BEACON HELP · GUIDE

Inspections

Planning, carrying out and submitting an inspection



BEACON VERSION
2026.11

PUBLISHED
25 November 2026

FOR
Area support managers, area support leads and inspectors

ONLINE
help.beacon.earlytree.co.uk

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Screenshots show a fictional nursery group and people.

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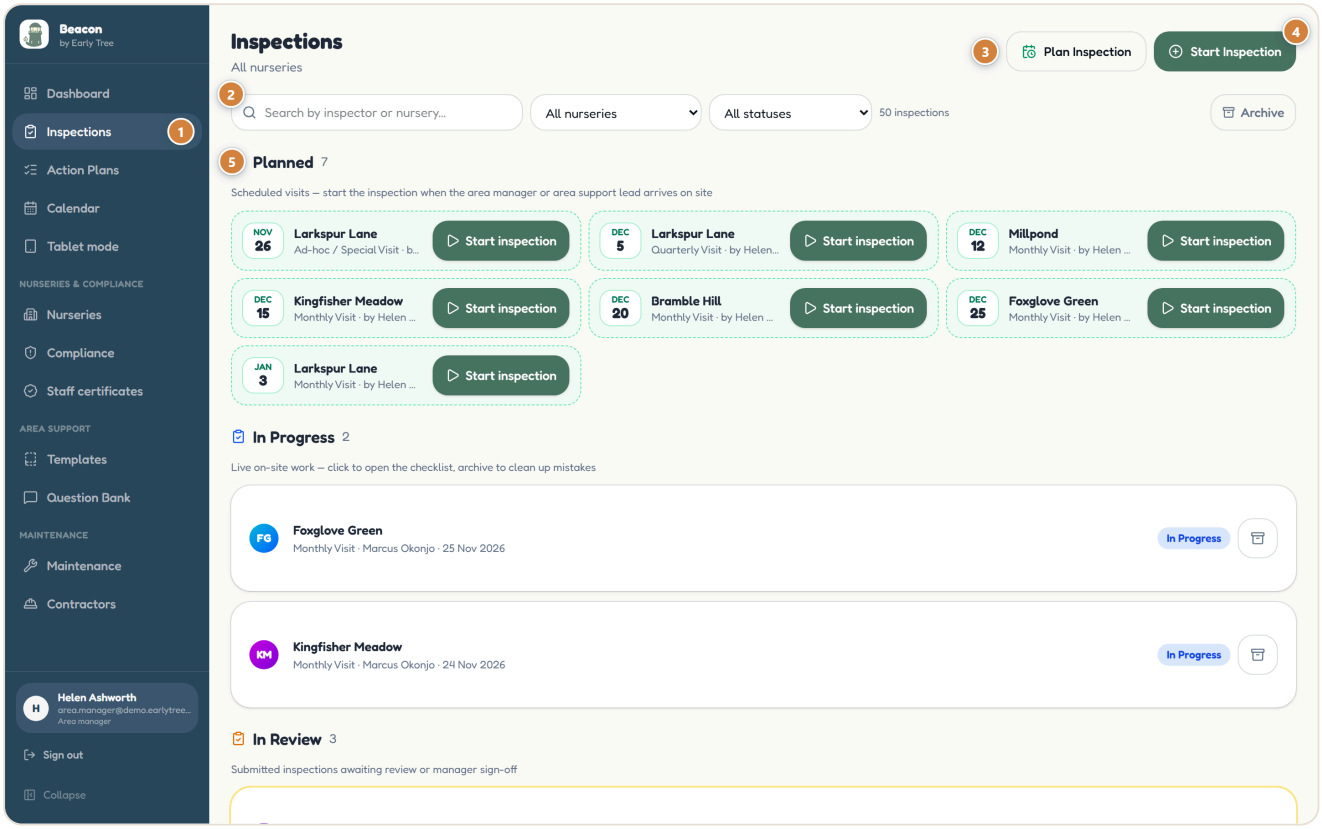
Related guides 48

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.beacon.earlytree.co.uk.

INSPECTIONS

About inspections

An inspection in Beacon is an internal quality visit to one nursery. The inspector walks round the nursery with a checklist, room by room, answers each item, takes photos, records temperature readings, notes maintenance problems and talks to staff. When the visit is finished they submit it, and it moves on to review and sign-off.



The Inspections page groups visits by stage: planned, in progress, in review and signed off.

The stages of an inspection

Stage	What it means	Where you'll see it
Planned	A date has been pencilled in. Nothing has been inspected yet.	The **Planned** section of the Inspections page, the dashboard and the calendar
In Progress	Someone is on site answering the checklist.	The **In Progress** section
In Review	The inspection has been submitted. A draft report exists and is being reviewed.	The **In Review** section, with a status such as **Review Required**, **Under Review**, **Awaiting Approval** or **Rework Required**
Signed off	An area support manager has signed the report off. It's locked, and its PDFs and action plan are ready.	The **Signed off** section, with the result, such as **Pass · 86%**

Review and sign-off are covered in Review and sign-off.

Who does what

- **Area support managers** plan visits, start and carry out inspections, review them and sign them off. They can also archive an inspection started by mistake.
- **Area support leads** start and carry out inspections and review them, then send the report to an area support manager for approval.
- **The main inspector** named on a visit can answer its checklist and submit it, whatever their role.
- **Read-only auditors** can look at visits in progress and in review, but can't change anything.
- **Nursery managers, room leaders and maintenance managers** don't see a visit until its report is signed off. Then they can read the report and work on the action plan.

Visit types

Each inspection is one of five visit types. The type decides which checklist items are included, because every item in the template has a frequency.

Visit type	Includes
Monthly Visit	Items checked on every visit, plus the monthly items
Quarterly Visit	Everything in a monthly visit, plus the quarterly items
Biannual Visit	Everything in a quarterly visit, plus the six-monthly items
Annual Visit	Everything in a biannual visit, plus the yearly items. The most thorough regular visit
Ad-hoc / Special Visit	Every item, whatever its frequency. For unscheduled visits, follow-ups after an incident or deep dives

How the score works

Every checklist item has a weight. Beacon adds up the weights of the items marked **Pass** and divides by the weights of all the items marked **Pass** or **Fail**. Items marked **N/A**, and items left unanswered, don't count either way. The percentage gives the result:

Score	Result
80% or more	**Pass**
50% to 79%	**Fail**
Under 50%	**Immediate Action**

While you're inspecting, the panel beside the checklist shows the **Predicted outcome** as you go.

Guides in this section

- The inspections list
- Planning an inspection
- Starting an inspection
- Carrying out an inspection room by room
- Photos and temperature readings
- Logging maintenance during an inspection
- Staff interviews
- Inspection notes
- Working without a connection
- Submitting an inspection
- Archiving an inspection started by mistake

INSPECTIONS

Inspections: the inspections list

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager, Area support lead, Nursery manager, Everyone	**Inspections**	A minute	Any role. What you see depends on your role and nurseries

Purpose

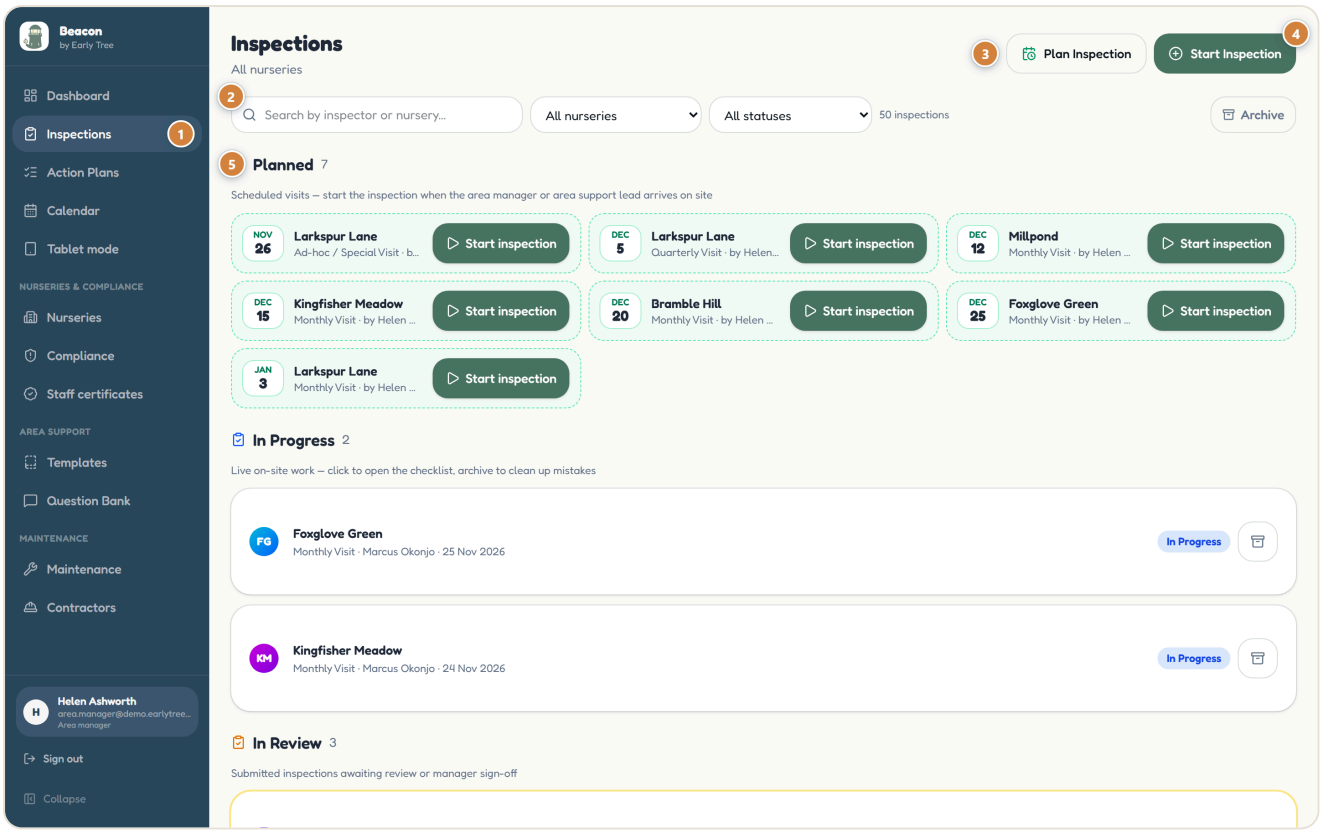
Find a visit quickly and see where it has got to: planned, being carried out, being reviewed or signed off.

Before you start

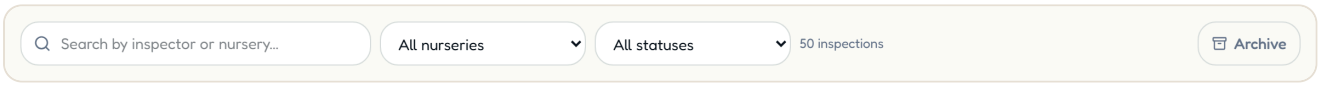
- You can see inspections for the nurseries you've been given access to. Area support staff with group-wide access see every nursery.
- Area support managers, area support leads and read-only auditors see visits before they're signed off (auditors can only look). Everyone else sees signed-off reports only, in one list.

Open the list

1. In the menu, select **Inspections** 1.
2. To find a visit, type an inspector's name or a nursery in the search box 2. You can also choose a nursery and a status from the lists next to it.
3. Area support managers and leads see **Plan Inspection** 3 and **Start Inspection** 4 at the top. See Planning an inspection and Starting an inspection.
4. Visits are grouped by stage, starting with **Planned** 5. Select a visit to open it.



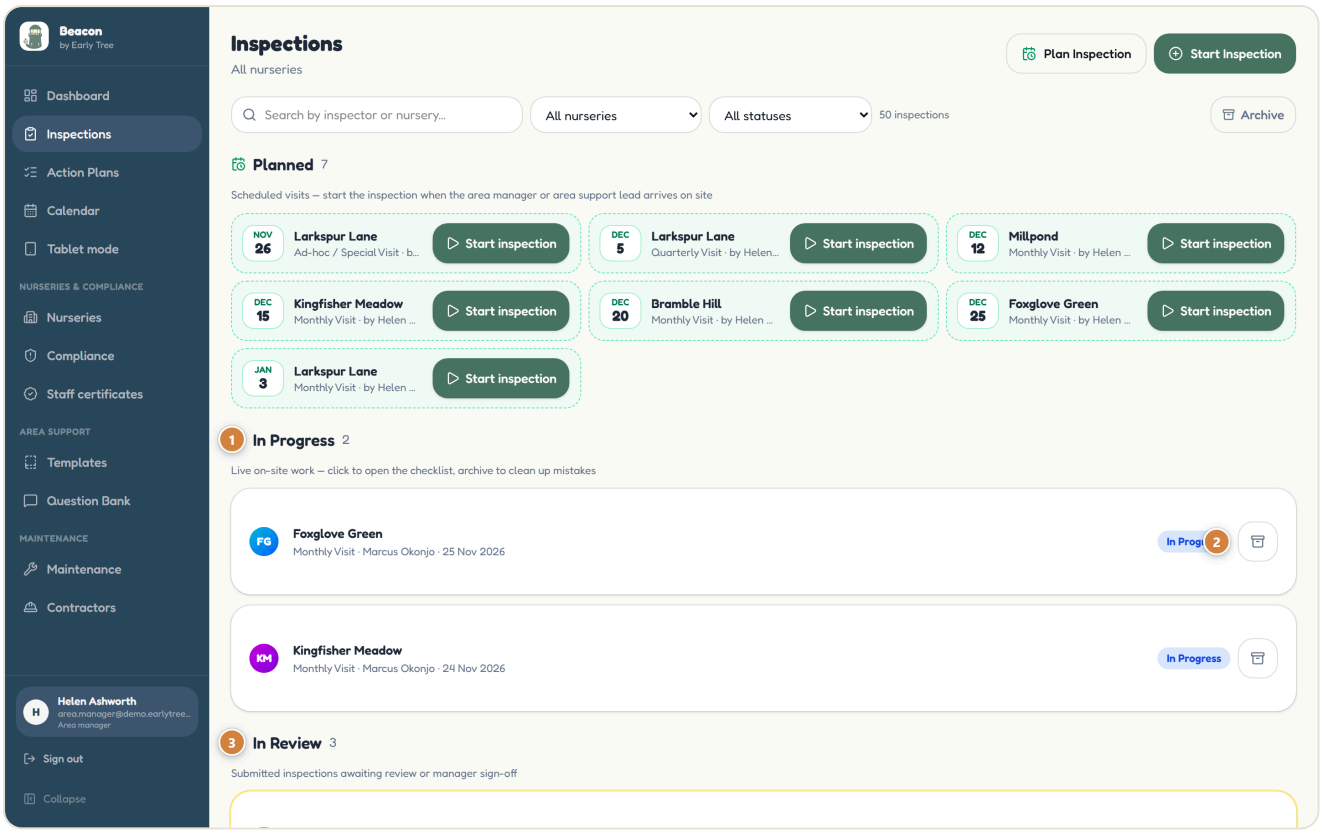
The Inspections page for an area support manager.



Search and filter the list here. Archive is for area support managers only.

The sections

1. **Planned**: visits with a date pencilled in. **Start inspection** starts the visit. A planned visit disappears from this list once a real inspection at the same nursery has started within seven days either side of its date.
2. **In Progress** (1): visits being carried out now. Area support managers see an archive button (2) on each one, for visits started by mistake.
3. **In Review** (3): submitted visits. The coloured label shows where the review has got to: **Review Required**, **Under Review**, **Awaiting Approval** or **Rework Required**. Rework Required visits are listed first.
4. **Signed off**: finished reports, with their result and score. This section is split into pages; use the page numbers at the bottom.



Visits in progress and in review.

What you should see

> Choosing a nursery or a status changes the list straight away, and **Filtering by:** shows what you've chosen, with a cross to remove each one. When you filter by status, the list is no longer grouped into sections: it's one list, newest first.

Where a visit opens

What happens when you select a visit depends on its stage and your role:

- An inspection **in progress** opens its checklist (area support staff and the visit's main inspector only).
- An inspection **in review** opens the review page (area support managers and leads only).
- A **signed-off** inspection opens its report.

Common problems

I can't see a visit a colleague is doing.

Only area support managers and leads see visits before they're signed off. If you're one of them, check the nursery and status filters, and clear the search box.

There's no Plan Inspection or Start Inspection button.

Only area support managers and leads can plan and start inspections.

A planned visit has gone from the list.
An inspection at that nursery started within a week of the planned date, so Beacon treats the plan as done. It may still show on the dashboard.

The list says "No inspections match these filters".
Select the cross next to each filter under **Filtering by:** to clear them.

Related guides

- About inspections
- Planning an inspection
- Archiving an inspection started by mistake
- About review and sign-off

INSPECTIONS

Inspections: planning an inspection

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager	**Inspections** › **Plan Inspection**	A minute	Area support manager

Purpose

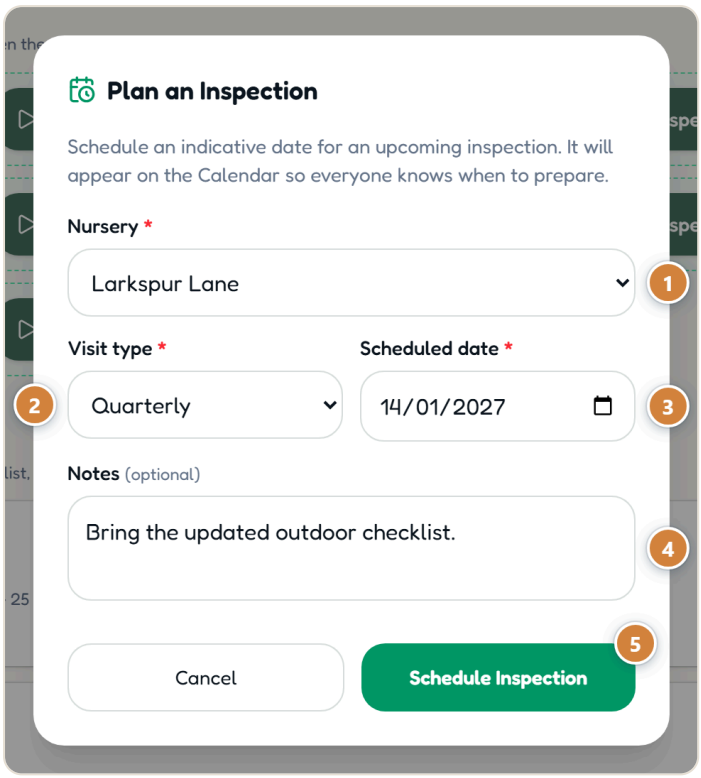
Put an indicative date in for a nursery's next visit, so the visit shows on the calendar and the dashboard and the nursery knows when to expect you. A planned visit is only a reminder: nothing is inspected until you start it on the day.

Before you start

- You're an area support manager. Area support leads see the **Plan Inspection** button, but Beacon only saves a plan made by an area support manager (see Common problems).
- The nursery is set up and active in Beacon.

Plan a visit

1. In the menu, select **Inspections**, then **Plan Inspection** at the top of the page.
2. Choose the **Nursery** 1.
3. Choose the **Visit type** 2: Monthly, Quarterly, Biannual, Annual or Ad-hoc. It decides which checklist items the visit will include when you start it (see About inspections).
4. Choose the **Scheduled date** 3.
5. If there's anything to remember for the visit, type it in **Notes** 4. Notes show on the planned visit for everyone who can see it.
6. Select **Schedule Inspection** 5.



Planning a quarterly visit.

What you should see

> Beacon shows **Inspection scheduled and added to the Calendar**. The visit appears in the **Planned** section of the Inspections page, on the calendar and in **Planned inspections** on the dashboard, with **Start inspection** next to it.

Start a planned visit

On the day, select **Start inspection** next to the planned visit, on the Inspections page or the dashboard. Beacon opens **Start New Inspection** with the nursery and visit type filled in. See Starting an inspection. Starting the inspection removes the planned visit, because the real one takes its place.

Change or remove a planned visit

A planned visit can't be edited. To move it to another date, remove it and plan it again.

1. In the menu, select **Calendar** and find the planned visit.
2. Select the bin (**Delete planned inspection**) on the visit. Only area support managers see it.

See Calendar for more about the calendar.

Common problems

I'm an area support lead and I see "Area Support Manager role required".
Only area support managers can plan visits, although the button shows for leads too. Ask an area support manager to plan it, or start the inspection on the day.

The nursery isn't in the list.
You can only plan visits for nurseries you have access to, and only active nurseries are listed. Ask your Beacon administrator.

The planned visit disappeared from the Inspections page.
An inspection at the same nursery started within seven days of the planned date, so Beacon hides the plan there.

Related guides

- Starting an inspection
- The inspections list
- Calendar

INSPECTIONS

Inspections: starting an inspection

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead	**Inspections** › **Start Inspection**	A minute	Area support manager or area support lead

Purpose

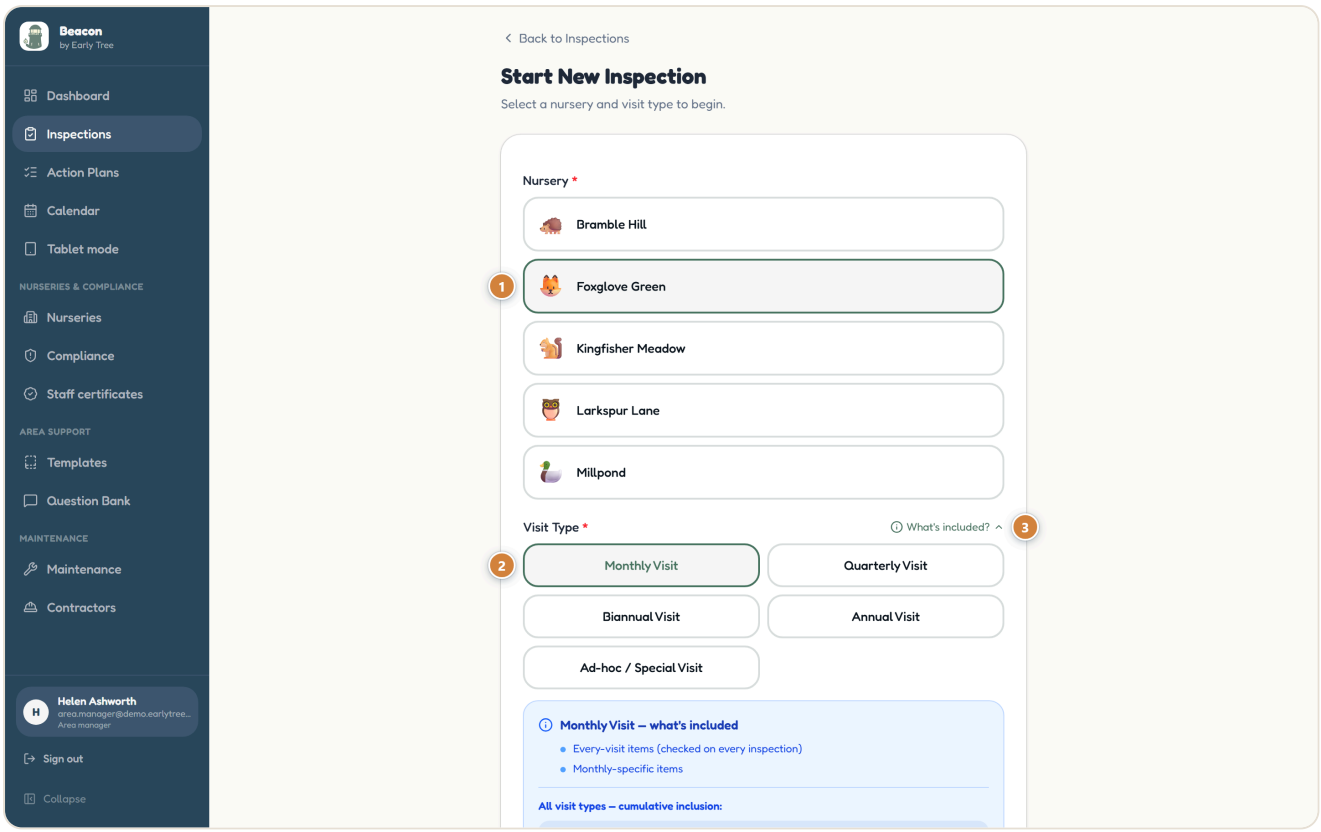
Start the visit when you arrive at the nursery, so Beacon builds the checklist for that nursery's rooms and areas and the visit's date and team are recorded.

Before you start

- You're an area support manager or area support lead with access to the nursery.
- The nursery's rooms and areas are set up in Beacon (Nursery Wide, Kitchen, Office, Outdoor and each room). Checklist items are created for each matching area, so a missing area means missing items. See Nurseries.
- Start the inspection on the day of the visit: its start time is used for the time-on-site figure.

Choose the nursery and visit type

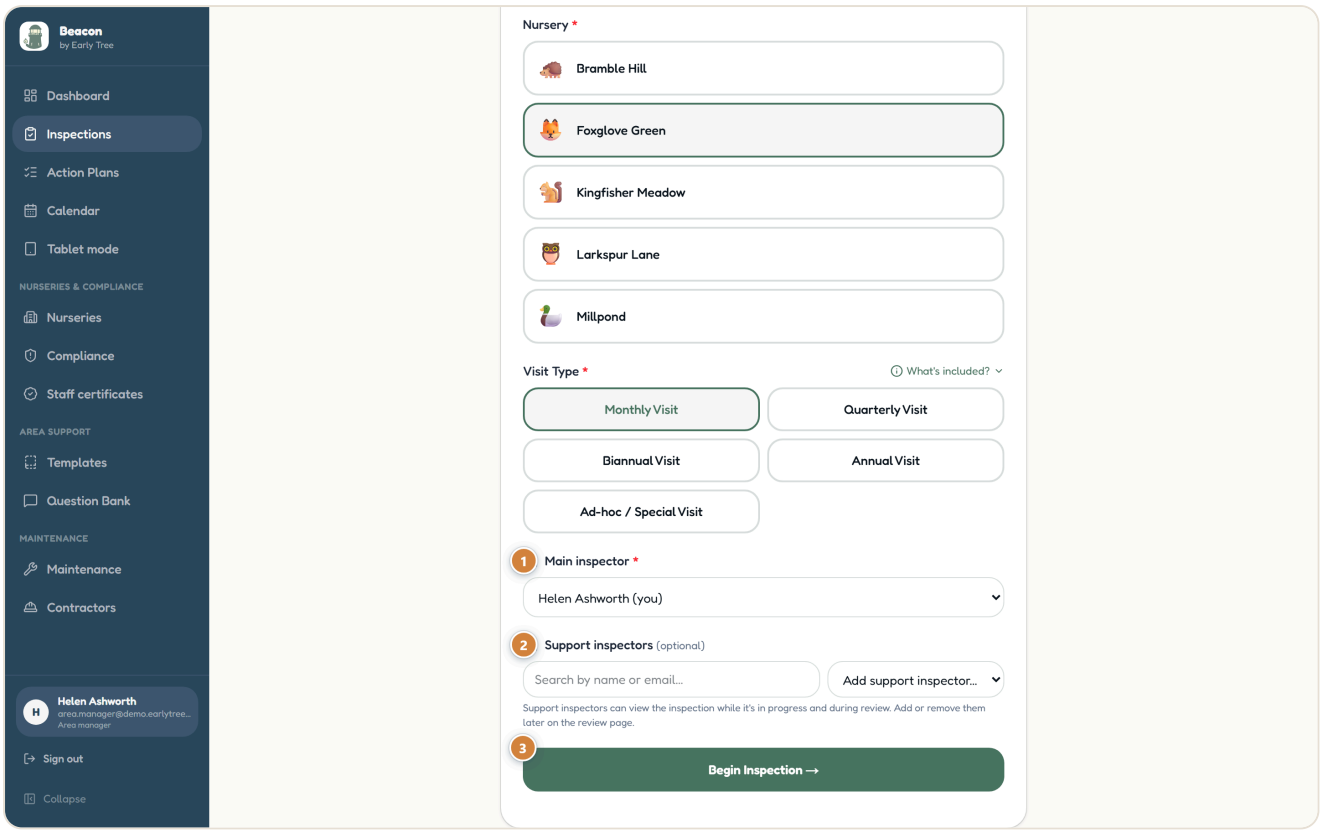
1. In the menu, select **Inspections**, then **Start Inspection**. The dashboard's **Start inspection** button opens the same page.
2. Under **Nursery**, select the nursery you're visiting 1.
3. Under **Visit Type**, select the type of visit 2. Select **What's included?** 3 to see which items each type adds.



Choose the nursery and the visit type.

Name the inspection team

1. Under **Main inspector** 1, check the person leading the visit. It starts as you. The main inspector can answer the checklist and submit the inspection, whatever their role.
2. If colleagues are visiting with you, add them under **Support inspectors** 2: search by name or email and choose them from the list. Select the cross on a name to take it off. Support inspectors can open the visit (it's under **Visits you're on** on their Inspections page, and in tablet mode) and record answers, photos, maintenance notes, interviews and notes while it's in progress. The main inspector or area support submits it.
3. Select **Begin Inspection** 3.



The main inspector, support inspectors and Begin Inspection.

What you should see

> Beacon opens the inspection's checklist, with a card for each area of the nursery. The inspection now shows in the **In Progress** section of the Inspections page and on the dashboard. See Carrying out an inspection room by room.

If Beacon warns about missing area types

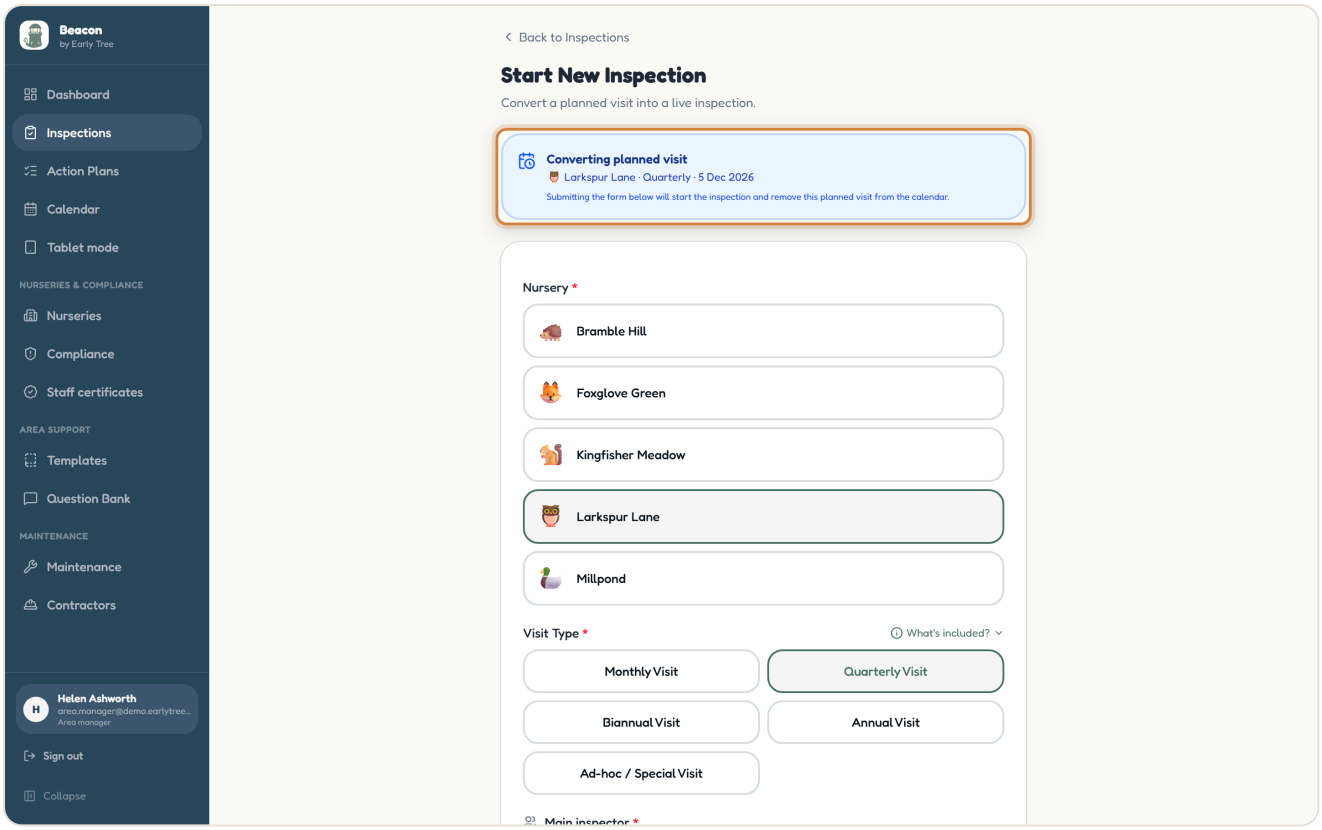
When you choose a nursery and visit type, Beacon checks the nursery has an area for every kind of item due. If it doesn't (for example, there are kitchen items but no Kitchen area), you'll see **Missing area types**, with how many items will be left out.

- To include those items, add the missing area to the nursery first. See Nurseries.
- To carry on without them, tick **I understand — proceed without these items**. **Begin Inspection** stays greyed out until you do.

Start from a planned visit

If the visit was planned, select **Start inspection** next to it on the Inspections page or the dashboard. **Start New Inspection** opens with the nursery and visit type filled in, and a **Converting planned visit** box shows which plan you're starting, with its notes. Check the team and select **Begin Inspection**. The

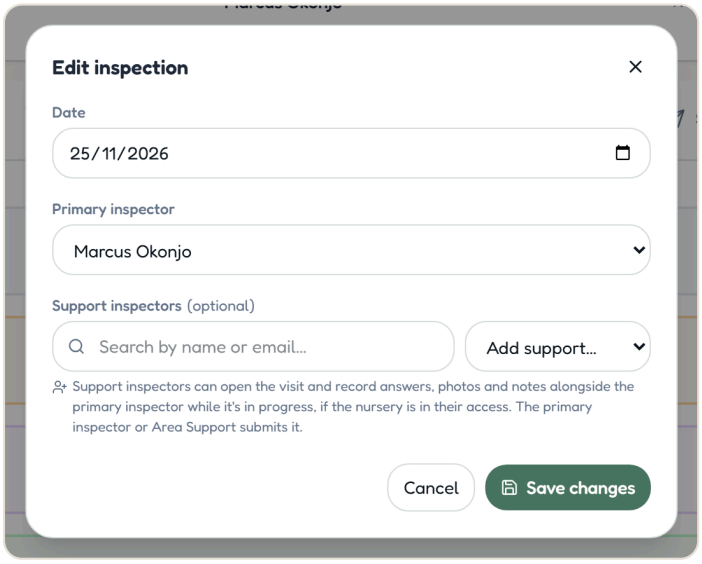
planned visit is then removed from the calendar.



Starting a planned visit.

Change the date or team later

Area support managers and leads can change the date, the main inspector and the support inspectors until the report is signed off. On the inspection, select **Edit** on the card at the top, make the changes and select **Save changes**.



The Edit inspection window.

Common problems

There's no Start Inspection button.
Only area support managers and area support leads can start inspections.

The nursery isn't listed.
Only active nurseries you have access to are listed. Ask your Beacon administrator.

Begin Inspection is greyed out.
Beacon is still checking the nursery's areas ("Checking areas…"), or it found missing area types and you haven't ticked **I understand — proceed without these items**.

A support inspector can't open the checklist.
They need access to the nursery: a support inspector from another nursery can't open its visit. Give them the nursery in Users & Roles, or make the person who'll answer the checklist the main inspector. Support inspectors also can't open a visit once it's been submitted.

I started the wrong nursery or visit type.
Visit type and nursery can't be changed after you begin. An area support manager can archive the inspection (see Archiving an inspection started by mistake) and you can start again.

Related guides

- Planning an inspection
- Carrying out an inspection room by room
- Archiving an inspection started by mistake

INSPECTIONS

Inspections: carrying out an inspection room by room

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead Main inspector	**Inspections › In Progress › the inspection**	As long as the visit	Main inspector on the visit, or area support manager or lead

Purpose

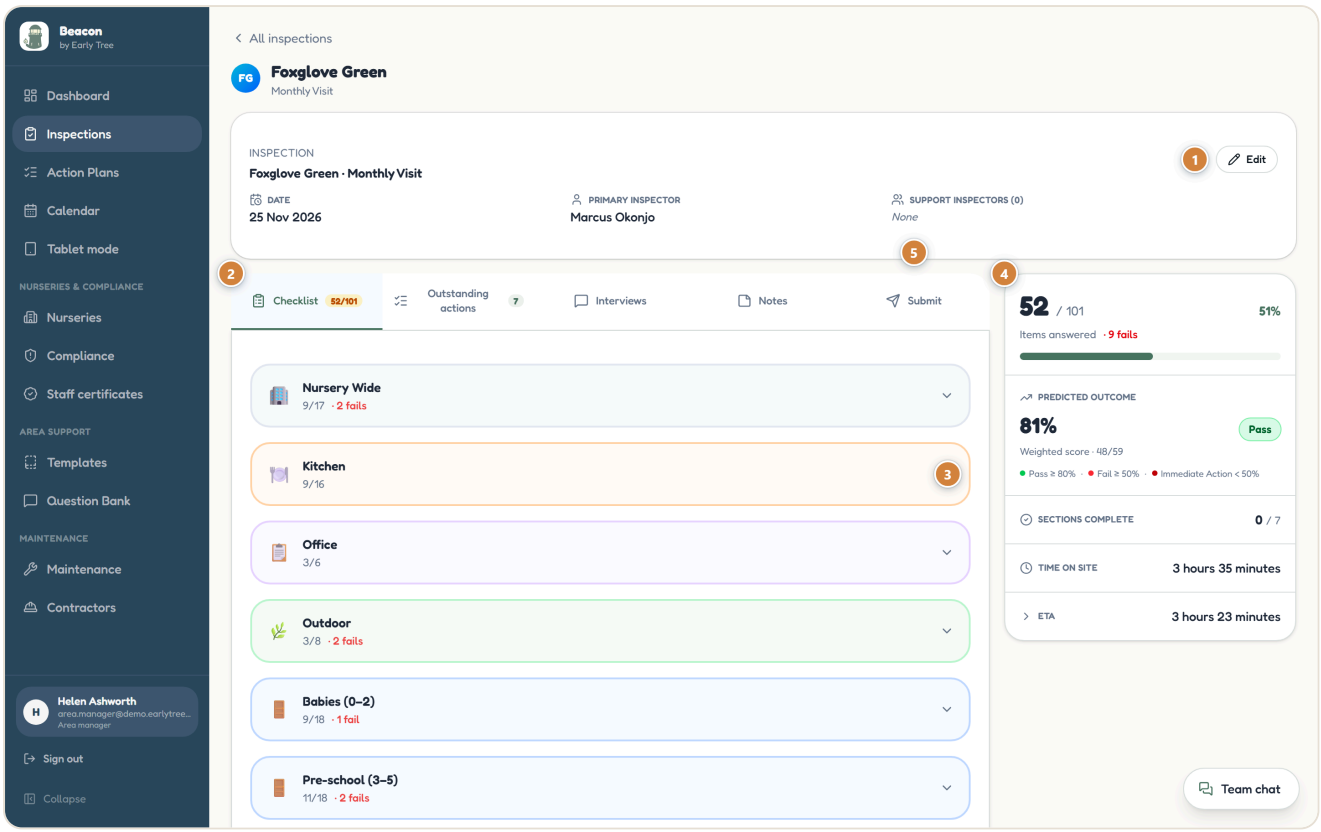
Record what you find in every room and area of the nursery, item by item, while you're there. Each answer is saved as soon as you make it, and failed items become actions in the nursery's action plan when the inspection is signed off.

Before you start

- The inspection has been started (see Starting an inspection).
- You're its main inspector, or an area support manager or lead.
- You have a tablet or laptop with you. Beacon works in the browser; see Getting started for using it on an iPad.

Find your way around the inspection

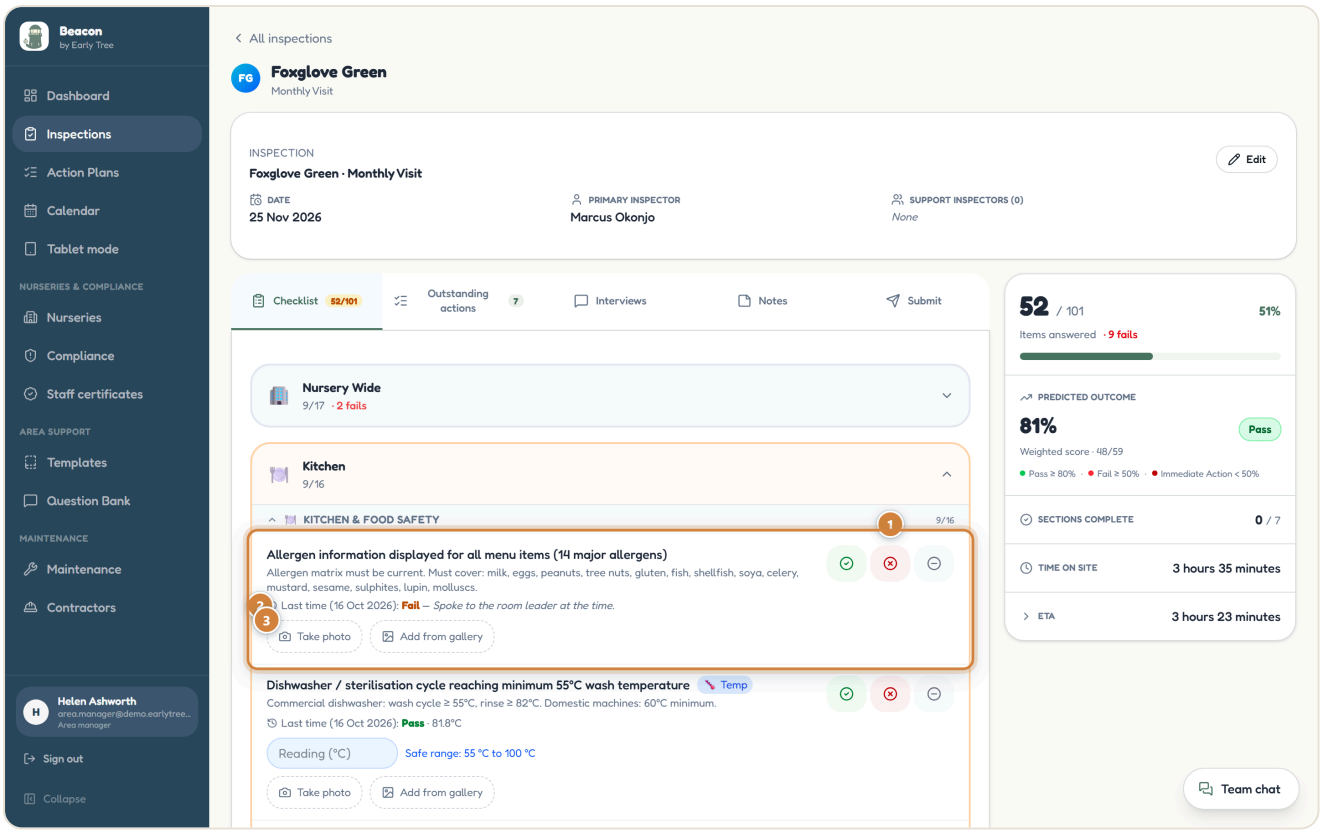
1. Open the inspection from the **In Progress** section of the Inspections page or the dashboard.
2. The card at the top shows the visit, its date and the team. Area support managers and leads can select **Edit** 1 to change them.
3. **Checklist** 2 is where you answer the items. Its badge shows how many you've answered.
4. Each area of the nursery has its own card 3: **Nursery Wide**, **Kitchen**, **Office**, **Outdoor** and each room. The card shows how many items you've answered and how many have failed.
5. The panel on the right 4 shows your progress, the **Predicted outcome** so far, how many areas you've finished, the time on site and an estimate of how long is left.
6. When you've finished, go to **Submit** 5.



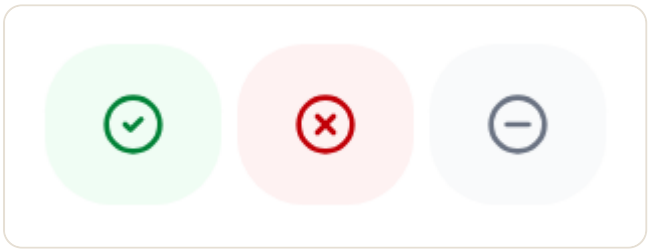
An inspection in progress.

Answer the items in an area

1. Select an area's card to open it. Its items are grouped into sections, such as **Kitchen & Food Safety**. Select a section to open it.
2. Read the item and its guidance. If the item was checked on the last visit, **Last time** 2 shows the date, the result and any note.
3. Choose the answer with the three buttons 1: the tick for **Pass**, the cross for **Fail**, or the dash for **N/A** (not applicable here). Your answer is saved straight away.
4. To add evidence, select **Take photo** 3 or **Add from gallery**. See Photos and temperature readings.



Answering items in the Kitchen.



Pass, Fail and N/A.

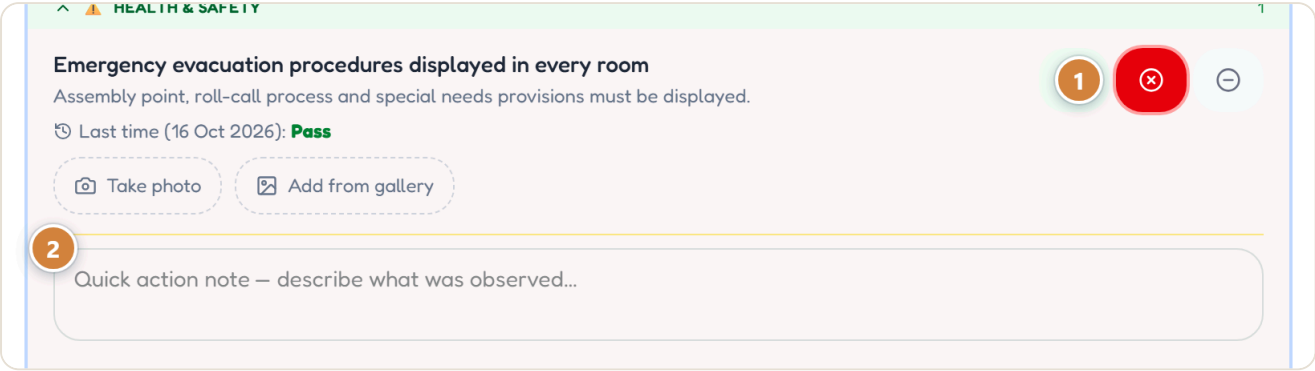
What you should see

> An item you pass or mark N/A moves straight into the area's **Completed** section, so only the items still to do are in front of you. The area card's count goes up, and the progress panel updates. A small **Saved** shows at the top of the checklist each time an answer is saved.

When an item fails

1. Select the cross 1 on the item.
2. A box opens under it: type what you saw in **Quick action note** 2, for example "Two plug sockets uncovered by the book corner". The note goes into the report and the action plan, so make it specific.

3 The item stays in view for 20 seconds (**Auto-hiding in 20s**) so you have time to write the note. The countdown pauses while you're typing. Select **Skip — no comment** to move it on without a note.



A failed item and its note, in the area's Completed section.

SAFEGUARDING CONCERNS

If you see something that worries you about a child's safety, follow your organisation's safeguarding procedure straight away. Don't wait for the report: a checklist note isn't a safeguarding referral.

Change an answer

Open the area's **Completed** section, then the section the item is in, and choose a different answer. You can change answers until the inspection is submitted. You can't set an item back to unanswered once it has an answer.

Outstanding actions from earlier visits

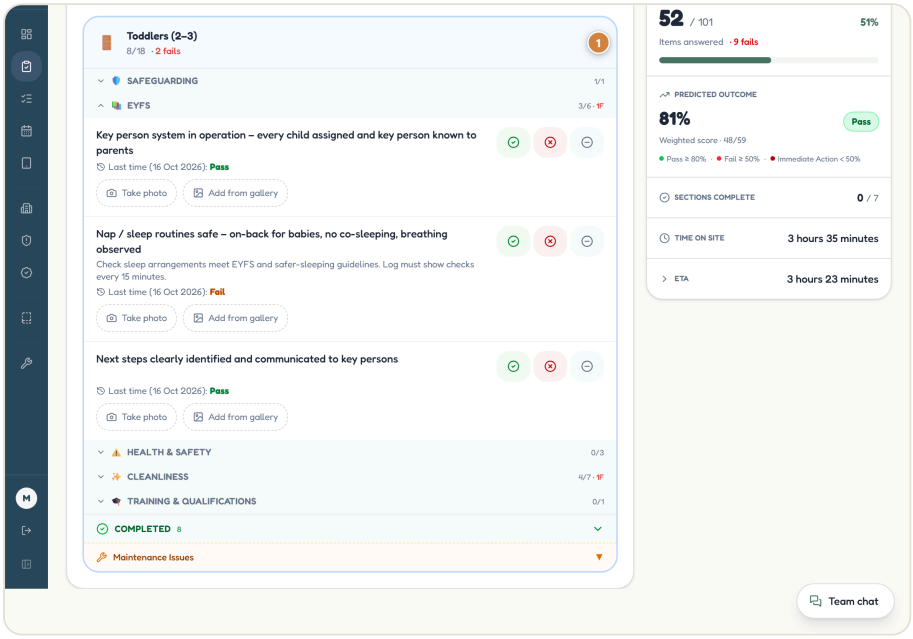
If the nursery still has open actions from earlier inspections, an **Outstanding actions** tab appears next to **Checklist**, grouped into overdue, blocked, in progress, not started and done but awaiting verification. On the checklist, an item with an open action shows it under the item; select it to open the action. Each area also lists **Open maintenance for this area**. Use them to check on site whether the work has been done.

Working with colleagues

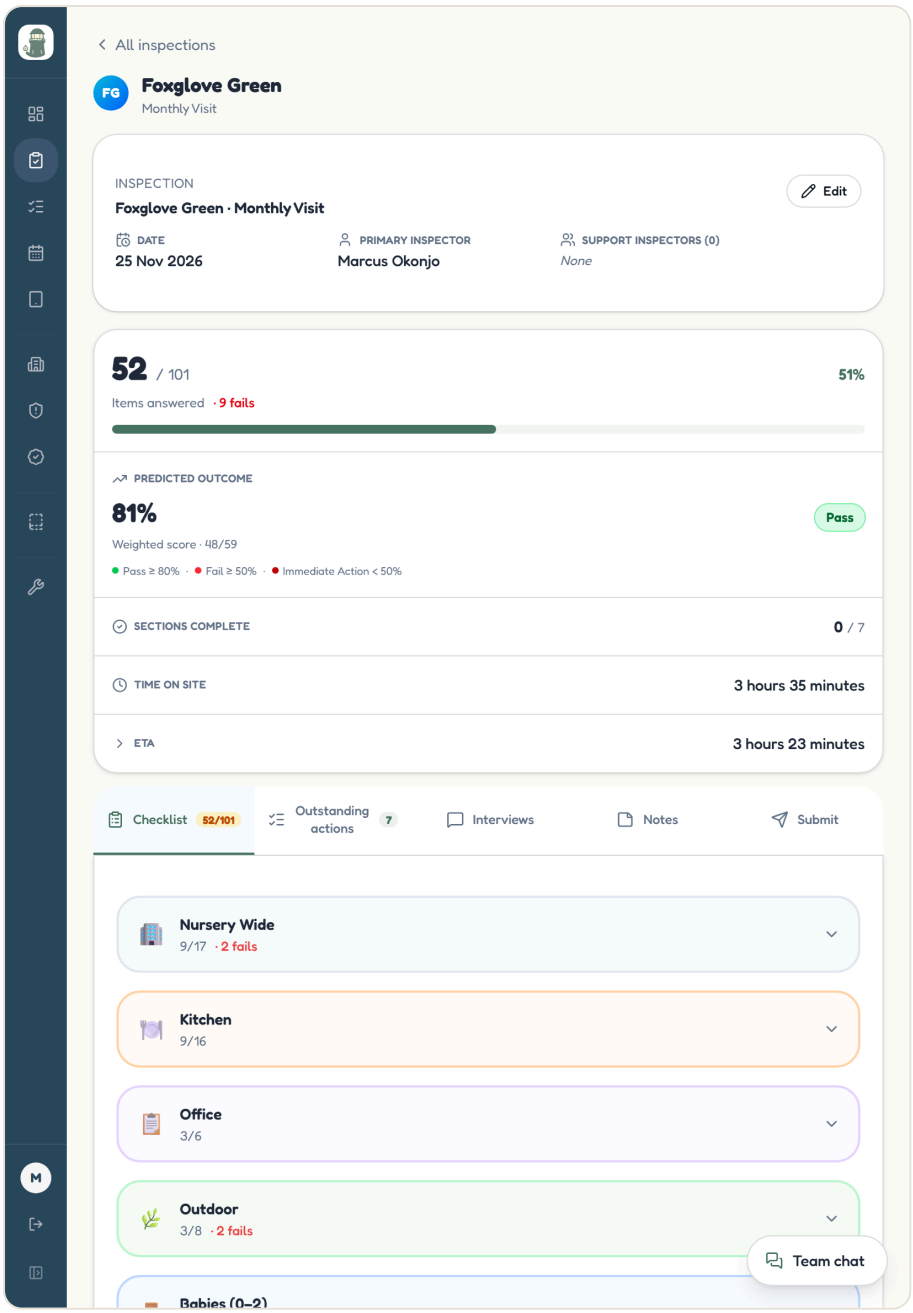
- Everyone on the inspection team sees each other's answers as they're made. When a colleague answers an item, Beacon shows a short message with their name, the item, their answer and the room.
- Select **Team chat** at the bottom of the screen to message the rest of the team about the visit.
- When more than one person has answered items, the progress panel shows how many each person has done.

On an iPad

The inspection works the same way on an iPad. Held landscape, the checklist and the progress panel sit side by side; held upright, the progress panel moves above the tabs. Open one area at a time 1 as you walk into each room, so only that room's items are on screen. For a full-screen, room-by-room way of inspecting on an iPad, with big buttons and photos that wait for a signal, use tablet mode: see Tablet mode.



Room by room on an iPad, held landscape.



The same inspection with the iPad held upright.

Common problems

An area I expected isn't on the checklist.

The nursery doesn't have that area set up, or it was inactive when the inspection started. Items are only created for the areas that existed then. See Nurseries.

"No items due for this visit type."

No checklist items match the visit type for the nursery's areas. Check the template with an area support manager.

The item disappeared before I finished my note.
It has moved to the area's **Completed** section. Open Completed, then its section, and carry on typing: the note is saved as you type.

I see "failed to save" at the top of the checklist.
Beacon couldn't save some answers and won't keep retrying them. Open each affected item and answer it again. See Working without a connection.

The checklist is greyed out and says Signed off.
The report has been signed off, so the checklist is a read-only record. Open the report to read it.

I get "page not found" when I open the inspection.
Only the main inspector, area support managers and area support leads can open an inspection that's in progress.

Related guides

- Photos and temperature readings
- Logging maintenance during an inspection
- Staff interviews
- Working without a connection
- Submitting an inspection

INSPECTIONS

Inspections: photos and temperature readings

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead Main inspector	**Inspections** › **the inspection** › **Checklist**	Seconds per photo or reading	Main inspector on the visit, or area support manager or lead

Purpose

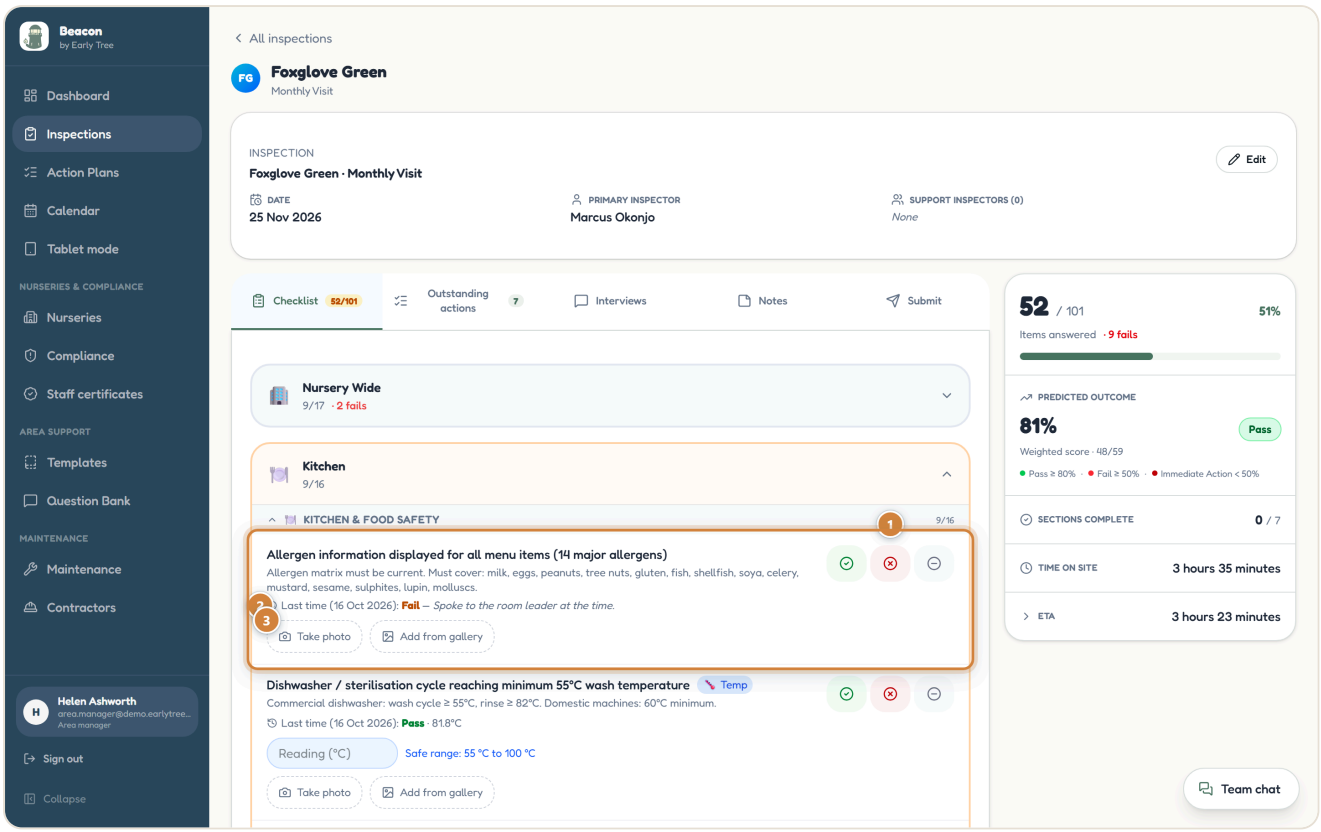
Back up what you found with evidence: a photo of a hazard, a video of a broken door closer, a fridge reading. Photos appear in the report and its PDF (failed items first), and help the nursery see exactly what needs fixing.

Before you start

- The inspection is in progress and you can answer its checklist (see Carrying out an inspection).
- To take photos in Beacon, allow the browser to use the camera when it asks.
- Don't photograph children's faces or anything that identifies a child. Follow your organisation's photo policy.

Add a photo or video

1. Open the area and section, and find the item.
2. Select **Take photo**. Where the browser allows it, the camera opens inside Beacon: point it, then select the round **Take photo** button. Select the arrows to switch between the front and back cameras, or the cross to close the camera without taking a photo.
3. To use a photo or video you already have, select **Add from gallery** and choose one or more files.



- Take photo and Add from gallery are under every item.

What you should see

> Beacon shows **Photo attached to** (or **Video attached to**) with the item's name and room, so you can check it went on the right item, and a small picture appears under the item. Photos are made smaller before they're sent, so they upload quickly on a weak connection.

View or remove a photo

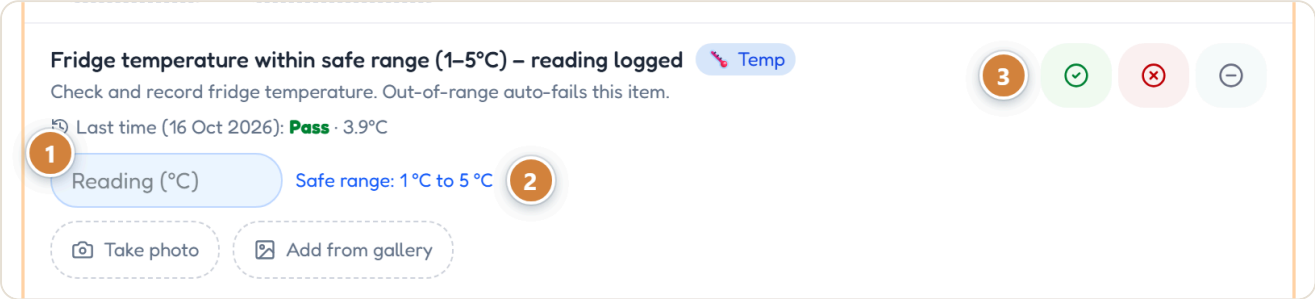
- Select a picture under the item to see it full size. Use the arrows to move between the item's photos and videos, and the cross to close.
- To remove one, select its cross and confirm with **Remove** in **Remove photo?**. It's removed from the inspection.

Record a temperature reading

Some items, such as fridge, freezer and hot food checks, are temperature readings. They show a 🌡️ **Temp** label, the safe range and a box for the reading.

1. Take the reading with your thermometer or probe.

2. Type it in the reading box 1, for example `4.2` for a fridge. Use a minus sign for freezers, such as `-19.5`.
3. Check it against **Safe range** 2, which shows the range for that item.
4. Press Enter or move on to the next field. Beacon answers the item for you from the reading 3: **Pass** if it's in the safe range, **Fail** (with **Temperature out of range — marked Fail**) if it isn't. If you've marked the item **N/A**, it stays N/A.



A fridge temperature reading.

Common problems

"Camera access was refused — opening the device camera instead."
The browser isn't allowed to use the camera, so Beacon opens the device's own camera instead. To use the camera in Beacon, allow camera access for your Beacon address in the browser's settings.

"Failed to upload media".
The photo didn't reach Beacon, usually because the connection dropped. Photos aren't saved for later when you're offline, so try again when you have a signal. See Working without a connection.

A thumbnail shows a grey camera instead of the photo.
The picture couldn't be loaded. Refresh the page; if it stays grey, add the photo again.

Related guides

- Carrying out an inspection room by room
- Logging maintenance during an inspection
- Working without a connection

INSPECTIONS

Inspections: logging maintenance during an inspection

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead Main inspector	**Inspections** › **the inspection** › **an area** › **Maintenance Issues**	A minute per issue	Main inspector on the visit, or area support manager or lead

Purpose

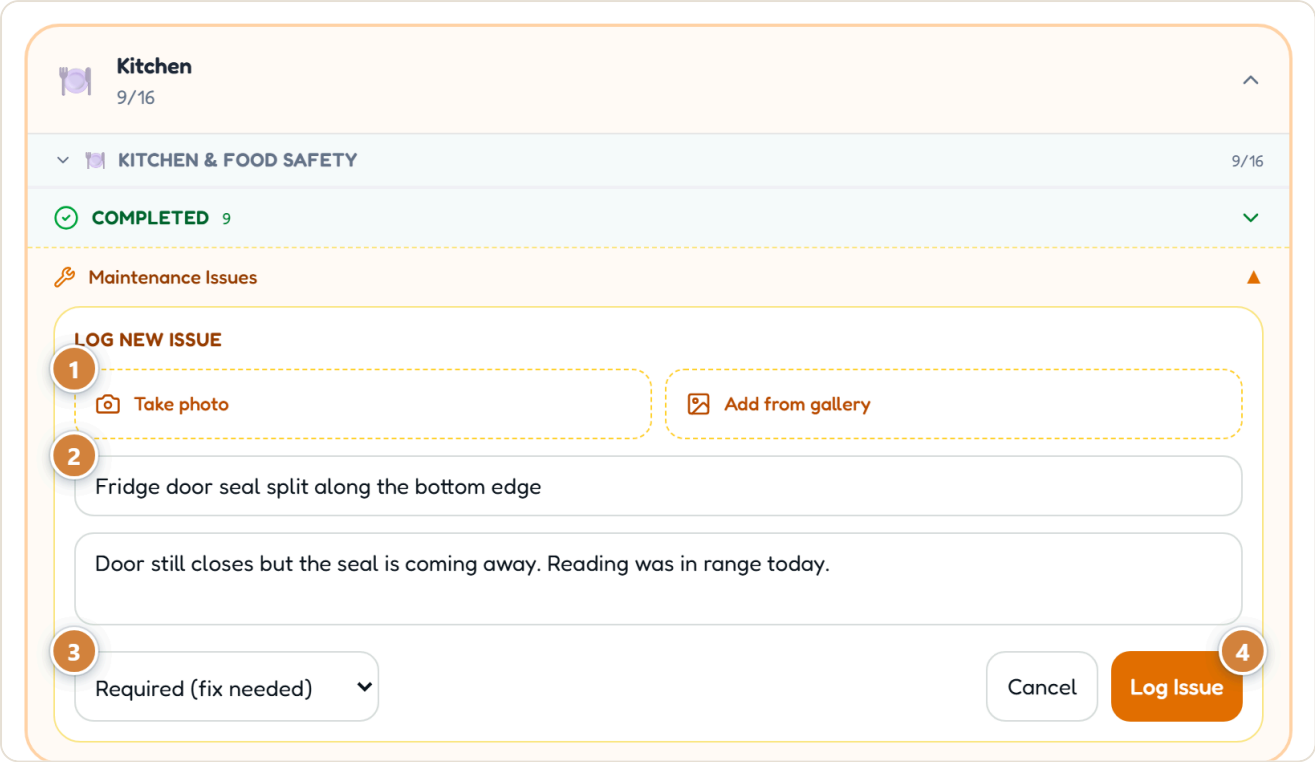
Record repairs and building problems you spot on the visit (a broken gate latch, a damp patch, a split fridge seal) so they reach the maintenance team. Maintenance issues are separate from the checklist: you can log one in any area, whether or not an item failed.

Before you start

- The inspection is in progress and you can answer its checklist.
- If something is dangerous right now, deal with it on site first and tell the nursery manager. Logging it in Beacon doesn't alert anyone straight away.

Log an issue

1. Open the area where the problem is, such as **Kitchen** or a room.
2. At the bottom of the area, select **Maintenance Issues**, then **Log a maintenance issue in** followed by the area's name.
3. To add a photo, select **Take photo** or **Add from gallery** 1.
4. Describe the problem in **Describe the issue** 2, for example "Broken gate latch on outdoor fence". This becomes the job's title. Add anything else in **Additional details (optional)**.
5. Choose how serious it is 3:
   - **Advisory (preventative)**: not broken yet, but worth doing.
   - **Required (fix needed)**: needs fixing.
   - **Urgent (safety concern)**: a risk to safety.
6. Select **Log Issue** 4.



Logging a maintenance issue in the Kitchen.

What you should see

> Beacon shows **Maintenance issue logged**, and the issue is listed under **Maintenance Issues** for that area with its severity. Use the pencil to change it or the bin to delete it until the inspection is submitted.

What happens when the inspection is submitted

Each issue you logged becomes:

- a **maintenance job** in the **Triage** column of the maintenance board, linked back to this inspection. Its priority comes from the severity: Urgent becomes **Critical**, Required becomes **High**, and Advisory becomes **Medium**;
- an **action** in the inspection's action plan, with a target date 4 working days ahead for Urgent (the shortest Beacon sets), 7 for Required and 14 for Advisory. Bank holidays aren't counted.

Reviewers can correct an issue's details on the review page before sign-off. See About review and sign-off and Maintenance.

Issues carried over from earlier visits

Under **Maintenance Issues**, **Carry-overs from previous inspections** lists issues from earlier visits to this area that are still open, so you can check them while you're there. **Open maintenance for this area** lists the area's open maintenance jobs, with their priority and status.

Common problems

"Restored your unsaved maintenance note — please re-take the photo if you'd added one."
The page reloaded (for example, the tablet closed the browser while the camera was open) before you selected **Log Issue**. Beacon kept what you'd typed. Take the photo again, then select Log Issue.

"Photo upload failed … the note will save without the new photo".
The issue was saved but the photo wasn't. Edit the issue with the pencil and add the photo again when you have a signal.

"Failed to save".
Maintenance issues need a connection: they aren't saved for later when you're offline. Write the issue down and log it when you're back online.

Related guides

- Carrying out an inspection room by room
- Submitting an inspection
- Maintenance

INSPECTIONS

Inspections: staff interviews

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead Main inspector	**Inspections** › **the inspection** › **Interviews**	A few minutes per question	Main inspector on the visit, or area support manager or lead

Purpose

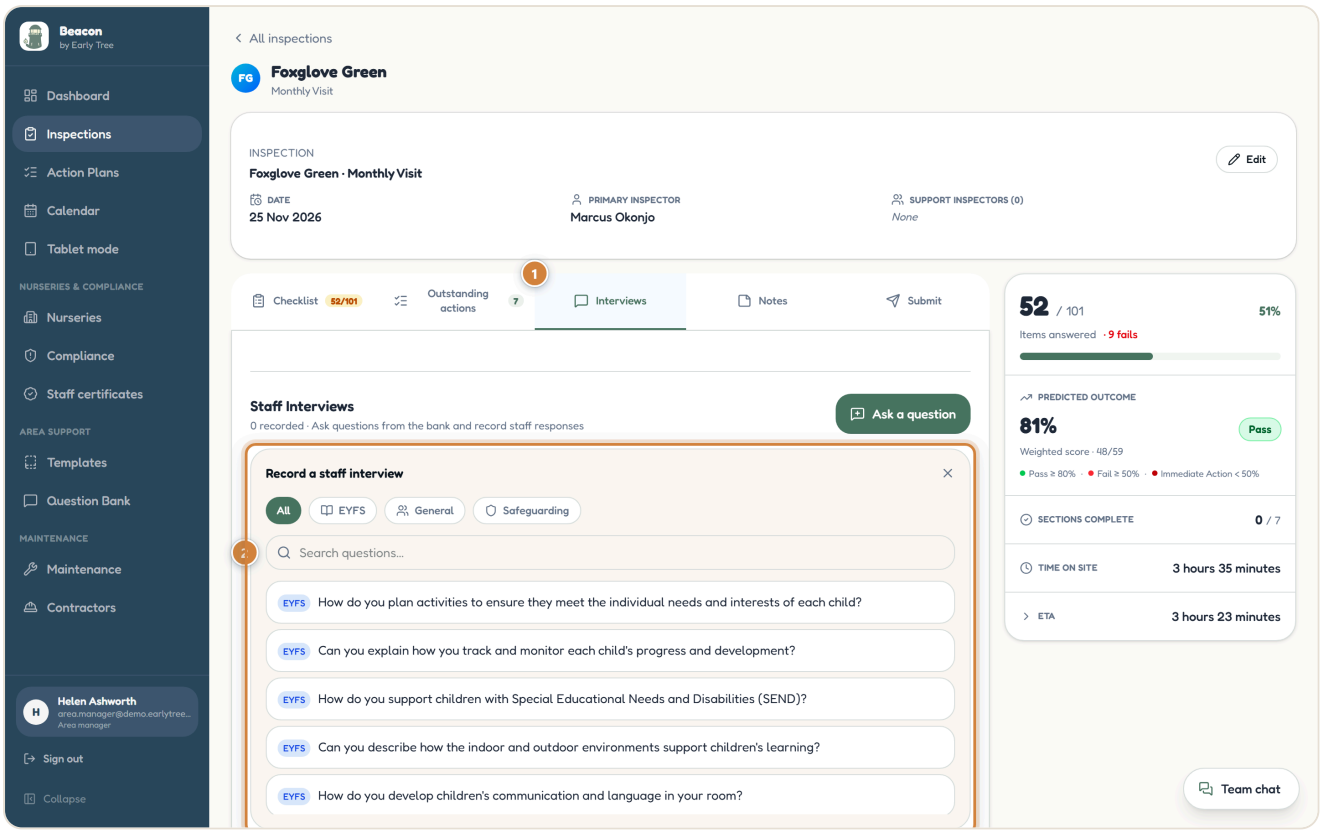
Check that staff know what they need to, for example how to report a safeguarding concern or what to do in a fire, by asking questions from your organisation's question bank and recording their answers. Weak answers become actions in the nursery's action plan.

Before you start

- The inspection is in progress.
- Your area support team has set up the question bank (see Templates).
- Tell the member of staff why you're asking and that their answer is recorded. Record only what you need: their name and what they said.

Choose a question

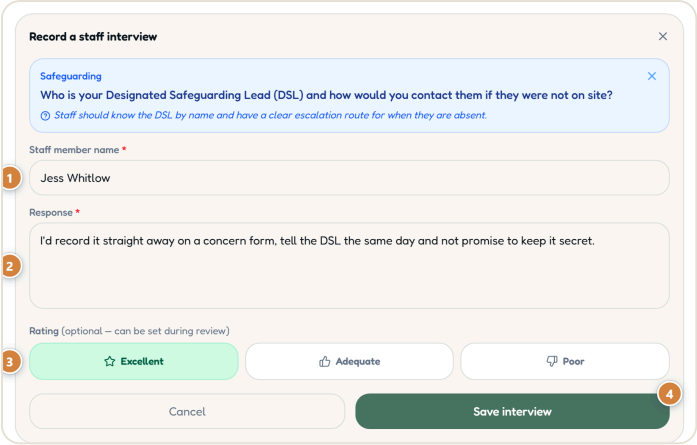
1. On the inspection, select **Interviews** 1.
2. Select **Ask a question**.
3. Find the question: choose a category at the top, or search with **Search questions...** 2.
4. Select the question. Any guidance for the interviewer is shown with it.



Choosing a question from the question bank.

Record the answer

1. Type the member of staff's name in **Staff member name** 1. Names you've already used on this visit are suggested as you type.
2. Type what they said in **Response** 2.
3. If you're ready to judge the answer, choose **Excellent**, **Adequate** or **Poor** 3. You can leave it unrated and rate it during the review.
4. Select **Save interview** 4.



Recording a member of staff's answer.

What you should see

> Beacon shows **Interview recorded**, and the answer is listed under the member of staff's name, with its rating or **Not yet rated**. To ask the same person another question, select **Ask another question** under their name, so you don't retype it. The **Interviews** tab shows how many interviews you've recorded.

Ratings and the action plan

- **Excellent**: no action needed.
- **Adequate** or **Poor**: an action is added to the nursery's action plan when the inspection is submitted (or straight away, if it already has been). During review, the reviewer adds feedback explaining what was missing, which goes into the action.

To change a rating, open the interview and choose another under **Rate this response**. To delete one, select **Remove**.

Common problems

"Please select a question, enter a staff name, and type the answer."
All three are needed. The rating is optional.

The question I want isn't in the bank.
Ask an area support manager to add it to the question bank. See Templates.

"Failed to save interview".
Interviews need a connection. Copy the answer somewhere safe and save it again when you have a signal.

Related guides

- Carrying out an inspection room by room
- Submitting an inspection
- About review and sign-off

INSPECTIONS

Inspections: inspection notes

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead Main inspector	**Inspections** › **the inspection** › **Notes**	Seconds	Main inspector on the visit, or area support manager or lead

Purpose

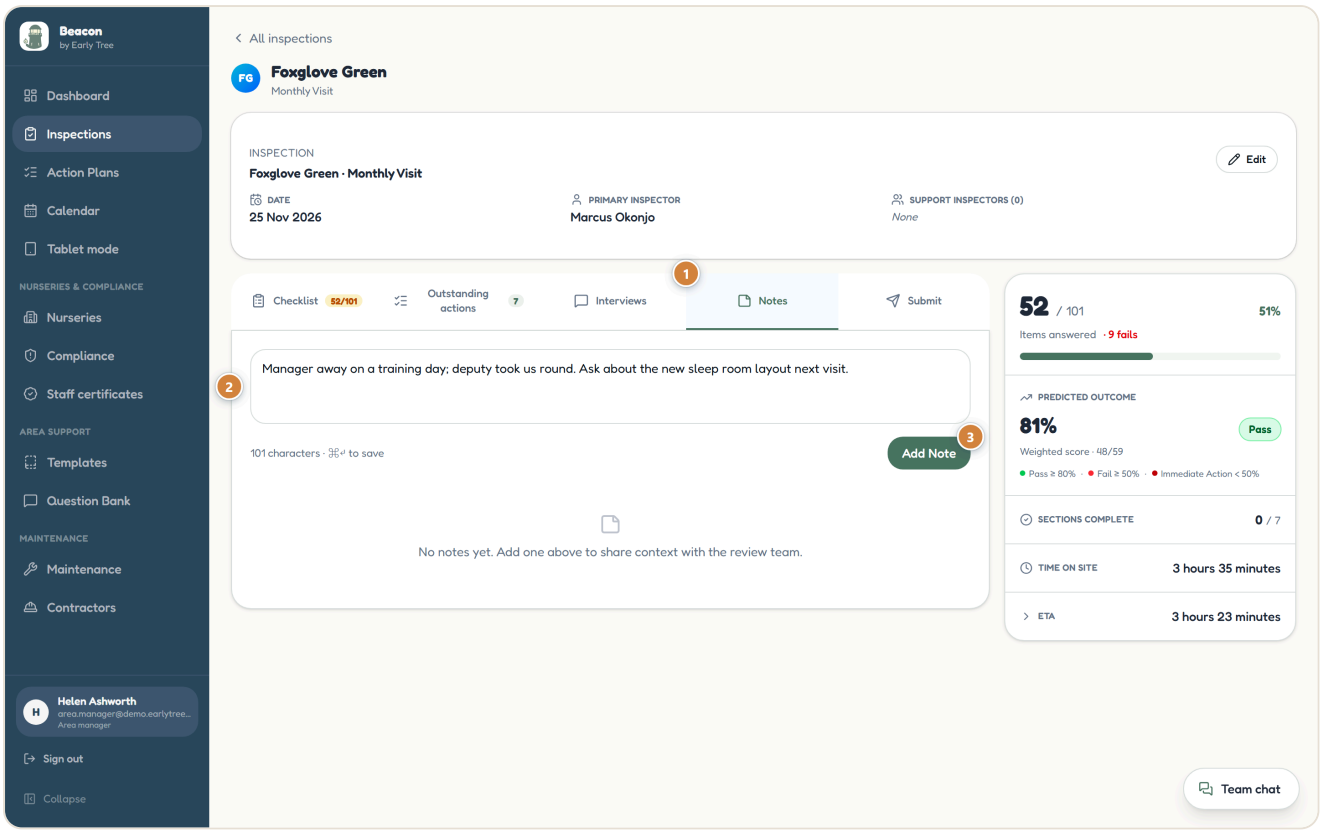
Jot down things that don't belong to a checklist item but the review team should know: who showed you round, something to follow up next time, context for a judgement. Notes are for the inspection team only; they don't go into the nursery's report.

Before you start

- The inspection is in progress.
- Don't put personal details about children or staff in a note unless the review needs them.

Add a note

1. On the inspection, select **Notes** 1.
2. Type the note in the box 2.
3. Select **Add Note** 3. On a keyboard, Ctrl and Enter (⌘ and Enter on a Mac) does the same.



Adding a note during a visit.

What you should see

> The note appears in the list below with your name and the time, newest first, and the **Notes** tab shows how many notes there are. Use the pencil on your note to change it, or the bin to delete it.

Notes at review

After the inspection is submitted, notes can't be added or changed. Reviewers read them with the **Notes** button on the review page, and can turn a note into an action plan item or a maintenance job with **Add to Action Plan** or **Add to Maintenance**. See About review and sign-off.

Common problems

"Failed to save note".
Notes need a connection. Copy the text and add it again when you have a signal.

I can't see the Notes tab.
Only the main inspector, area support managers and area support leads see an inspection's notes.

Related guides

- Carrying out an inspection room by room
- Staff interviews
- Submitting an inspection

INSPECTIONS

Inspections: working without a connection

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead Main inspector	**Inspections › the inspection › Checklist**	No extra time	Main inspector on the visit, or area support manager or lead

Purpose

Keep answering the checklist in rooms with a weak or no signal, and make sure every answer reaches Beacon once you're back online.

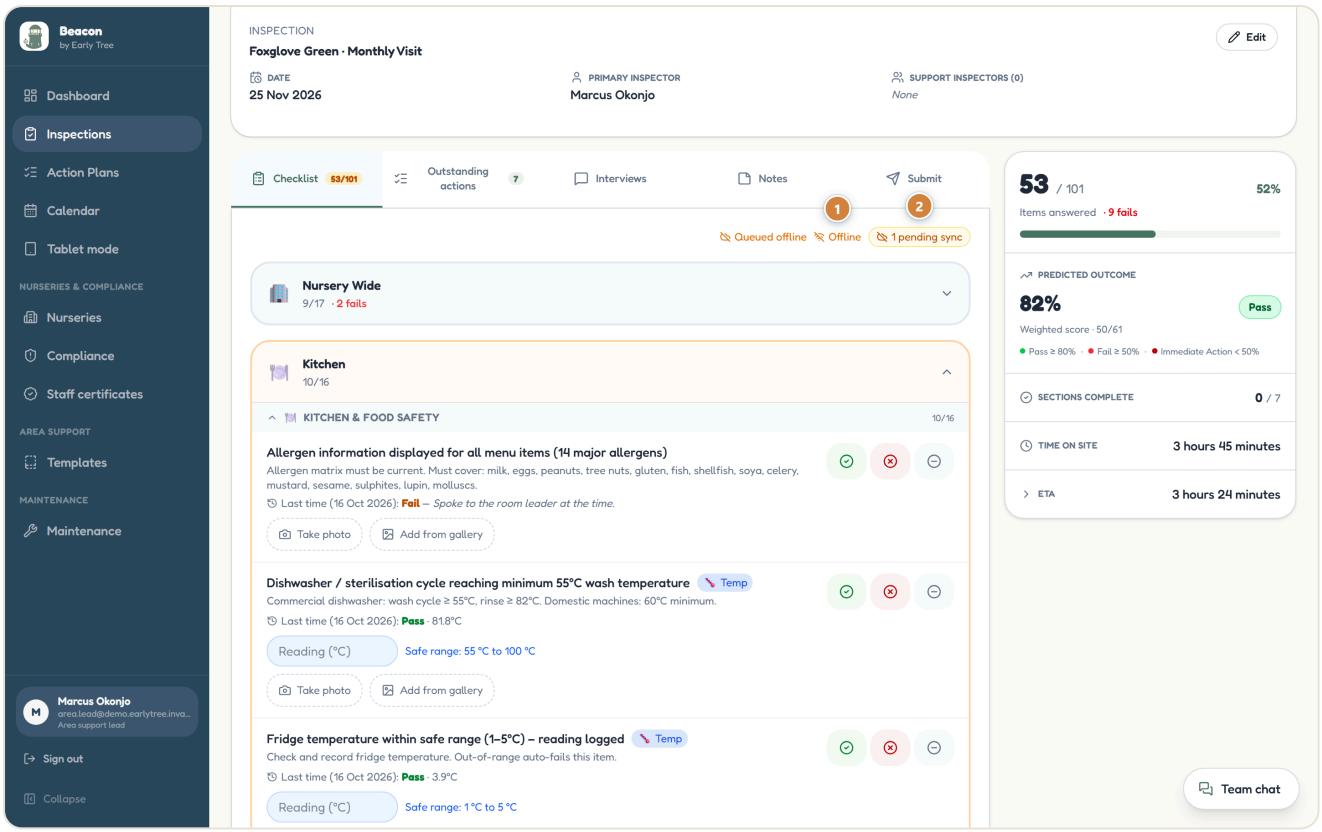
Before you start

- **Open the inspection while you still have a connection**, and keep the page open. Beacon can't open a page from scratch without a connection.
- Know what does and doesn't work offline:

Works offline (kept on the device and sent later)	Needs a connection
Pass, Fail and N/A answers	Maintenance issues
Quick action notes on failed items	Staff interviews
Temperature readings	Inspection notes
Photos and videos	Submitting the inspection

Answer items without a connection

1. Carry on answering as normal. When the connection drops, **Offline** (1) shows at the top of the checklist.
2. Each answer is kept on the device. **Queued offline** shows instead of **Saved**, and a count such as **1 pending sync** (2) shows how many answers and photos are waiting.
3. Photos you take are kept on the device too, and attached to their item once they've uploaded.
4. When the connection comes back, Beacon sends everything waiting by itself. It also tries again every 15 seconds while the page is open.



Answers waiting to be sent while there's no connection.

What you should see

> Once you're back online, **Offline** goes, the **pending sync** count drops to nothing, and **Saved** shows. Every answer is now in Beacon, and colleagues on the visit can see them.

Tablet mode works the same way on an iPad.

Before you submit

When you select **Submit Inspection**, Beacon first sends anything still waiting on the device. If something is still waiting (you're offline, or it hasn't uploaded yet) or the server refused it, Beacon doesn't submit and tells you why. Get a connection, or fix the items marked as failed, then submit again.

Common problems

A red "failed to save" count shows.

Beacon sent those answers but it refused them (for example, the inspection had already been submitted, or you no longer have access), so it won't try again by itself. Open each item and answer it again; if it still fails, ask your area support manager.

The page went blank or "You're offline" when I opened the inspection.

The page has to be opened with a connection. Find a signal, open the inspection, then carry on.

"N changes are still uploading from this device".
Submit waited for them but they haven't gone yet. Keep the page open with a connection until the pending count goes, then submit.

I closed the browser before my answers were sent.
They're kept on that device. Open the same inspection on the same device and browser when you have a connection, and Beacon sends them.

Related guides

- Carrying out an inspection room by room
- Photos and temperature readings
- Submitting an inspection

INSPECTIONS

Inspections: submitting an inspection

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead Main inspector	**Inspections** › **the inspection** › **Submit**	A minute	Main inspector on the visit, or area support manager or lead

Purpose

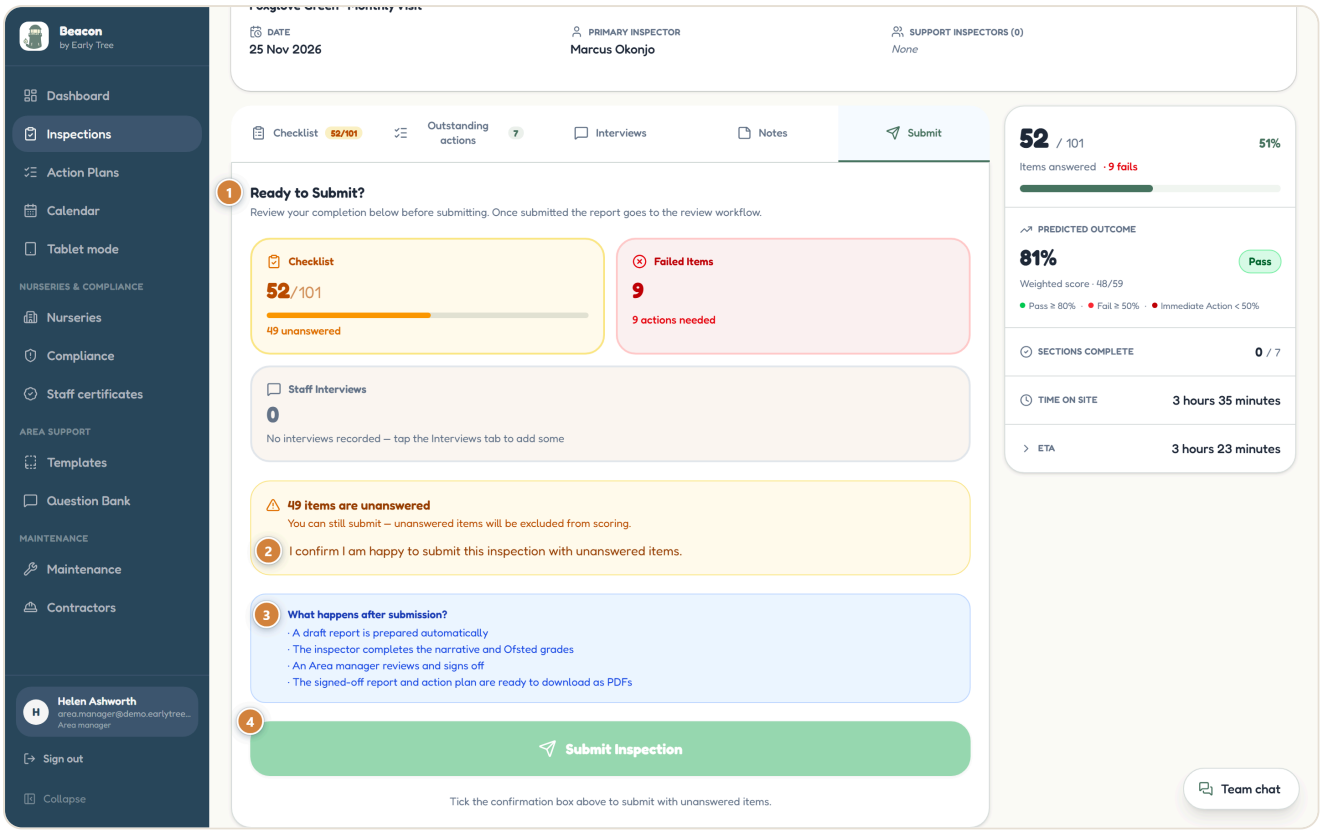
Close the visit and hand it over for review. Submitting freezes the checklist, works out the score and creates a draft report, a draft action plan and maintenance jobs, ready for the review team.

Before you start

- You've answered every item you can, and added photos, notes, maintenance issues and staff interviews.
- You have a connection. Submit first sends any answers and photos still waiting on the device, and won't go ahead until they've reached Beacon (see Working without a connection).
- Once you submit, the checklist can't be changed. Check it first.

Submit the inspection

1. On the inspection, select **Submit**. A green dot on the tab means every item has an answer.
2. Check the summary under **Ready to Submit?** 1: **Checklist** (items answered, and how many are unanswered), **Failed Items** and the staff interviews you recorded.
3. If any items are unanswered, Beacon says so. You can still submit: unanswered items are left out of the score and listed as not assessed in the report. Tick **I confirm I am happy to submit this inspection with unanswered items** 2.
4. Read **What happens after submission?** 3.
5. Select **Submit Inspection** 4.



The Submit tab, with some items still unanswered.

What you should see

Beacon opens the inspection's review page. On the Inspections page it moves from **In Progress** to **In Review** with **Review Required**. Beacon has also created:

- a draft report with the score and result (Pass, Fail or Immediate Action) and a first draft of the narrative;
- a draft action plan, with an action for each failed item, each maintenance issue and each staff answer rated Adequate or Poor, and links to actions still open from earlier visits;
- a maintenance job in **Triage** for each maintenance issue you logged.

If your organisation uses Nina, Beacon may show a loading screen for a moment while she drafts a fuller narrative and suggests grades. See Nina.

The draft is only seen by area support managers and leads until it's signed off. See About review and sign-off.

Common problems

Submit Inspection is greyed out.

Some items are unanswered and the confirmation box isn't ticked, or the inspection has already been submitted.

"You're offline" or "still uploading from this device".
Some of your work is only on this device. Get a connection and wait for the pending count to go, then submit again.

"You're a support inspector on this visit".
The main inspector or area support submits the visit. Let them know you've finished.

I submitted too early.
The checklist can't be reopened. Tell the reviewer: they can add actions, notes and corrections on the review page, or an area support manager can delete the report and you can start a new inspection.

Related guides

- Working without a connection
- About review and sign-off
- Action plans

INSPECTIONS

Inspections: archiving an inspection started by mistake

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager	**Inspections** › **In Progress**	A minute	Area support manager

Purpose

Tidy up an inspection that was started by mistake (the wrong nursery or visit type, or a duplicate) or abandoned part way through, so it doesn't sit in **In Progress** or count on the dashboard. Archiving hides the inspection; it doesn't destroy what was recorded.

Before you start

- You're an area support manager.
- The inspection is still **In Progress**. A submitted inspection is archived by deleting its report instead (see Review and sign-off).
- Make sure nobody is still working on it.

Archive an inspection

1. In the menu, select **Inspections**.
2. In **In Progress**, find the inspection and select its archive button (**Archive inspection**). The dashboard has the same button.
3. Read **Archive this inspection?** and select **Archive**.

What you should see

> Beacon shows **Archived inspection at** and the nursery's name. The inspection leaves the **In Progress** section and the dashboard. Its answers, photos and maintenance notes are kept.

Find archived inspections

On the Inspections page, select **Archive** next to the filters. **Archived Inspections** lists everything archived, newest first, with the date it was archived. Select **Exit Archive** to go back.

Inspections whose report was deleted have a **Restore** button here. Restoring brings back the report and the inspection.

Common problems

There's no archive button.
Only area support managers can archive, and only inspections still in progress.

I can't restore an inspection I archived while it was in progress.
In this version, **Restore** only appears for inspections that had a report. An inspection archived while it was still in progress can't be brought back from the archive. Start a new inspection instead, or ask Early Tree support.

"Only Draft or In-progress inspections can be archived from this endpoint."
The inspection has been submitted. An area support manager deletes its report instead.

Related guides

- The inspections list
- Starting an inspection
- About review and sign-off