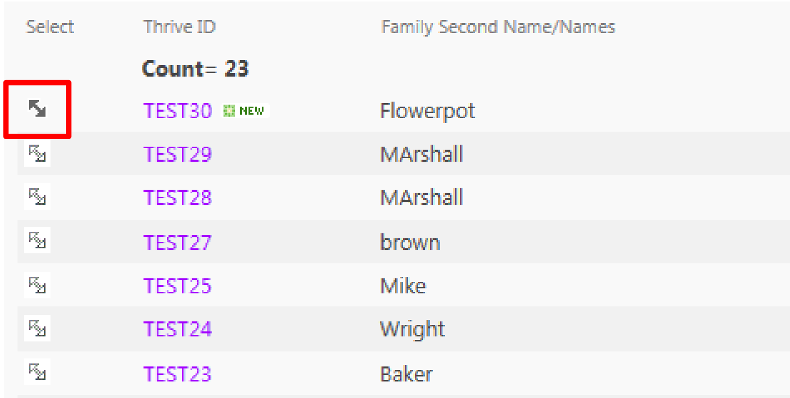
G. Thrive document ID guidance for Commissioned Service Managers

[Type the document subtitle]

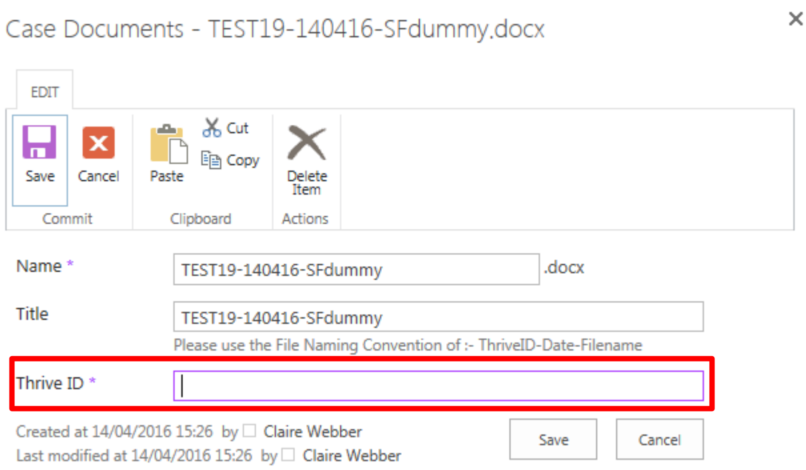
Webber, Claire - EY PS

Thrive document ID guidance for Commissioned Service Managers

Documents on Thrive are stored in a documents library. To review the documents related to a case select the relevant double-ended arrow to the left of the case list.



It is vital that an accurate Thrive ID is entered into the document details box when uploading a document to ensure it is then attached to the correct case. The case ID will always determine the record the document is attached to. If an incorrect ID is entered the document will be linked to the wrong case.

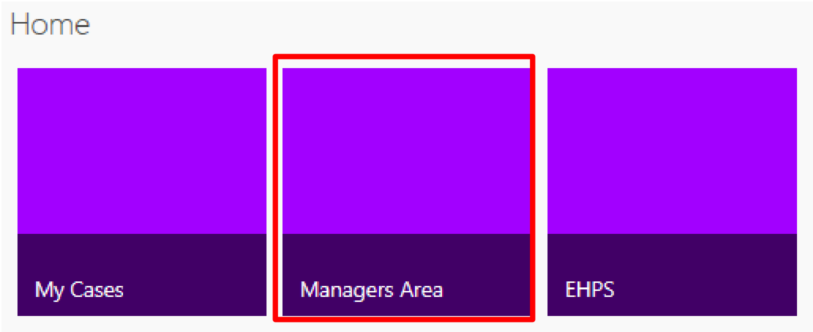


If a worker uploads a document without ID or with an incorrect ID they will not see the document on the record and therefore might assume that the document has not uploaded. In this instance they may attempt to upload the document again and so creating duplication on the system.

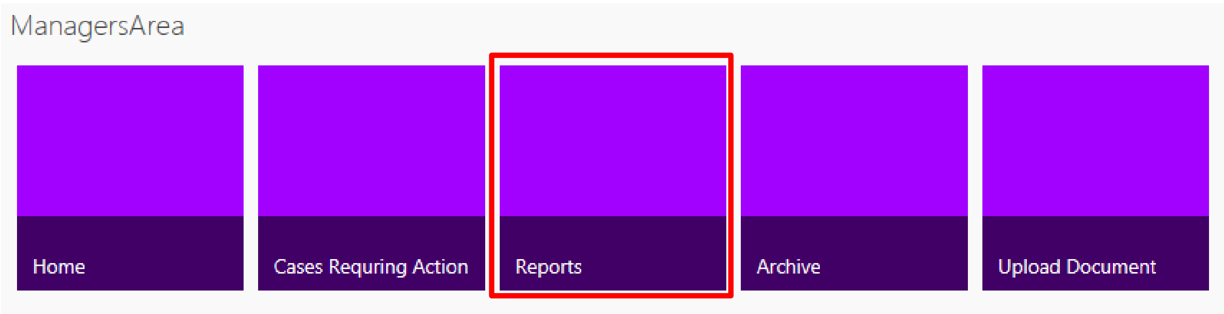
Managers should regularly check to make sure that all documents for their service have been uploaded correctly using the Documents with no Thrive ID report.

1. How to check for documents with no ID

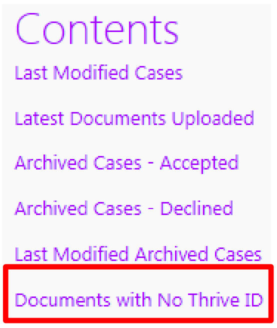
1.1 Access the “Managers Area” for your service



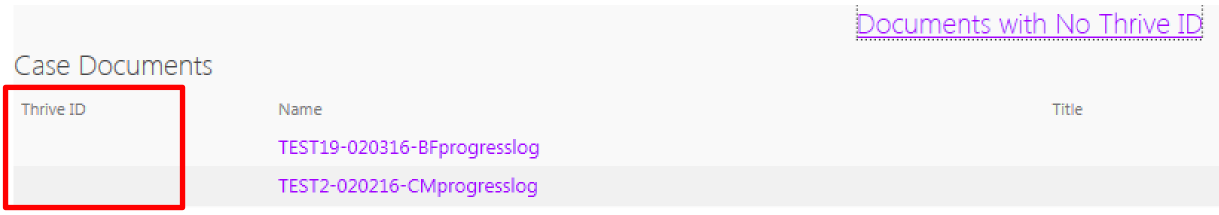
1.2 Go to “Reports” to see all available reports



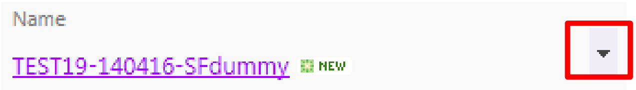
1.3 Select “Documents with No Thrive ID” report



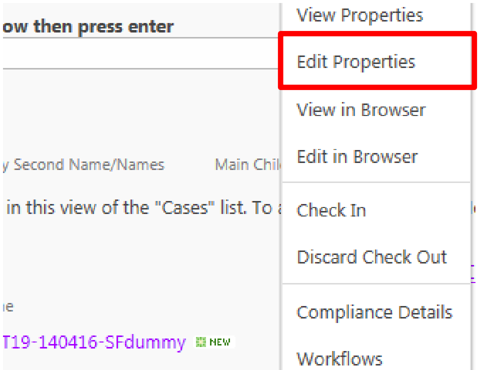
The screen shot below shows documents that have no Thrive ID and are therefore not assigned to the relevant record.



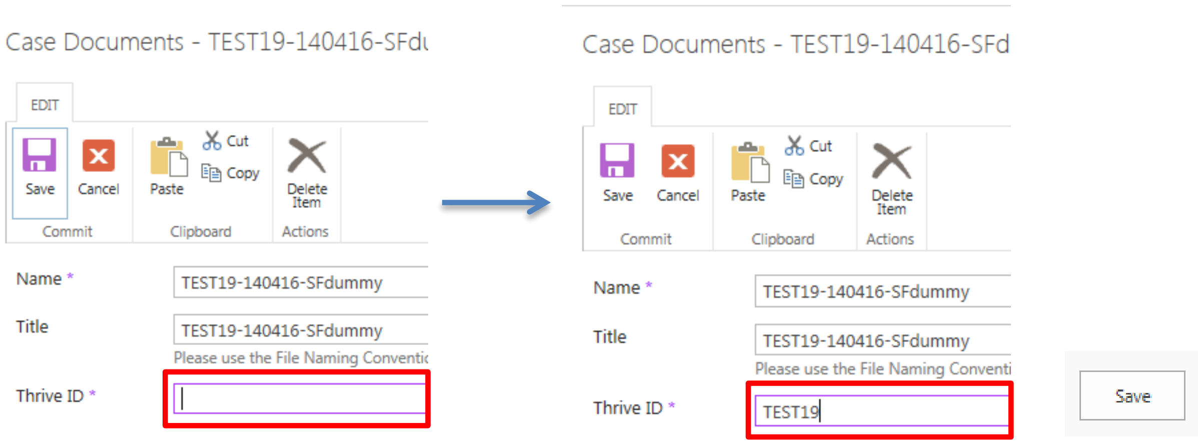
1.4 To correct this error you will need to edit the document properties by clicking on the arrow next to the document, as shown below.



1.5 Select "Edit Properties"



1.6 Ensure that the Thrive ID field is entered correctly then press save



The document will now disappear from the report and be available on the correct record. It is recommended that the worker now ensures there are not duplicate documents on the record and takes steps to delete one if this is the case.

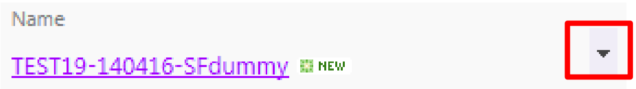
2. Identifying documents with an incorrect Thrive ID:

If you notice a case with an incorrect document linked, this must be corrected immediately.

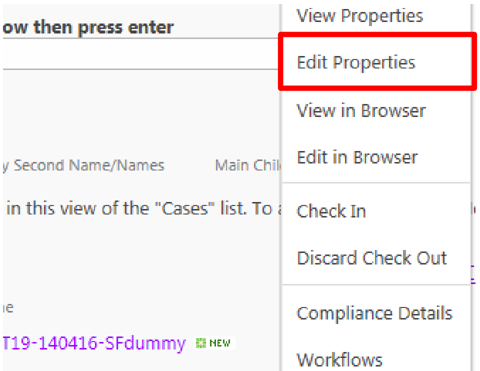
If the document was uploaded by the EHPS district team an email will need to be sent to them so they are able to attach the documents to the correct case.

If the document was added by a commissioned service worker, the worker will need to be informed.

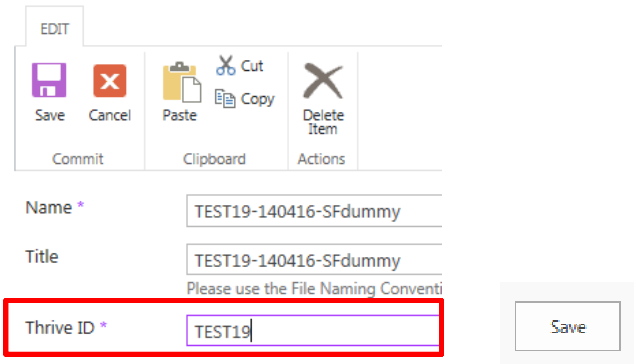
2.1 To correct this error edit the document properties by clicking on the arrow next to the document, as shown below.



2.2 Select “Edit Properties”



2.3 Delete the ID currently showing and enter the correct ID then press save



KENT COUNTY COUNCIL

H. Thrive Guidance for IT Teams

[Type the document subtitle]

Webber, Claire - EY PS

Thrive Guidance for IT Teams

Thrive is a SharePoint based cloud system used by Kent Early Help and Preventative Services to securely store and share information including sending requests for support to Early Help Commissioned Services. Setting up the browser will be very important to give the users a pleasant and productive experience.

Browsers

EiS minimum requirement for Thrive would be Internet Explorer 10. However, Microsoft is no longer supporting Internet Explorer 10 we therefore strongly recommend users upgrade to Internet Explorer 11.

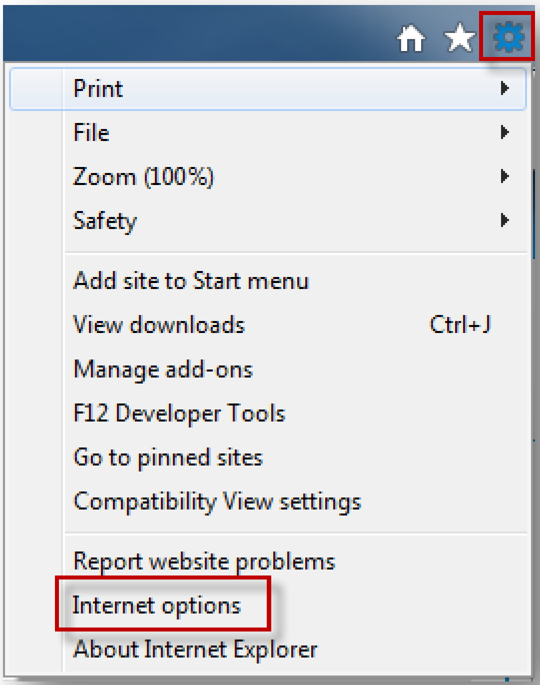
The recommended Browser for Thrive is **Internet Explorer 11**.

Other Browsers – Chrome, Firefox, Edge and Safari will all be able to access Thrive but not all features will be supported (such as opening documents).

Trusted Sites

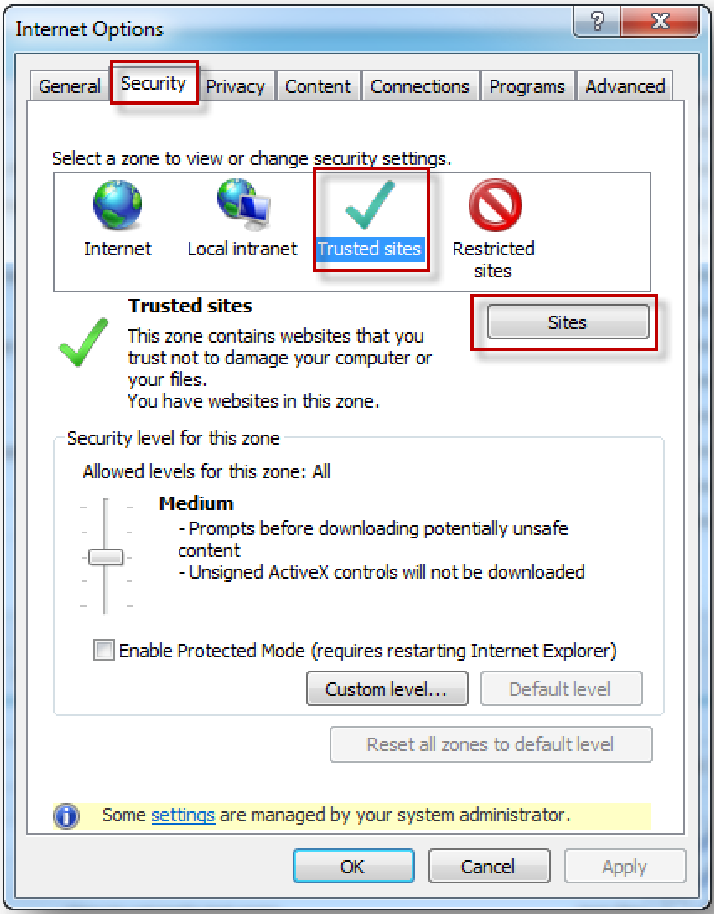
You will need to add the following sites to Internet Explorer's trusted sites section

1) Go to the cog in the top right hand corner of Internet Explorer and select Internet Options



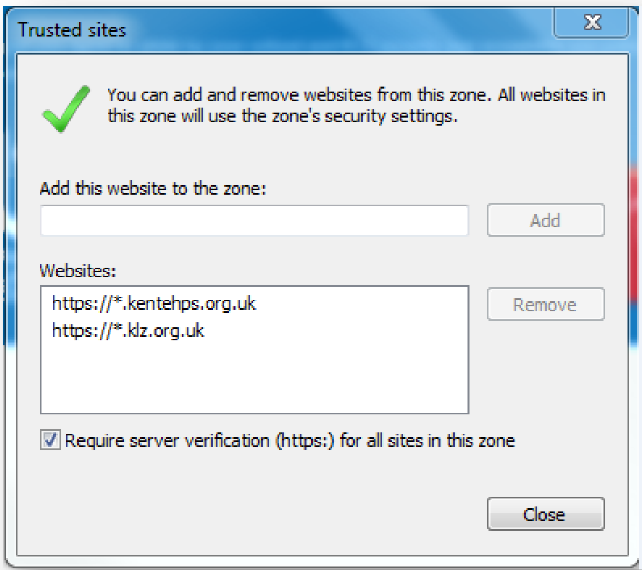
2) In the window that opens select "Security"

3) Click the Trusted sites "Tick" and then click "Sites"



4) Add Https://*.klz.org.uk into the “Add this website to the Zone” box then click “Add”

5) Add https://*.kentehps.org.uk into the “Add this website to the zone” box and click “Add”



I. Thrive Frequently Asked Questions for Commissioned Service Staff

Webber, Claire - EY PS

Thrive Frequently Asked Questions for Commissioned Service Staff

Contents

1. Accessing Thrive

1.1 Q. What should I do if I cannot access my Thrive account?

A. If you are unable to access your Thrive account, please consult your user guidance in the first instance. This will advise you to use your self-service facility and contains other trouble shooting advice. If you continue to have any problems contact your Line Manager for advice.

1.2 Q. When trying to log onto Thrive, it is asking for my domain name, what should I do?

A. When accessing Thrive, your username should be preceded by 'KLZ\' for example; KLZ\smithj01 Ensure there are no spaces in your user name.

1.3 Q. When I try to click on the EHPS Administration box from the homepage I get the error message - "sorry this page hasn't been shared with you", what should I do?

A. The EHPS Administration button on the homepage is only accessible to EHPS Business Support staff and EHPS Workers. Click the *Thrive* box to access areas of the system appropriate to you if this is the case.

2. Self-Service and Password issues

2.1 Q. I have just received my Thrive user ID and temporary password what should I do?

A. Before logging into Thrive please:

- Review the guidance document and acceptable use policy to ensure you have full understanding of the system.
- Set up your self-service
- Change your temporary password to something only you know.

2.2 Q. I have used Self Service to update my security questions and I have changed my password. Now when I try to access I can only see a blank page, what should I do?

A. Restart your computer and then try again. You should now be able to access Thrive.

2.3 Q. Why can't I access self-service?

A. When trying to access self-service to reset your password or set your security questions, do **not add KLZ** before your username.

2.4 Q. I have changed my password on self-service and logged out. I am now getting a message that says "Incorrect user ID or password" what should I do?

A. When you are finished on self-service please close the web page, then open a new page and go to the following link: www.KentEHPS.org.uk to log into Thrive

2.5 Q. What format should my password be when I reset it?

A. Passwords are crucial to the security of the information and are a first line barrier against unauthorised access, so the longer and more complex they are and the more frequently changed, the better. Given the sensitivity and confidentiality of the information that is to be placed on Thrive, strong/complex passwords are used.

- A password should be a minimum of 6 Characters in Length
- A Password MUST contain at least 3 out of the 4 different Character Type requirements
    - An Upper case letter
    - A lower case letter
    - A number
    - A special character such as ~ ! @ # $ % ^ & * _ - + = ` | \ ( ) [ ] { } : ; " ' < > , . ?/
- Passwords cannot contain the username or parts of the username that exceed two consecutive characters e.g. if your account name or full name is 'jamas' then your password can contain 'ja' but not 'jam'
- Each time a user updates their password it should be unique to ensure your account is kept secure e.g. no sequential passwords after a change so you cannot use 'Password01' then 'Password02'
- Passwords should be changed every 30 days to ensure they remain secure

2.6 Q. My password has expired, am I able to log in to Self-Service

A. Yes, you can also still change your password by selecting *forgotten password*, this will allow you to change your password, click here for more guidance on using self-service

2.7 Q. My password has expired, and I have not set up my Self-Service

A. Your manager will need to complete the following form for a password reset Thrive User Registration and User Changes Form.

Upon submission of the form you will be presented with a reference number, please keep a note of this, you will be asked for it if you contact us regarding your request. Your request will be processed within 5 working days of submission. Following resolution of this request you will be required to set up your self-service to avoid future issues.

3. Case issues

3.1 Q. I am a Key Worker and I am unable to see any cases, what should I do?

A. Your Manager adds the workers name to the records, this then gives access to the worker, in the first instance the worker should speak to their manager.

When adding a workers name to a case their Thrive user ID must be entered, not their full name, then click on the address book icon. This will ensure access is being sent to the correct worker and not another worker that happens to have the same name. If they are sure the correct user name is being used and they are still unable to view the case the manager should contact EIS.

3.2 Q. I am trying to change the Key Worker but the previous worker name keeps appearing what should they do?

A. To make sure Thrive recognises the change, please remove the original name by highlighting the whole name, then press delete, click the “Tick” to the right of the box (this makes Thrive check the box and see it is blank) then enter the username of the new user and click the “Tick” again.

3.3 Q. I am trying to allocate cases however on the “case requiring action” page I am unable to see any documents linked to the case, what should I do?

A. Case’s requiring action page is only a viewing page you should make a note of the case ID and return to the manager’s home page. You can then search the case ID, click on the double ended arrow to view all document linked to the case. Documents containing sensitive personal information should **not** be sent via email they should be shared safely as appropriate via Thrive.

4. Documents

4.1 Q. How do I view the documents related to my case?

A. When viewing documents linked to a case click on the double ended arrow next to the Thrive ID to ensure you are viewing the documents linked to the right case.

4.2 Q. When trying to edit a word document in Word Web App I receive a file conversion message, what should I do?

A. When editing documents open the document in Microsoft Word, not in Word Web App. This will stop any error messages and prevent duplication of documents.

4.3 Q. I have added a document to Thrive and it is not appearing on the relevant case and when I try to upload it again I get a message saying a document with this name is already on the system, what should I do?

A. Go to your manager and ask them to check the *Documents with no Thrive ID* report from here they can edit the properties to make sure that all fields are completed correctly this report is explained within Managers guide to lists and reports. In future please ensure that you correctly complete all fields when uploading and naming documents.

4.4 Q. I have added a document on to Thrive with the correct Thrive ID but it is not appearing on the relevant case?

A. If you have added a space in the Thrive ID e.g. TEST 13 this will not attach the document to the case. You will need to contact your manager and ask them to amend the Thrive ID accordingly.

5. Thrive User Registration and User Changes Form

5.1 Q. A new worker has started and needs a Thrive account/A Worker is leaving and their Thrive account needs to be closed.

A. All user access and change requests for Thrive must be made by the users' line manager using the following form; Thrive User Registration and User Changes Form.

When you have a new member of staff requiring access to Thrive first select the *Access to Thrive* option then complete the form and click submit.

If you need to make a change to a Thrive account first select *A Change to a Thrive User Account* option then complete the form and click submit.
The changes form is used to;

- Delete user account (you must inform us when your staff member leaves or no longer requires access to Thrive)
- Change user name, organisation or job role
- User account suspension
- User account reset or password change (if the user is experiencing difficulty with self-service)

Upon submission of the form you will be presented with a reference number, please keep a note of this, you will be asked for it if you contact us regarding your request. Your request will be processed within 5 working days of submission.

This form is also available on Kelsi: http://www.kelsi.org.uk/special-education-needs/early-help-and-preventative-services/Early-Help-Toolkit