Early Tree

EARLY TREE SUPPORT · GUIDE

Children and families

Adding a child, the record, contacts and onboarding

EARLY TREE VERSION
2026.11

PUBLISHED
15 November 2026

FOR
Managers, owners and administrators

ONLINE
help.earlytree.co.uk

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Screenshots show a fictional nursery and people.

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Reading the screenshots. The orange numbers 1 on a picture match the numbers in the step text, and an orange box marks the part of the screen a step is about. Every guide is also online, with search, at help.earlytree.co.uk.

CHILDREN AND FAMILIES

Children and families

WHO IT'S FOR

Manager Owner Administrator

WHERE TO FIND IT

Children & Families

Every child in Early Tree has one record: their details, their family, the people you call in an emergency and who may collect them, their health and care needs, bookings, billing and learning. Families link brothers and sisters to the same parents and carers, so you enter a parent once.

The EYFS statutory framework for group and school-based providers (effective 1 September 2026, paragraph 3.99) requires you to record, for each child: their full name and date of birth; the name and address of every parent or carer known to you; anyone else with parental responsibility; who the child normally lives with; and emergency contact details. Where possible, hold more than two emergency contact numbers for each child.

Guides in this area

Guide	When
Adding a child	A new child joins, and you're entering their details yourself
The child's record	Finding and changing a child's details
Emergency contacts and collection	Who to call, who may collect, and the collection password
Families and parent onboarding	Adding parents, and inviting them to fill in the details themselves

CHILDREN AND FAMILIES

Children: adding a child

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Manager · Owner · Administrator	**Children & Families** › **Children** › **Add Child**	About 10 minutes	Permission to change children's records

Purpose

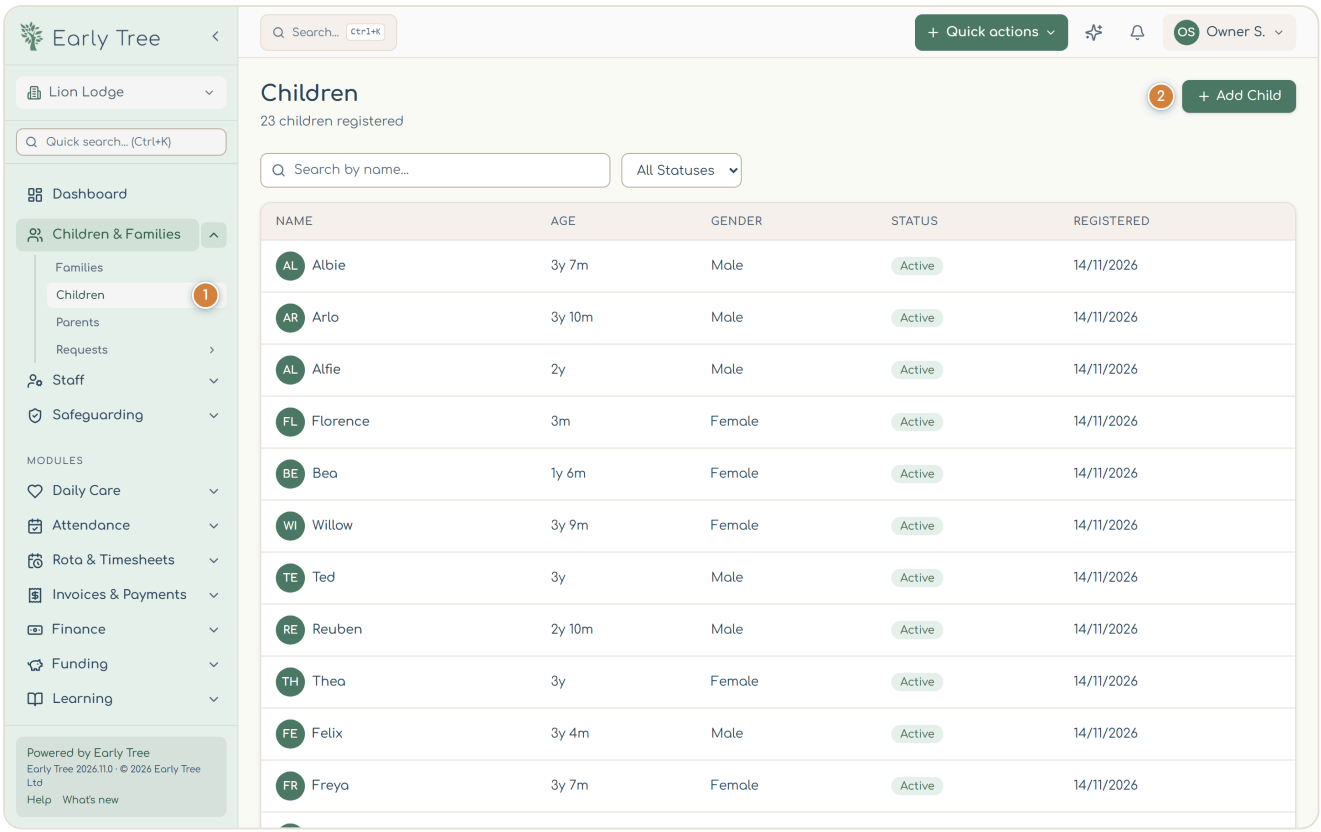
Create a child's record when a new child joins, so they can be booked in, appear on the register and be invoiced. If you'd rather the parents fill in the details themselves, invite them instead (see Families and parent onboarding).

Before you start

- Have the child's full name, date of birth and start date.
- Know whether the child has brothers or sisters at the nursery already. If they do, link the child to that family rather than creating a new one, so parents and invoices are shared.
- Have at least one emergency contact's name and phone number.

Open the form

1. In the menu, select **Children & Families**, then **Children** 1.
2. Select **Add Child** 2.

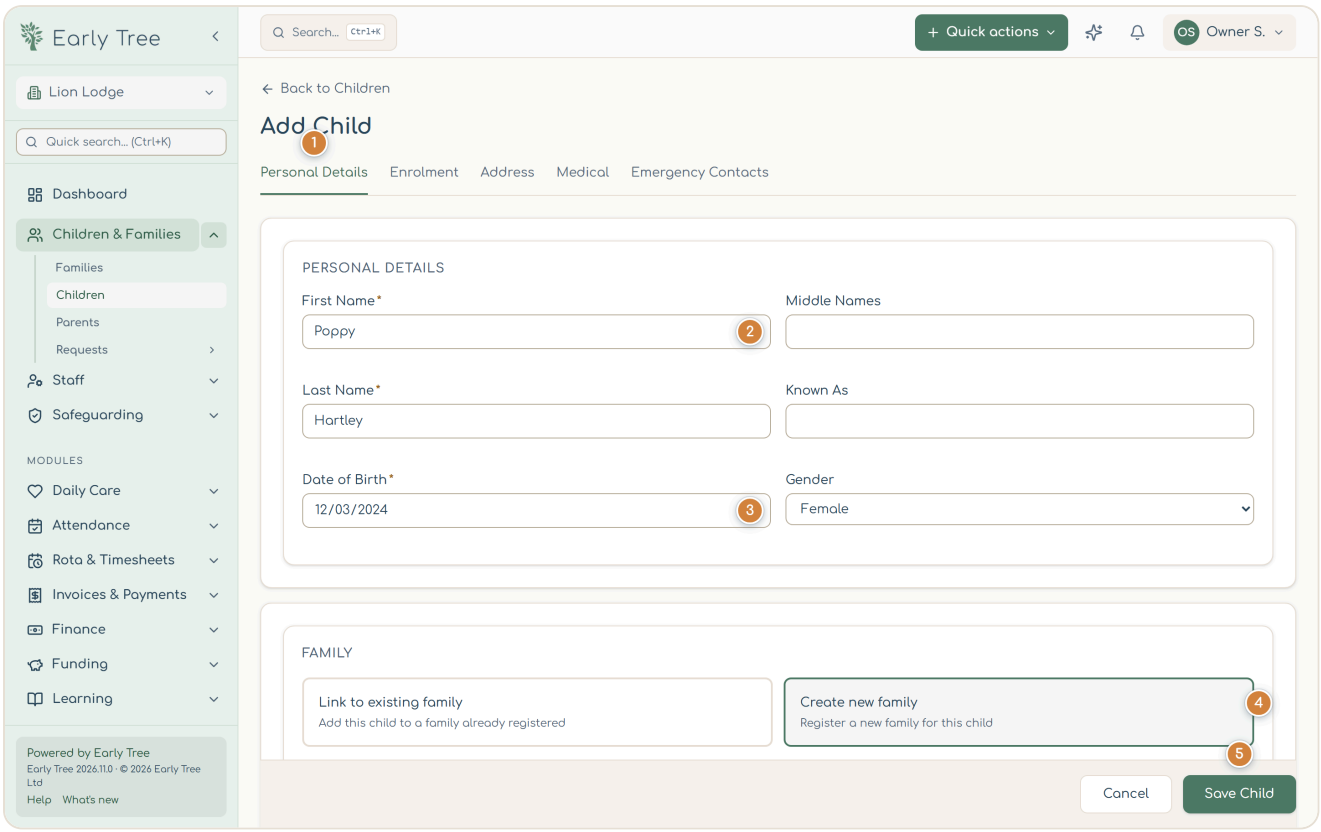


Children & Families › Children, then Add Child.

Enter the child's details

The form has five tabs (1): **Personal Details**, **Enrolment**, **Address**, **Medical** and **Emergency Contacts**. Fields marked with an asterisk (*) are required. Nothing is saved until you select **Save Child**, so you can move between the tabs freely.

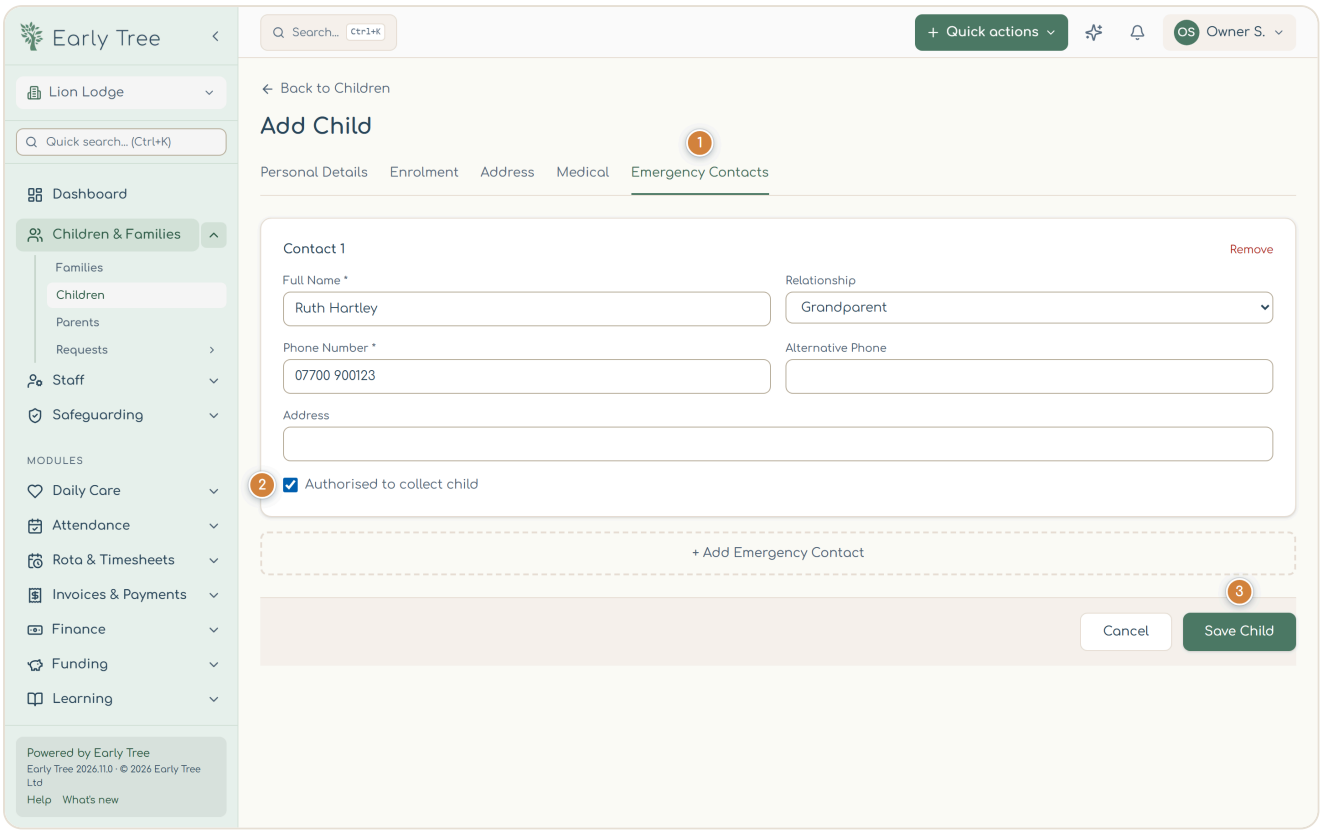
1. On **Personal Details**, enter the **First Name** (2), **Last Name** and **Date of Birth** (3). **Known As** is the name the child uses day to day, if it's different.
2. Under **Family**, choose **Link to existing family** for a brother or sister of a child you already have, or **Create new family** (4) and enter the **Family Name**. If you type a surname that matches a family you already have, Early Tree asks whether the child is related; select **Yes, link family** if they are.
3. On **Enrolment**, enter the **Start Date** and tick the nursery or nurseries the child will attend.
4. On **Address**, enter the child's home address.
5. On **Medical**, switch on **Has Allergies**, **Has Medical Conditions** or **Has Dietary Requirements** as needed and fill in the details. Record the parent's answers to **Consent to Administer Medicine** and **Consent to Emergency Treatment**.



Personal details and the family. Save Child (5) saves every tab at once.

Add emergency contacts

1. Open the **Emergency Contacts** tab 1 and select **+ Add Emergency Contact**.
2. Enter their **Full Name**, **Relationship** and **Phone Number**.
3. Tick **Authorised to collect child** 2 only if the parent has told you this person may collect the child. Leave it unticked for someone you should only phone.
4. Add more contacts the same way. Where possible, hold more than two emergency contact numbers for each child (EYFS paragraph 3.99).
5. Select **Save Child** 3.



An emergency contact who is authorised to collect.

What you should see

> The child's record opens, showing their details. They appear in **Children & Families › Children**. To put them on the register, give them a booking pattern on the record's **Bookings & funding** tab.

Common problems

Save Child does nothing and a tab shows a red dot.

A required field on that tab is empty. Open the tab with the red dot; the message under the field says what's missing.

"At least one nursery must be selected".

On **Enrolment**, tick the nursery the child will attend.

I started from a family's page, but the family isn't filled in.

Choose **Link to existing family** and pick the family again before you save.

I added the child twice.

Keep the record that has the bookings and details, and select **Deactivate** on the other one, so it no longer appears on registers or invoices.

Related guides

- The child's record
- Emergency contacts and collection
- Families and parent onboarding

CHILDREN AND FAMILIES

Children: the child's record

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Manager Room leader Practitioner	**Children & Families** › **Children** › **the child's name**	A minute or two	Access to children's records (changing them needs permission to change children's records)

Purpose

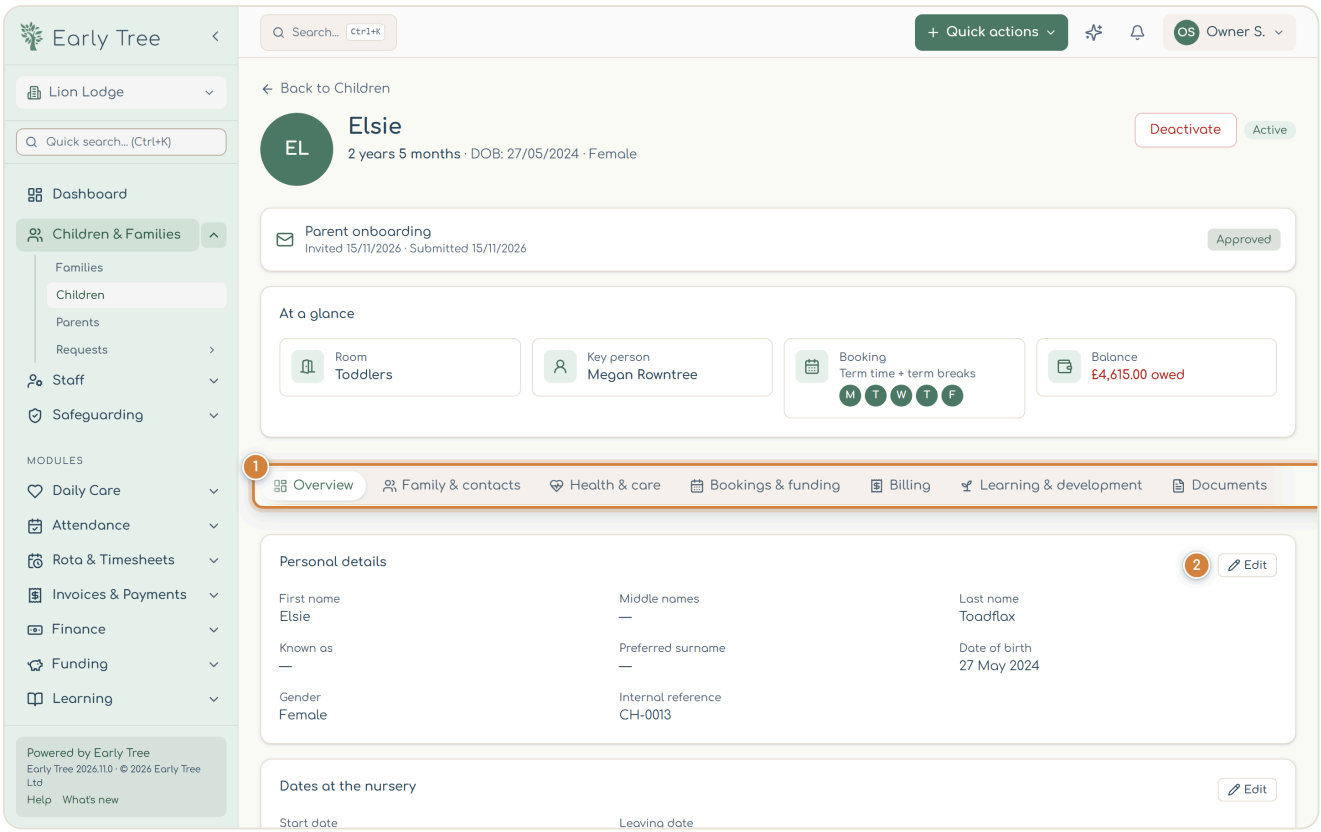
Find everything about one child in one place, and keep it up to date: a new address, a change of key person, a new allergy. You change one section at a time, so nothing else on the record is touched.

Before you start

- What you can see depends on your role. Health and other special category details (UK GDPR Article 9) are only shown to people with access to them; everyone else sees a short message instead.

Find your way around the record

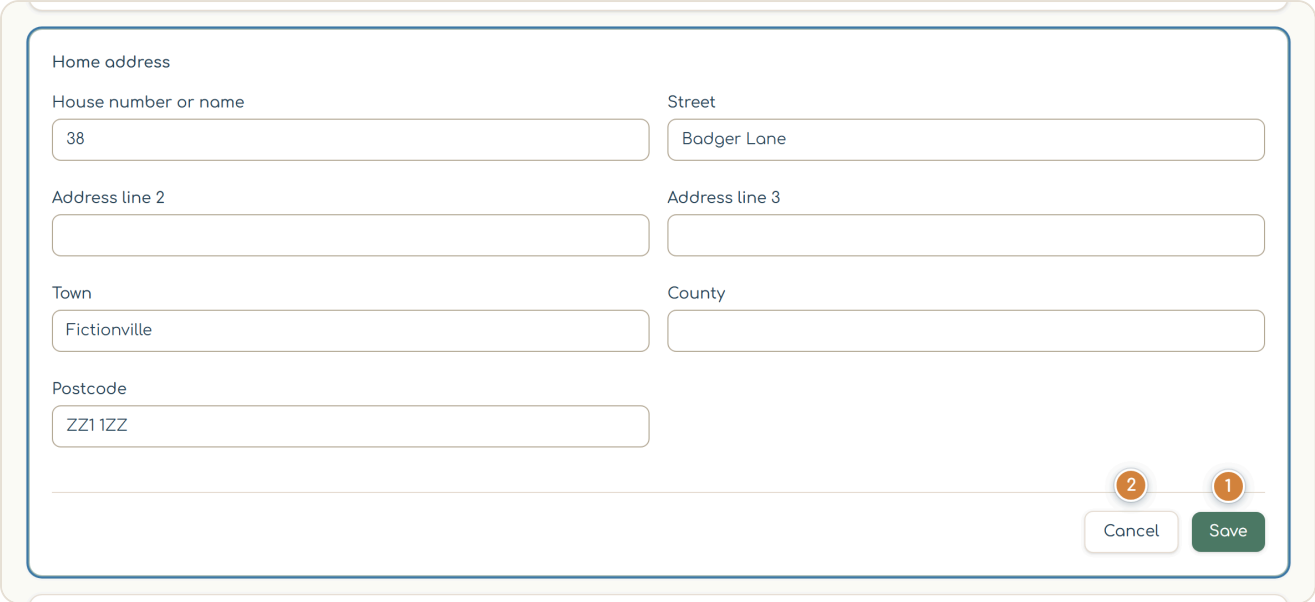
1. Open **Children & Families › Children** and select the child.
2. The top of the record shows the child's name, age and date of birth, any parent onboarding, and **At a glance**: their room, key person, booking pattern and account balance.
3. The tabs (1) split the record into **Overview**, **Family & contacts**, **Health & care**, **Bookings & funding**, **Billing**, **Learning & development**, **Documents** and **History**. You only see the tabs your role allows.



A child's record. Each section has its own Edit button (2).

Change one section

1. Find the section you need, for example **Home address** on **Overview**, and select its **Edit** button 2.
2. The section opens as a form in place. Make your changes.
3. Select **Save** 1 to keep them, or **Cancel** 2 to leave the section as it was.



Editing the home address. Only this section changes when you save.

What you should see

> The section closes, shows your changes, and **Saved** appears briefly. The rest of the record is unchanged.

The key person

Every child must be assigned a key person (EYFS paragraph 3.42). The key person shows in **At a glance**. To change it, on **Overview** use the **Key Workers** card: **+ Assign Key Worker**, then **Make Primary** for the main key person. Early Tree suggests at least two key workers, so there is always someone the child knows when one is away.

Common problems

There's no Edit button.
Your role can see this section but not change it. Ask your manager.

Another section won't open for editing.
Only one section can be open at a time. Save or cancel the one that's open first.

A tab or section I need is missing.
It's limited to certain roles (for example health and safeguarding details). Ask your manager if you need access.

The child has left.
Set their **Leaving date** under **Dates at the nursery**. Use **Deactivate** only for a record that shouldn't be used at all.

Related guides

- Emergency contacts and collection
- Adding a child

CHILDREN AND FAMILIES

Children: emergency contacts and collection

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Manager · Room leader · Practitioner	**Children & Families** › **Children** › **the child's name** › **Family & contacts**	A few minutes	Permission to change children's records

Purpose

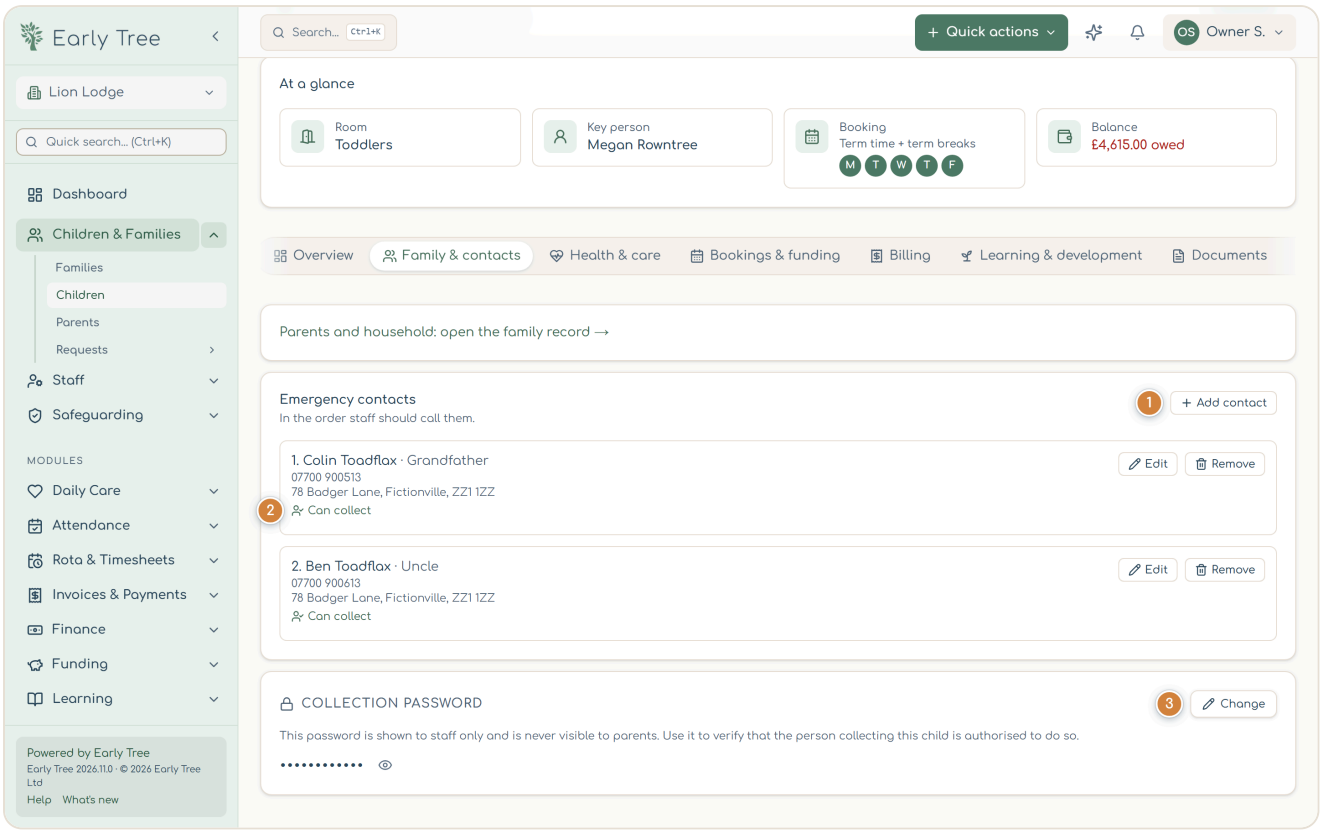
Make sure staff know who to call in an emergency, and who may collect each child. Children may only be released into the care of individuals the parent or carer has explicitly notified to you (EYFS paragraph 3.89). The people you mark here are the ones offered at sign-out on the register.

Before you start

- Only add or change who can collect a child on the parent's or carer's instruction, and follow your nursery's own procedure for confirming it.
- Parents themselves are managed on the family's page (see Families and parent onboarding).

Add or change an emergency contact

1. Open the child's record and select the **Family & contacts** tab.
2. Under **Emergency contacts**, select **Add contact** (1), or **Edit** next to an existing contact.
3. Enter their **Name**, **Relationship** and **Phone**. **Call order** sets who staff ring first.
4. Switch on **Can collect the child** only if the parent has told you this person may collect. Each contact then shows **Can collect** (2) or **Can't collect**.
5. Select **Save contact**.



Emergency contacts, who can collect, and the collection password.

Set the collection password

A collection password lets staff check that an adult collecting the child is someone the parent has authorised. It's shown to staff only, never to parents through Early Tree, and appears (hidden) at sign-out on the register.

1. On the **Family & contacts** tab, find **Collection Password** and select **Set Password**, or **Change** 3 if there is one.
2. Type the password the parent has given you, and select **Save**. To remove it, select **Clear Password**.

What you should see

> The contact appears in the list in call order with **Can collect** or **Can't collect**, and the password shows as dots, with an eye button to reveal it. At sign-out, the contacts who can collect appear as cards to choose from.

Common problems

An adult arrives to collect who isn't listed.
Don't release the child. Follow your nursery's collection procedure and speak to the parent before anything else.

Remove asks me to confirm.
Removing a contact can't be undone from the record; check you've chosen the right person, then confirm.

The Phone field won't save.
Use digits, spaces and + only, for example 07700 900123.

Related guides

- Registers: signing children in and out
- The child's record

CHILDREN AND FAMILIES

Children: families and parent onboarding

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Manager · Owner · Administrator	**Children & Families** › **Families** › **the family**	A few minutes	Permission to change children's records; reviewing onboardings needs permission to review change requests

Purpose

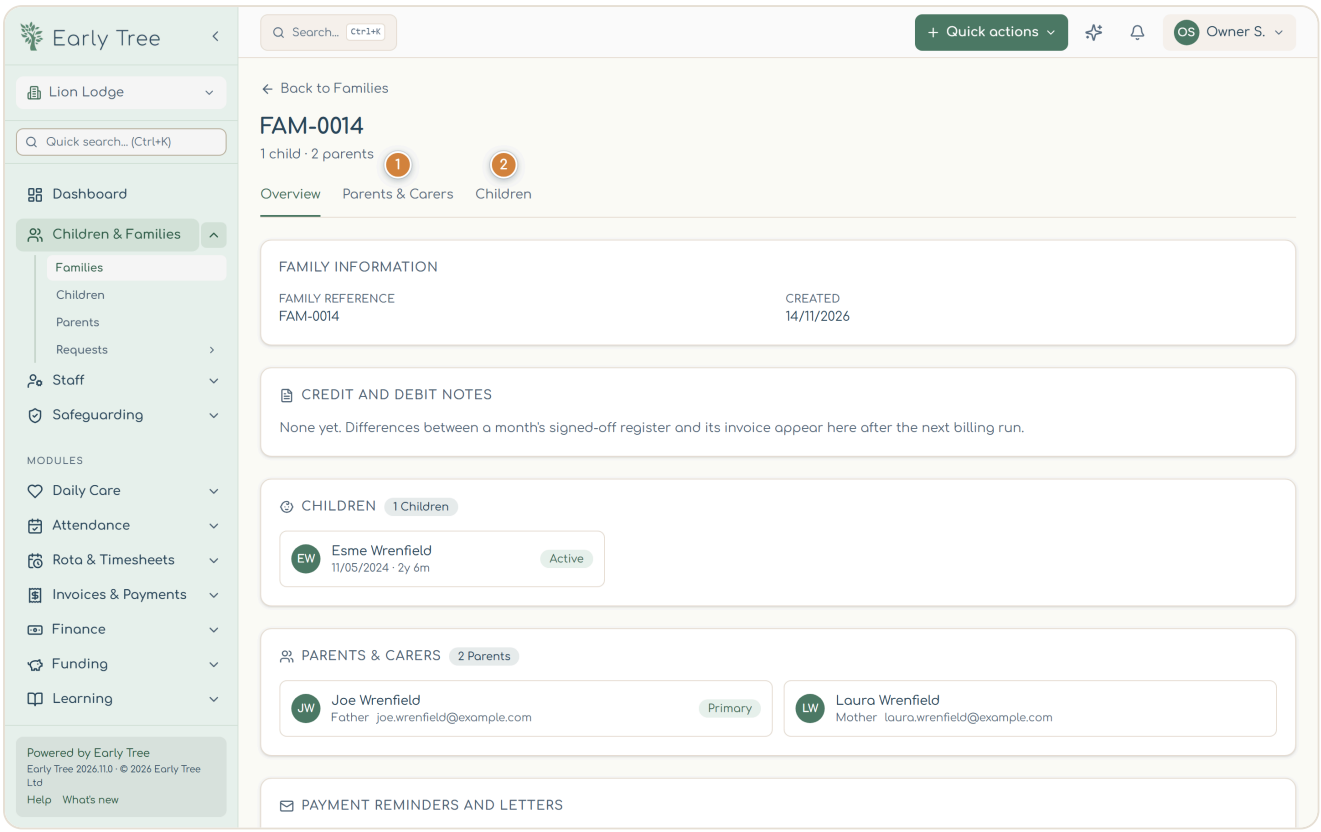
A family links brothers and sisters to the same parents and carers. You can add a new child yourself, or invite a parent to fill in the details (and consents) in the parent portal, then review what they send before it goes onto the child's record.

Before you start

- To invite a parent, they need an online account. On the family's **Parents & Carers** tab, a parent shows **Has Account** or **No Account**; for **No Account**, open the parent and select **Create Online Account** (it needs their email address).

The family's page

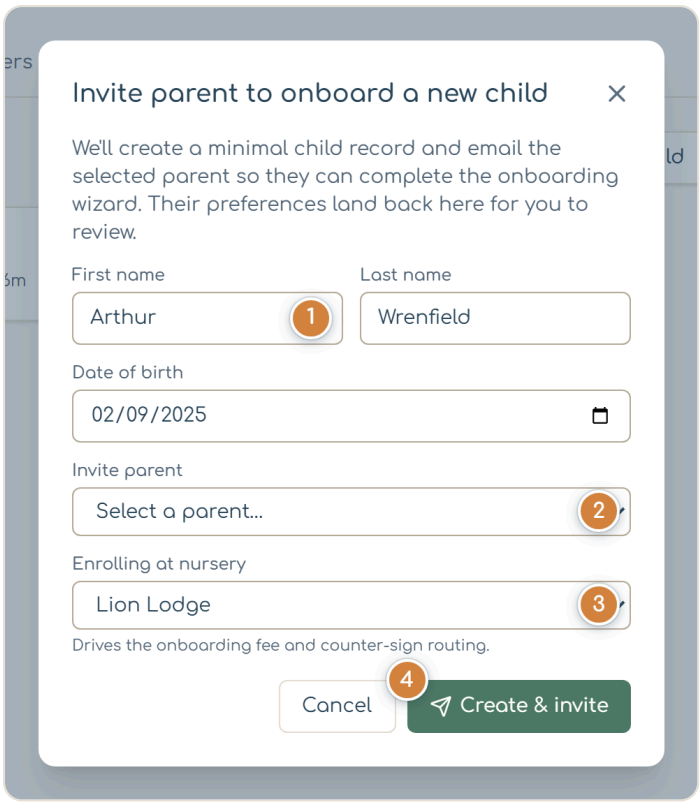
1. Open **Children & Families** › **Families** and select the family.
2. **Overview** shows the family reference, its children and its parents and carers.
3. **Parents & Carers** (1) lists each parent, who is the **Primary Contact**, and whether they have an online account. Select **Add Parent** to add one.
4. **Children** (2) lists the family's children, with **Register New Child** and **Invite parent to onboard**.



A family's page: its children and its parents and carers.

Invite a parent to onboard a new child

1. On the family's **Children** tab, select **Invite parent to onboard**.
2. Enter the child's **First name** 1, **Last name** and **Date of birth**.
3. Under **Invite parent** 2, choose the parent who will fill it in.
4. Under **Enrolling at nursery** 3, choose the nursery.
5. Select **Create & invite** 4.



Early Tree creates a minimal record and emails the parent.

What you should see

The child's record opens with a **Parent onboarding** banner showing it's been invited. When the parent submits, the onboarding appears in **Children & Families › Requests › Onboarding** under **Awaiting review**.

Review what the parent sent

1. Open **Children & Families › Requests › Onboarding**, then the child.
2. Check what the parent has entered.
3. Select **Approve** to copy it onto the child's record, or **Send back** with a note saying what to change. **Waitlist** and **Reject** are there for children you can't take yet, or at all.

After approval, the page says **Onboarding approved — all submitted data has been copied to the child record.**

Common problems

The parent I want isn't in the Invite parent list.

They don't have an online account yet. Create one from their parent page, then invite them.

The invite says a child with the same name exists.

Check it isn't the same child. For twins with the same name, tick the box to create a second record anyway.

Related guides

- Adding a child
- The child's record