

Guide to Enable Audit Action Plans

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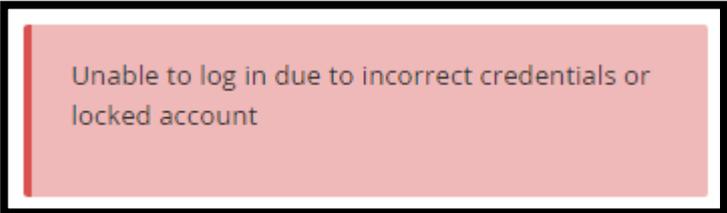
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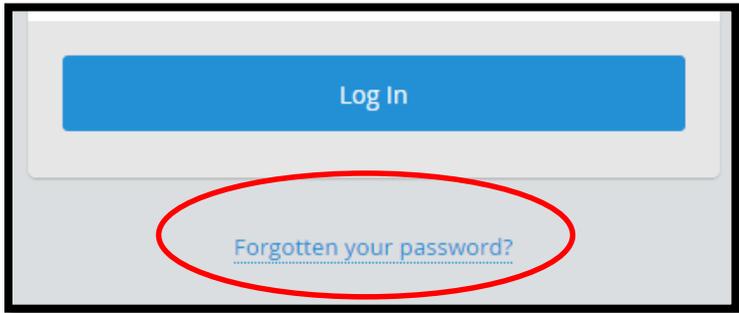
LOGGING IN TO YOUR AUDIT ACCOUNT

To view and update your audit action plan you will firstly need to log back into your audit account. To do so, please click on this link <https://essex.vc-enable.co.uk/> and enter your email address and password. You may be asked to change your password for data protection purposes.

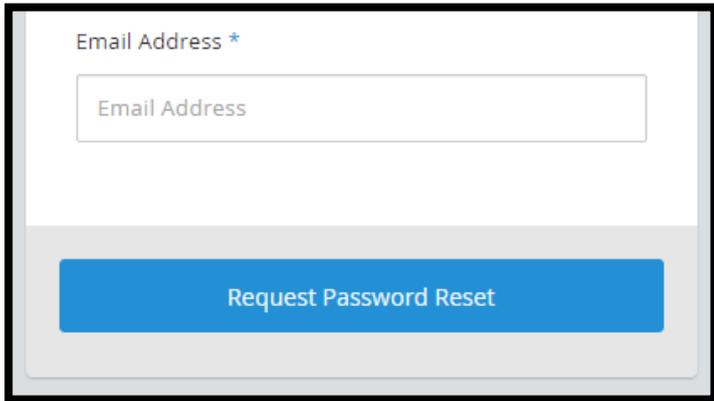
If you have forgotten your password or if you see the following message you will need to request a password reset.



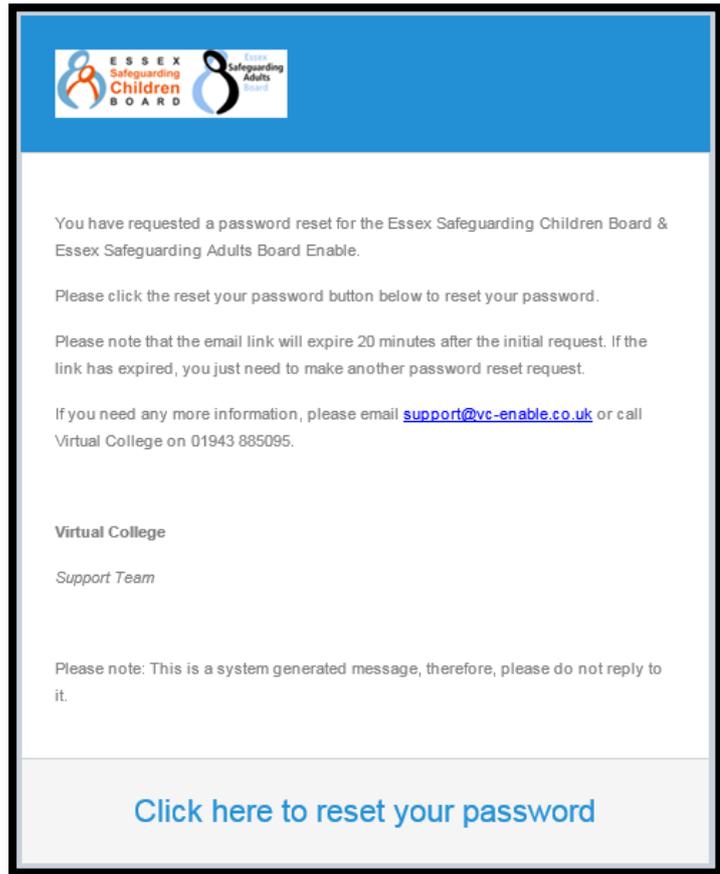
To request a password reset, you will firstly need to click on the "Forgotten your password?" link underneath the "Log In" button.



You will then need to type in your email address on the following screen and click "Request Password Reset". The system will send you an email with a link you will need to click on to input a new password.



If your email address is not in the system or you incorrectly type it then you will not receive a password reset email. The email looks like the following. The link expires after 20 minutes due to data protection. Please ensure that you change your password within 20 minutes of requesting the email.

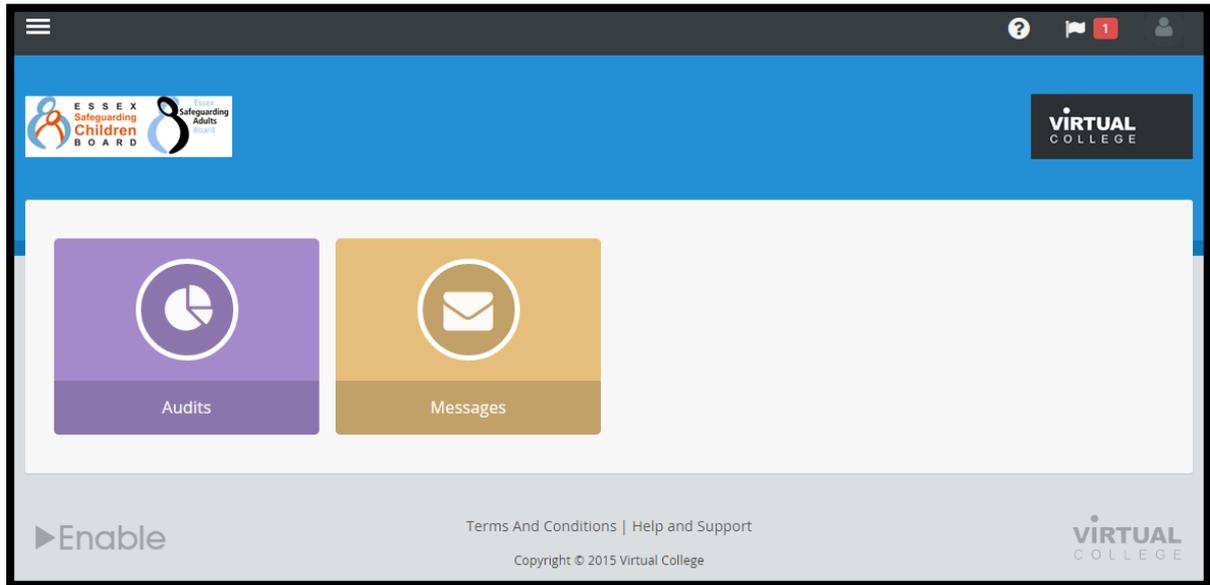


WHAT SHOULD YOU DO IF YOU DON'T RECEIVE THE EMAIL?

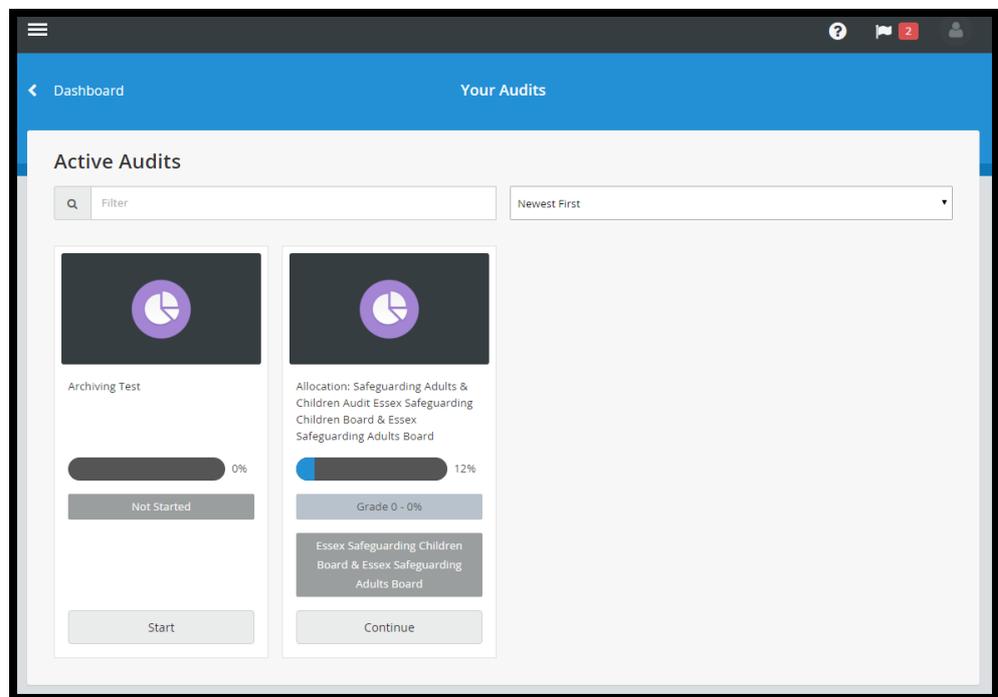
Please note that the email can be filtered into your junk/spam folder so please also check here if it does not appear in your main inbox. If it is not in your inbox or junk box, please try requesting another password reset email. If after the second time you still do not receive an email, please email our support team at support@vc-enable.co.uk or call 01943 885095.

ACCESSING YOUR AUDIT

When you log in, you will see the screen below. Click on the purple audit button to be taken into your audit. If you are only allocated to one audit, you will be taken straight into it.



If you have been allocated to more than one audit, you will be asked to choose which audit you would like to view.

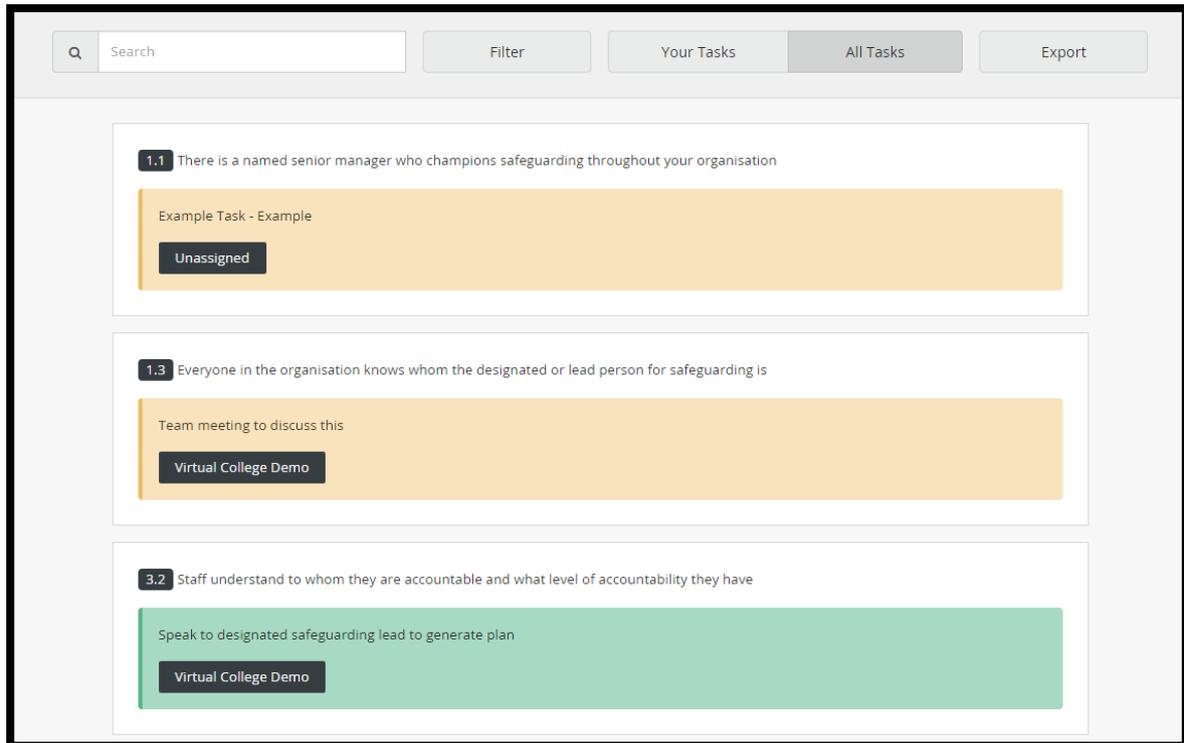


VIEWING YOUR ACTION PLAN

When you are viewing you audit, you can quickly view your audit action plan by clicking the blue "Action Plan" button at the top of the page.



This will take you into your action plan. From here you can view all of your action plan tasks for each question. Clicking on the action plan task will open up the question so that you can edit and add more information to it.



EXPLAINING THE COLOURS OF YOUR ACTION PLAN

When you are viewing your action plan, you may notice that some of the action plan tasks are different colours. The colours mean the following:

Yellow: The action plan task is in progress. If it has a deadline date, the date has not yet passed.

A screenshot of a task card with a yellow background. At the top, it reads "1.3 Everyone in the organisation knows whom the designated or lead person for safeguarding is". Below this, the task description is "Team meeting to discuss this". At the bottom, there is a button labeled "Virtual College Demo".

Green: The action plan task has been marked as complete.

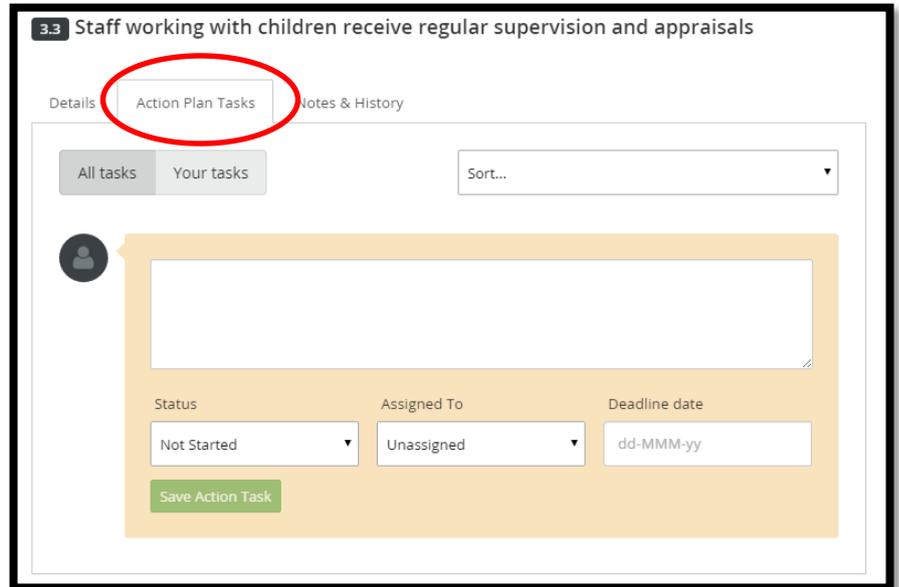
A screenshot of a task card with a green background. At the top, it reads "3.2 Staff understand to whom they are accountable and what level of accountability they have". Below this, the task description is "Speak to designated safeguarding lead to generate plan". At the bottom, there is a button labeled "Virtual College Demo".

Red: The action plan task is still in progress and has passed the deadline date.

A screenshot of a task card with a red background. At the top, it reads "7.1 Children are made aware of their right to be safe from abuse. This is achieved through information made available, for children, young people and parents about where to go for help in relation to maltreatment and abuse". Below this, the task description is "Send information pack to parents". At the bottom, there are two buttons: "15 days ago" and "Virtual College Demo".

ADDING A NEW ACTION PLAN TASK

To add a new action plan task for a question, we need to open up the question and navigate to the action plan tasks section. For example, we would like to add an action task to question 3.3. We navigate to question 3.3 and then click on the “Action Plan Tasks” at the top of the question box.



From here we can add a new action plan task. To do so, we write our task in the text box provided. We can then set the status of the action plan, assign it to a user and set a deadline date.

This box is where you enter or update text

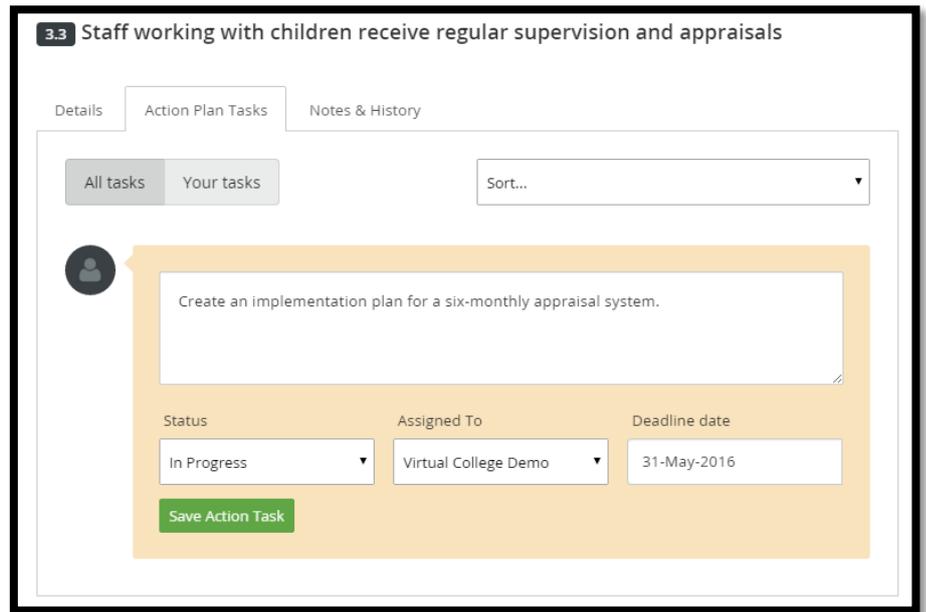
This drop-down box allows you to assign the task a deadline date or change the deadline date.

This drop-down box allows you to change the status of the question. You can choose from:

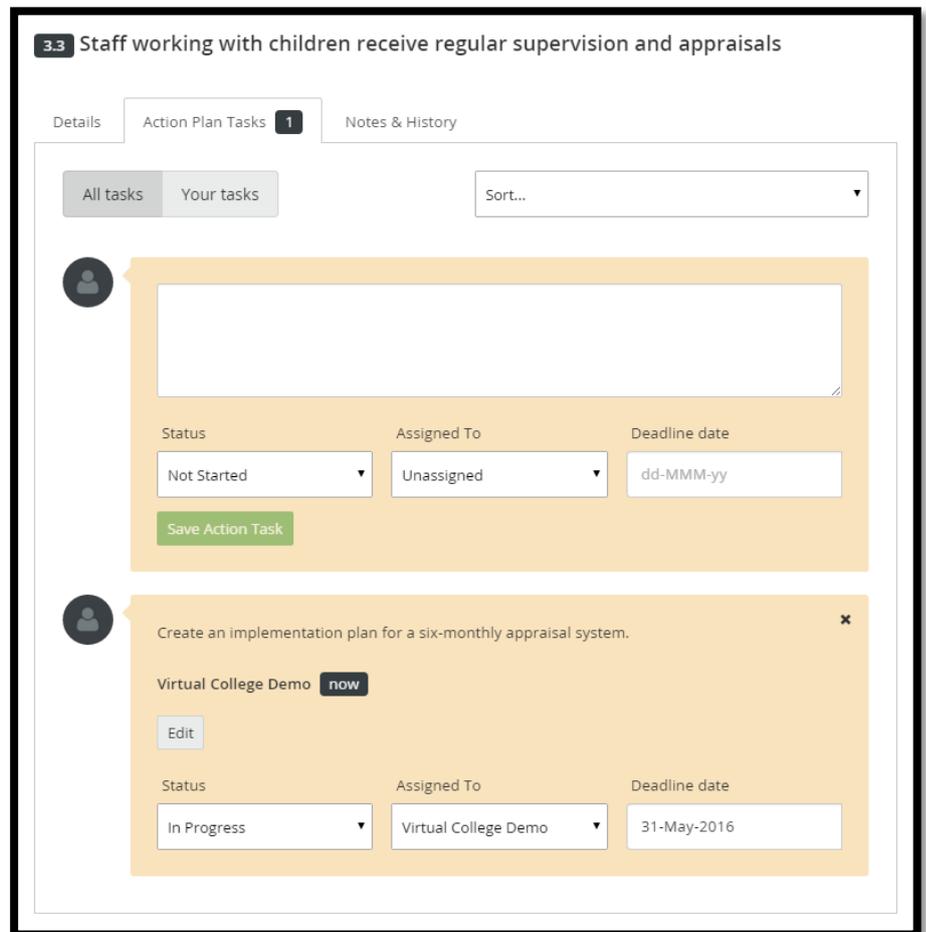
- Not Started
- No Longer Required
- In Progress
- Complete

This drop-down box allows you to assign the task to another user if they are also allocated to the audit.

Once we have written our action plan task, we click on the green “Save Action Task” button. This will save the action plan task to the question. Here we have written our task, set the status to in progress, assigned it to ourselves and set a deadline date.



We then click the green “Save Action Task” button. We can see that the action task has been added to the question. We can edit the action task by clicking the edit button or we can add a new action task by following the steps outlined above.



EDITING AN ACTION PLAN TASK

To edit an action plan task, firstly navigate to your action plan (blue bar and button at the top of the screen) and then click on the one that you would like to edit. This will open up the question and allow you to edit the action plan task.

For example, we would like to edit the action plan task for question 7.1. To do this, we click on the action plan task for question 7.1. This opens up the question for us.

From here, we can either edit the current action plan task, or add a new action plan task.

To edit an action plan task, please click on the edit button. **(If you cannot see the edit button please navigate to the next section of the guide).**

Clicking the edit button will allow you to edit the text. **Do not delete any of the text that is currently in the box.** Write the date that you are editing the task after the text already inputted into the action plan and then write your update.

7.1 Children are made aware of their right to be safe from abuse. This is achieved through information made available, for children, young people and parents about where to go for help in relation to maltreatment and abuse

Details | Action Plan Tasks 1 | Notes & History

All tasks | Your tasks | Sort...

Status: Not Started | Assigned To: Unassigned | Deadline date: dd-MMM-yy

Save Action Task

Send information pack to parents

Virtual College Demo 14 days ago

Edit

Status: In Progress | Assigned To: Virtual College Demo | Deadline date: 06-Oct-2015

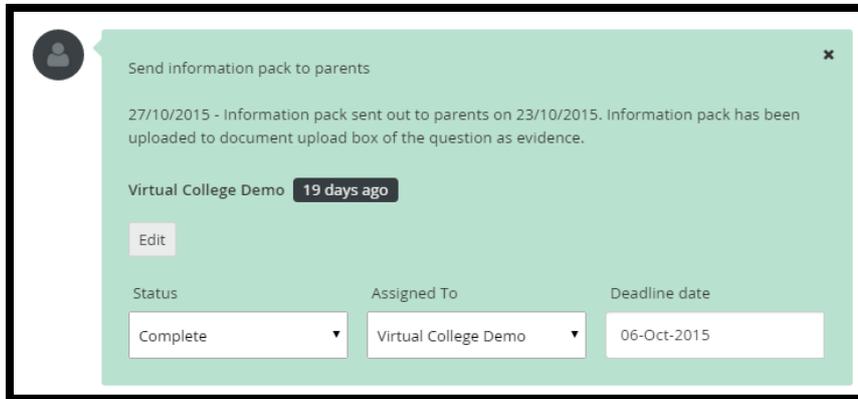
Send information pack to parents

Virtual College Demo 15 days ago

Cancel | Save

Status: In Progress | Assigned To: Virtual College Demo | Deadline date: 06-Oct-2015

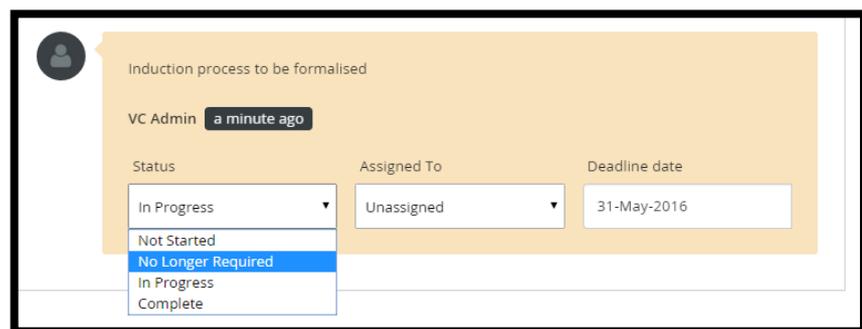
Once you have edited your action plan, please click the save button to save the changes. Below we can see that we have edited the text of the action plan task above, and changed the status to complete.



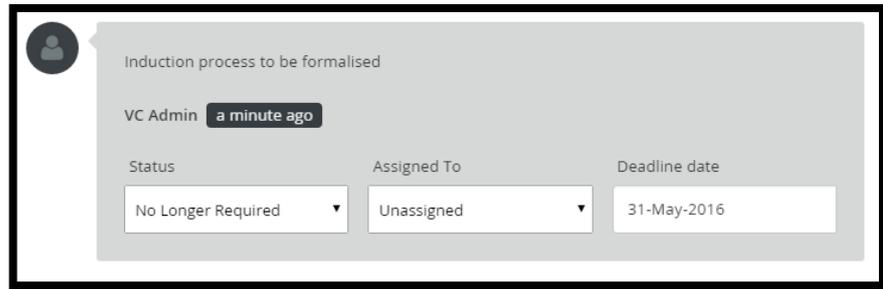
EDITING AN ACTION PLAN TASK THAT YOU HAVE NOT CREATED

The system does not allow you to edit an action plan task that you have not created. This is for security purposes as action plans are unique to those that created them. If you need to edit an action plan task and you haven't created it, for example if the user who created the action plan task has left the organisation, you will need to do the following:

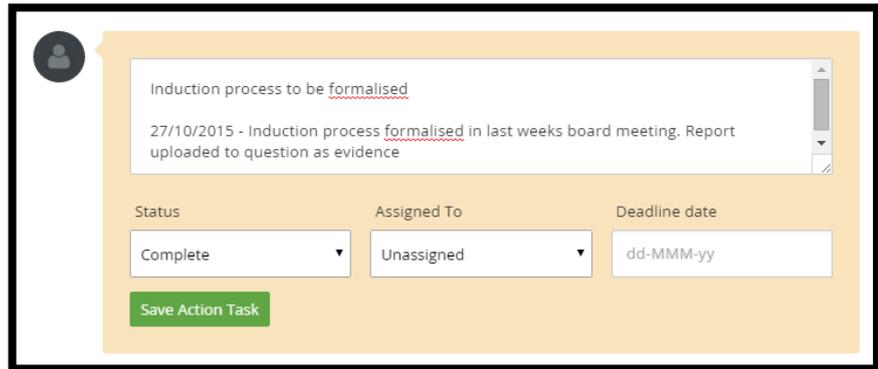
Here we have an action plan task that we cannot edit as it was created by another user. Firstly we need to set the current action plan task status to no longer required.



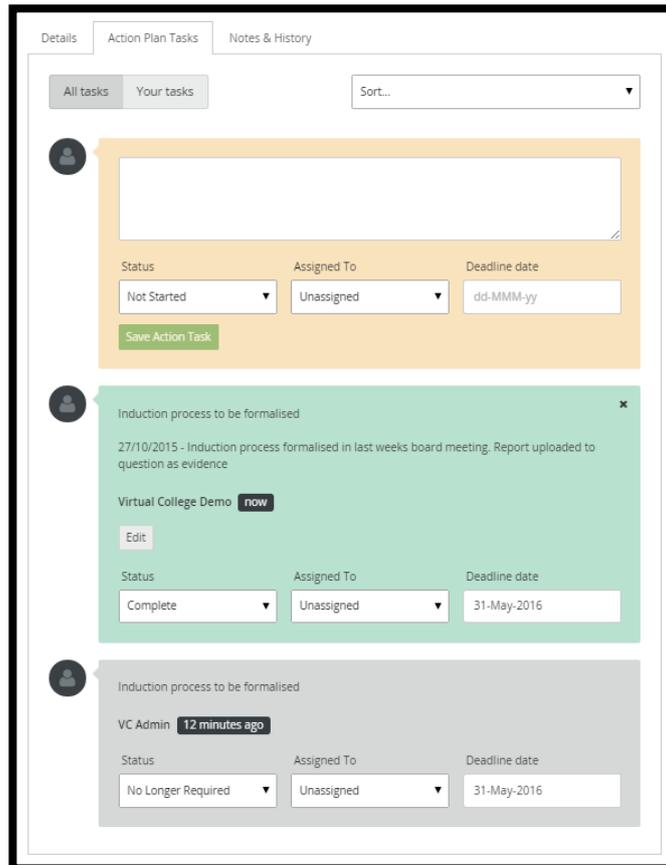
This turns the action plan task grey as we can see here.



Next we need to copy and paste the information that was written on the action plan task into a new action plan task. We can also add any extra information we want to add.

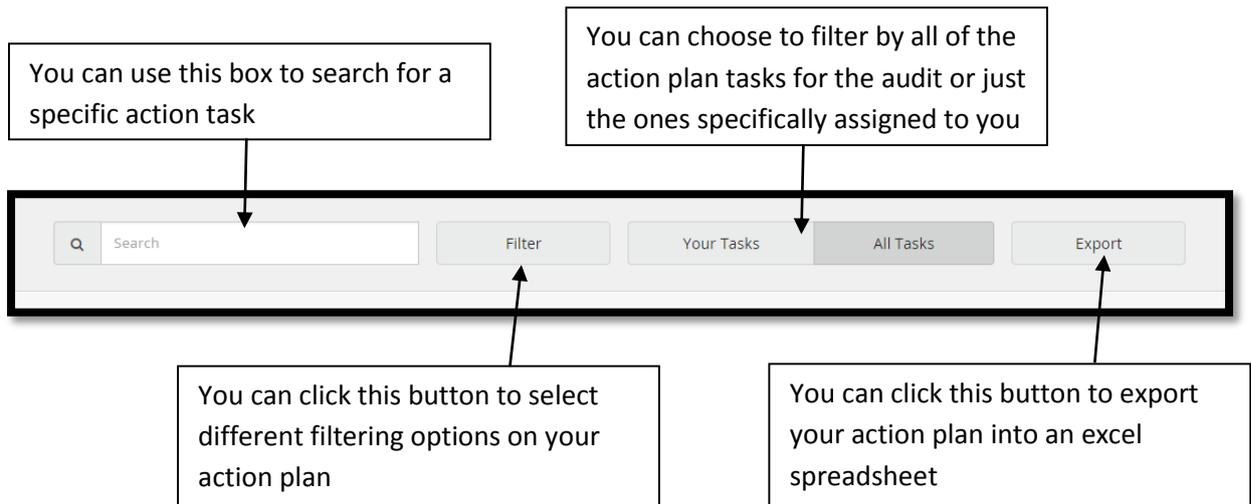


In this example, we have added an update to the task and set the status as complete.



FILTERING ACTION PLANS

You can filter your action plans to show you specific information if required. When you view your action plan, there is a toolbar across the top that allows you to search, filter and export your action plan.



Clicking on "Filter" will bring up the following options. From here we can filter by user name, deadline date or the status. For example, if we tick "Complete" and then click the green "Apply" button, the action plan will be filtered to only show the action tasks that have been marked as complete.

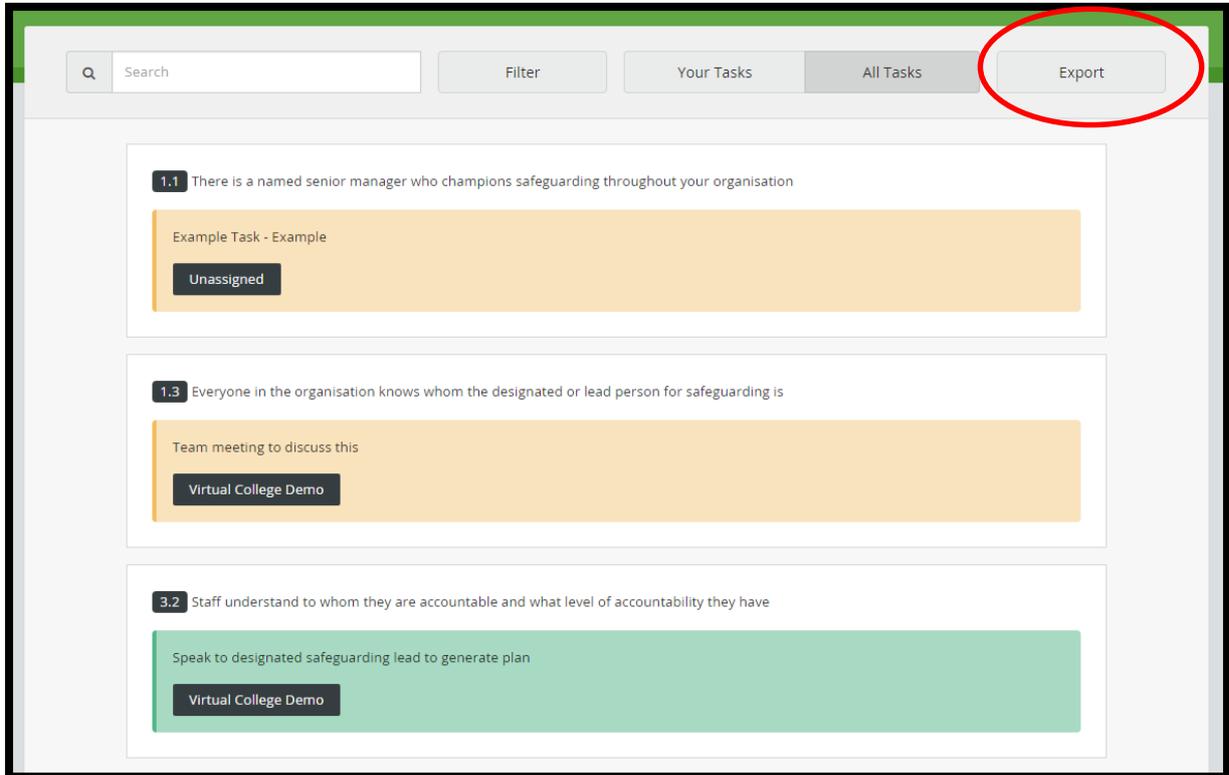
We can also apply multiple filters, for example if we tick "In Progress" and "Complete", it will show us all of the action plan tasks that have been marked as in progress or complete.

The "Filter Action Tasks" dialog box contains the following fields and options:

- Assigned to:** A text input field.
- Deadline Date:** Two date input fields labeled "From" and "To".
- Status:** A list of checkboxes:
 - Not Started
 - No Longer Required
 - In Progress
 - Complete
- Buttons:** "Cancel" and "Apply" (highlighted in green).

EXPORTING YOUR ACTION PLAN

You can export your action plan by clicking export at the top of the action plan page.



This will bring up the following box. We can edit the report name if we wish to. Clicking the green "Send Report" button will email us the action plan report in an excel spreadsheet. The email address the report is sent to is the same one that you log in with.

