Telford & Wrekin
COUNCIL

LAS Training – Basics

LAS Training - Basics

Course Aims

The purpose of this training is to enable staff to access LAS (Protocol) and be able to perform basic tasks.

Objectives

Upon completion of the training, the delegate will, with the aid of any course handouts, desk aids or manuals, be able to...

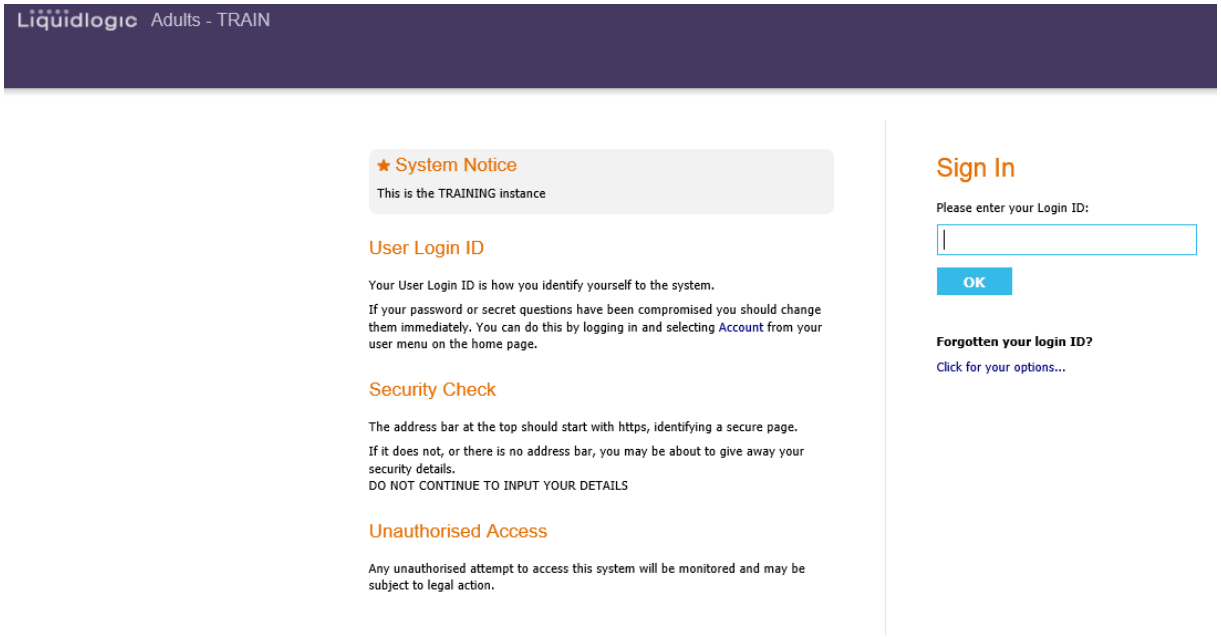
- Access the system in accordance with organisational security requirements
- Navigate the initial screens found on the system
- Search for and retrieve a record
- Create a record
- Navigate through a client's record including how to:
    - Record Aliases
    - Record a DOD
    - Change/add an address:
    - Record Consent to Information Sharing
    - Add a Special Factor
    - Add a Personal Relationship to a clients record
    - Add a Professional Involvement to a clients record
    - Generate Letters (CareLetters) and Printed Assessments/Support Plans
    - Record Hospital Admission/Discharge
    - Add an Allergy
    - Add a case note

Logging On

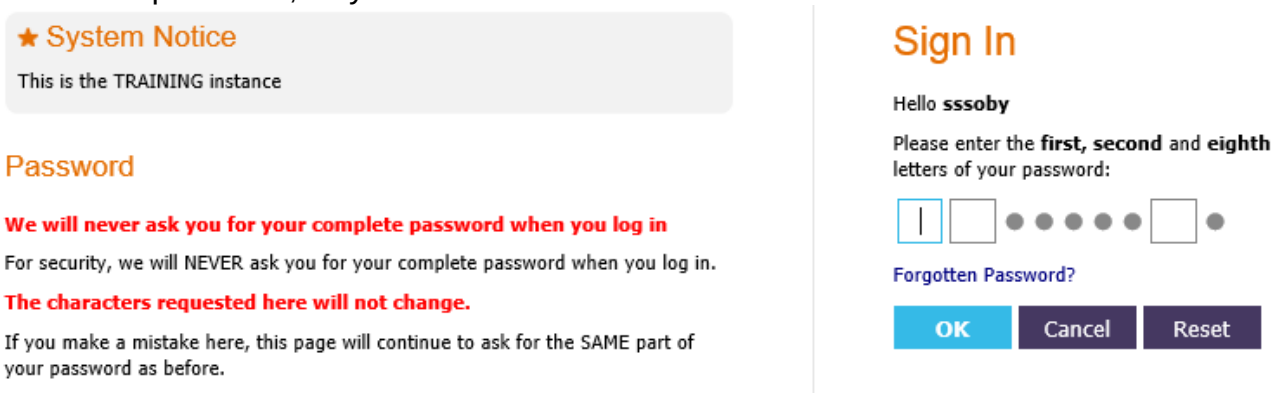
<u>Today we are going to be logging in to our training system, but in the workplace you will be logging in to the live system.</u>

Depending how your network account is set up, you will either have a folder or gold star called “My Applications” on your desktop; your link to LAS (Protocol) system will be in there.

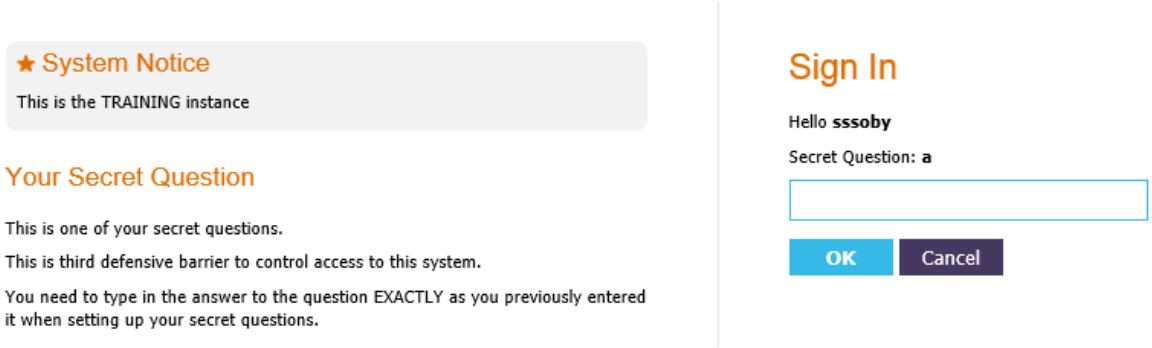
There is a three step process to get in to the system.
First of all, the system wants to know your Login ID.



Next up, the system asks you for your password. However, it will never ask you for your whole password; only certain characters of it.

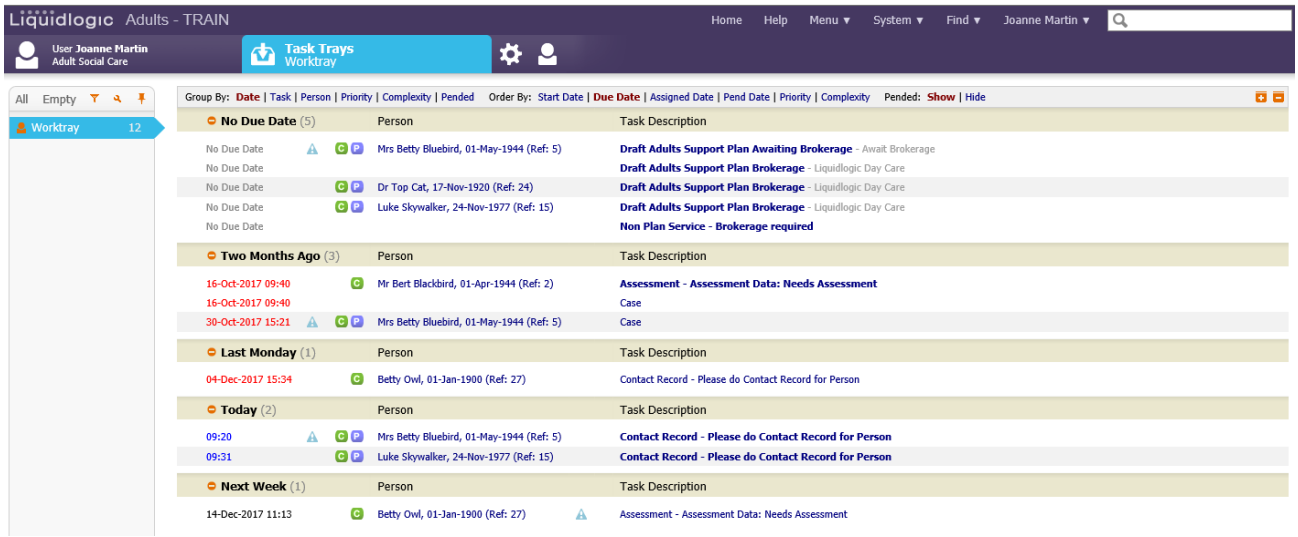


Finally, if you have counted correctly the system will then ask you for the answer to one of your secret questions.



Worktray

Having passed the security checks your screen will look something like this (it may not look exactly the same as this page)...This is your 'Worktray'



Everybody that has an account on LAS has their own worktray. Depending on your role, or what team you are in, will depend on what type of tasks and alerts appear in your worktray.

Organising your Worktray

Worktrays can be organised in different ways using the options at the top:

Note: When sorting your worktray by Person your clients will be listed in alphabetic order (by surname) with all of their outstanding tasks beneath their name. Your clients will only appear in your tray if they have an outstanding task. To see all clients, including those without outstanding tasks, click on 'Full Caseload'

Note: Due dates are colour coded as follows: Black means the task is due in the future; Red means the task is overdue; Blue means the task is due today; Green means the task is due tomorrow

Group Trays

In the live system, you may also have access to a "group tray". Group trays are worktrays where multiple users can have access and pick up tasks from them. For example, in the live system there will be a "review" tray for each locality where all future reviews will sit, and a manager will allocate these out to individual workers trays.

Note: A group tray will only be visible if there are any tasks in it.

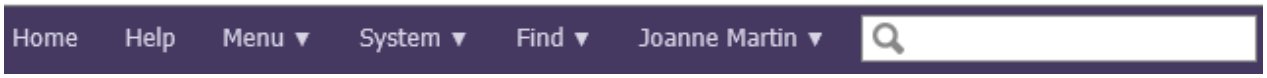
Other Useful Information re Worktrays:

- To get back to your worktray when in other parts of the system, click on 'Home' at the top of the screen

- If a task is in **bold**, this means that you haven't been in to it yet. If a task is not in bold, this means that you have already been in to it. (A bit like emails in your inbox!)
- If you click on the clients name from your worktray this will take you in to the clients record, however, if you click on the task from your worktray this will take you directly in to the task

Links

Now let's explore the links displayed at the top of the page; working from left to right (Home to Search Box)



Home
This takes you to your "worktray".

Help
This opens up a separate window. At the moment there is nothing in it, however, this will be populated at a later date with useful links and guides.

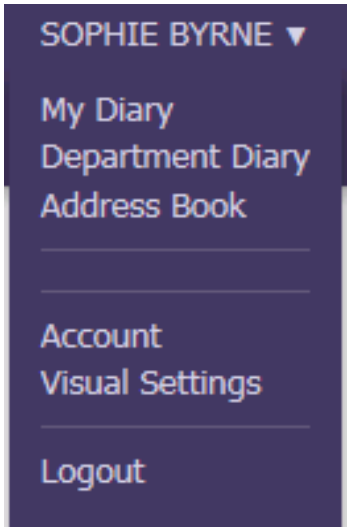
Menu
This gives menu options according to the privileges you have been assigned by ICT; usually used by ICT and Management to pull basic reports.

System
Tells you which version of LAS you are using.

Find
This allows us to search for a person.

Note: If you have a particular access right you may also be able to search for 'Organisational Safeguarding'

Your Name



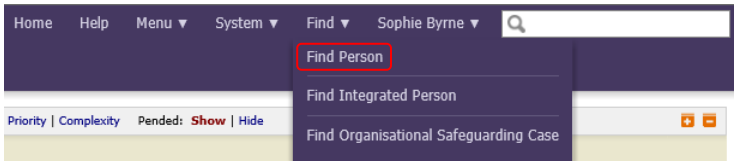
Diaries - we will not be using these either today or in the real world; we will continue to use our Outlook diaries
Address Book – you will come across the Address Book a lot when using the system
Account – has information about you on! This is where you will go to change your password and security questions
Visual settings – This allows you to customise the display to your personal preferences such as colour scheme and font size.

Logout allows us to exit the system properly

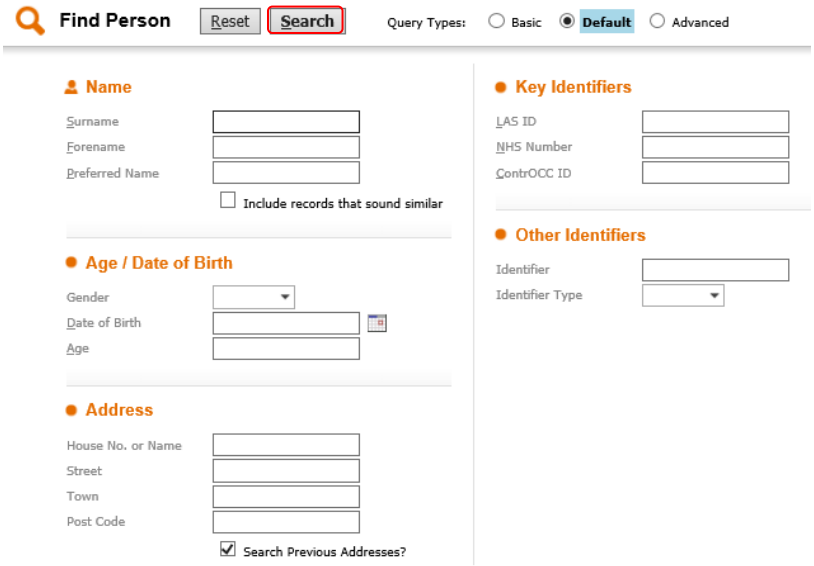
White Search Box
This provides a list of records that you have already viewed during this session of being logged in to LAS; you can quickly access records already viewed today. Once you log out of LAS the list disappears and starts again next time you log in.

How to Search for a Record

Hover over ‘Find’ and click on ‘Find Person’

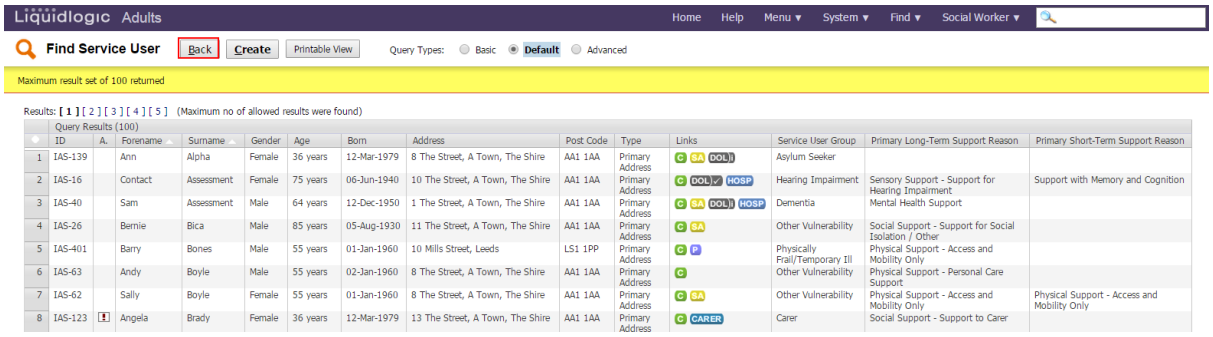


Enter your search criteria and click on ‘Search’
Note: Wildcards can be used (%)
Note: When entering a year in to LAS (e.g. DOB) the year always has to be in a 4 digit format e.g. 01/01/1950 <u>not</u> 01/01/50



If no results were returned click on ‘Back’. You can then either amend your search manually or click on ‘Reset’ to start a fresh new search

Once a list of results appear, click on the required entry to view the persons record



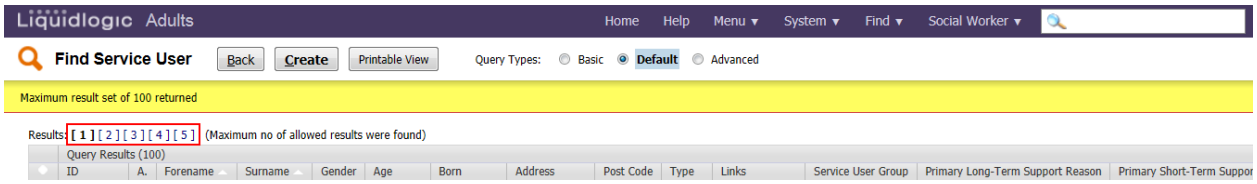
	ID	A.	Forename	Surname	Gender	Age	Born	Address	Post Code	Type	Links	Service User Group	Primary Long-Term Support Reason	Primary Short-Term Support Reason
1	IAS-139		Ann	Alpha	Female	36 years	12-Mar-1979	8 The Street, A Town, The Shire	AA1 1AA	Primary Address	C SA DOL	Asylum Seeker		
2	IAS-16		Contact	Assessment	Female	75 years	06-Jun-1940	10 The Street, A Town, The Shire	AA1 1AA	Primary Address	C DOL HOSP	Hearing Impairment	Sensory Support - Support for Hearing Impairment	Support with Memory and Cognition
3	IAS-40		Sam	Assessment	Male	64 years	12-Dec-1950	1 The Street, A Town, The Shire	AA1 1AA	Primary Address	C SA DOL HOSP	Dementia	Mental Health Support	
4	IAS-26		Bernie	Bica	Male	85 years	05-Aug-1930	11 The Street, A Town, The Shire	AA1 1AA	Primary Address	C SA	Other Vulnerability	Social Support - Support for Social Isolation / Other	
5	IAS-401		Barry	Bones	Male	55 years	01-Jan-1960	10 Mills Street, Leeds	LS1 1PP	Primary Address	C P	Physically Frail/Temporary Ill	Physical Support - Access and Mobility Only	
6	IAS-63		Andy	Boyle	Male	55 years	02-Jan-1960	8 The Street, A Town, The Shire	AA1 1AA	Primary Address	C	Other Vulnerability	Physical Support - Personal Care Support	
7	IAS-62		Sally	Boyle	Female	55 years	01-Jan-1960	8 The Street, A Town, The Shire	AA1 1AA	Primary Address	C SA	Other Vulnerability	Physical Support - Access and Mobility Only	Physical Support - Access and Mobility Only
8	IAS-123	!	Angela	Brady	Female	36 years	12-Mar-1979	13 The Street, A Town, The Shire	AA1 1AA	Primary Address	C CARER	Carer	Social Support - Support to Carer	

Note: The “Links” column in the Service User Search Results screen, will display any relevant toolbar icons for the person alongside the results line.
These icons include:

- the C icon to demonstrate there is an active **Case**
- the P icon to highlight an active **Plan**
- the SA icon to demonstrate active **Safeguarding Adults Episode**

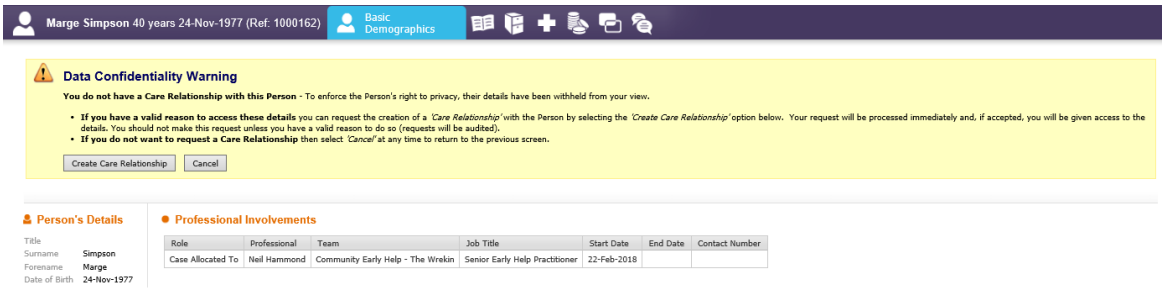
These can also be used for navigation to take you to the relevant part of the pathway.
There are lots of other icons like these that you will see throughout the system; if you hover over each icon it will provide an explanation of what they mean.

Note: In this example the results are split over five pages, to navigate through the pages click on the page number to the right of ‘Results’



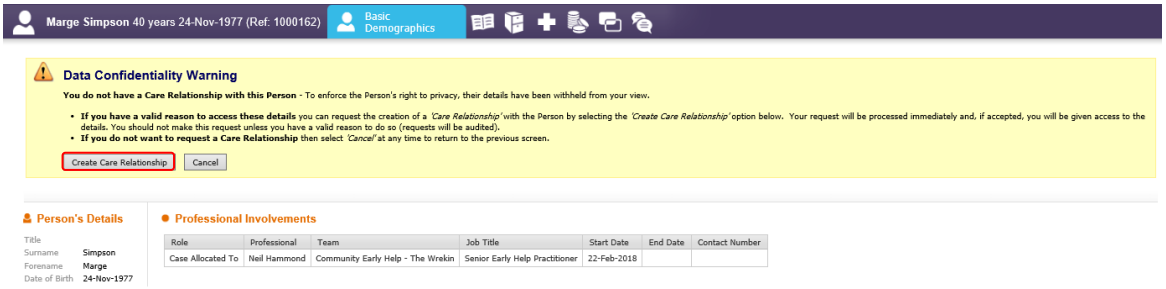
Care Relationships

Depending on your access rights, you may come across a screen similar to the below on some records that you access.

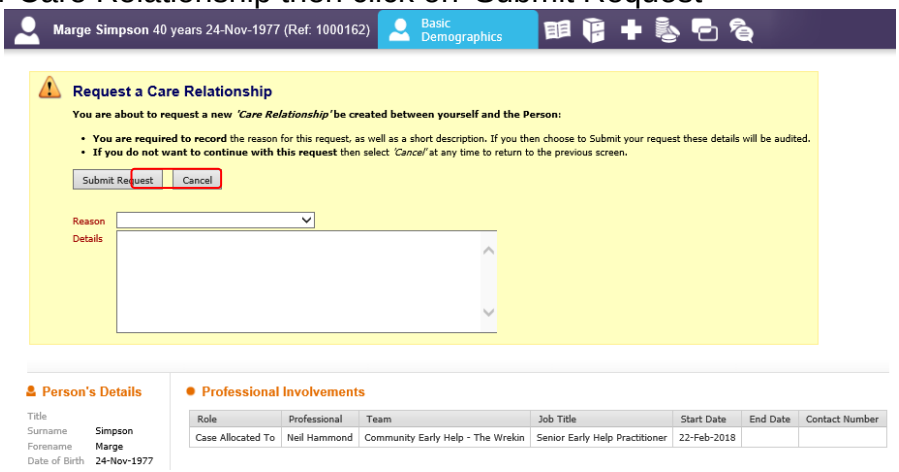


This is called the Care Relationships screen (also referred to as Legitimate Relationships). This functionality requires you to validate your relationship with the client's record you are trying to access, and state that you have a justifiable reason to be accessing the clients' record.
Note: If you have a Professional Relationship with a client e.g. Allocated Case Worker, OT, you will not see this screen as the system already knows you have a legitimate relationship/reason to be viewing the record.

The Care Relationship screen will display the clients' name, DOB and any professional involvements.
If you need to access the full client record click on 'Create Care Relationship'



You must enter a 'Reason' and 'Details' of why you need to access the full record to create your Care Relationship then click on 'Submit Request'

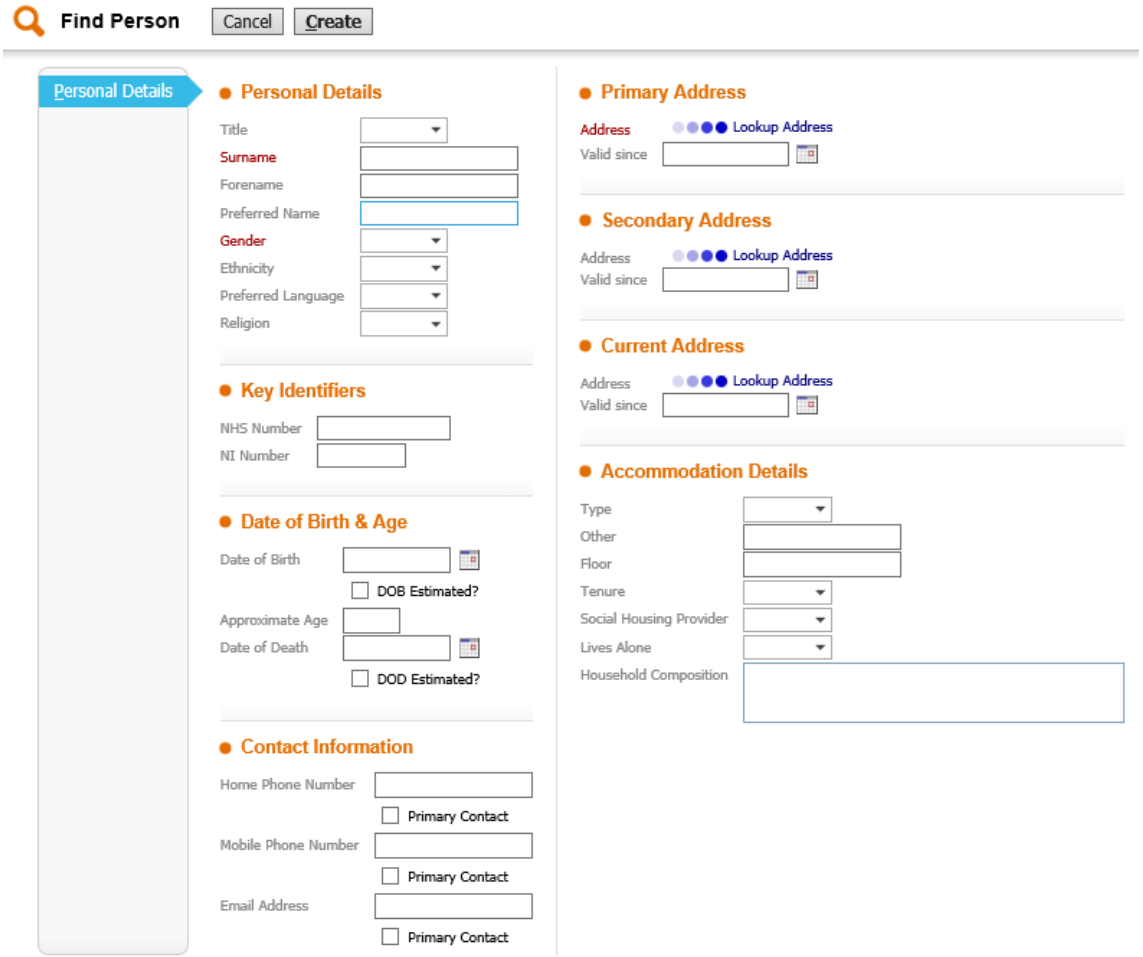


Creating a New Record

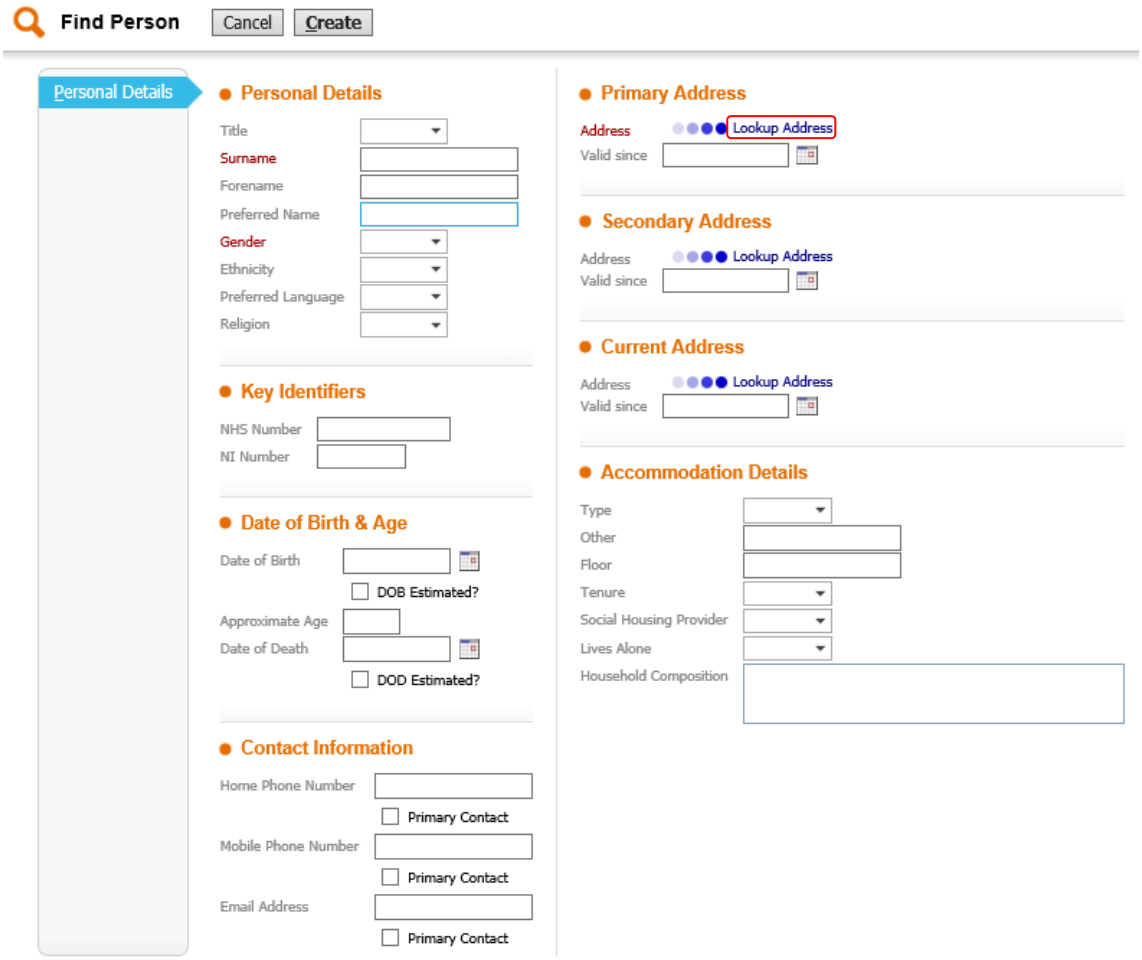
As with most systems, before we create a new record for an adult it is essential to execute a search to prevent the creation of duplicates. Always do at least three separate searches (e.g. name, DOB, address) to make sure there is not already a record on the system.

1. After completing three separate searches, if there are no results, click on Create

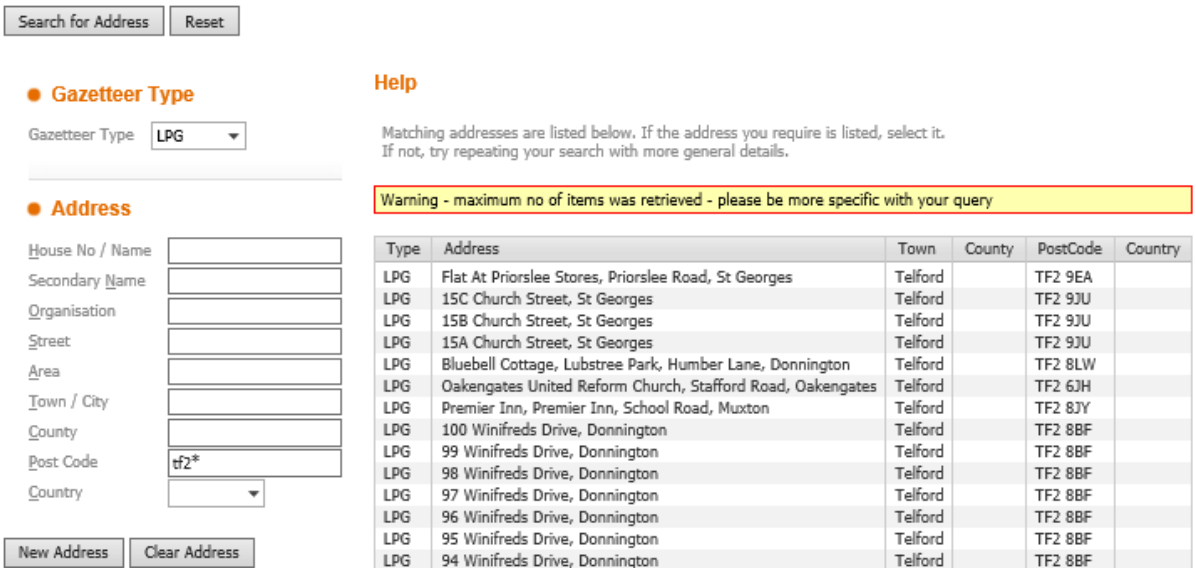
2. Record information as appropriate. Ensure mandatory fields (red) are completed. **Note:** If you are creating a person because you need to add a Contact Record you will need to record a DOB and an Ethnicity to be able to start the Contact



3. Click on ‘Lookup Address’ to search for an address

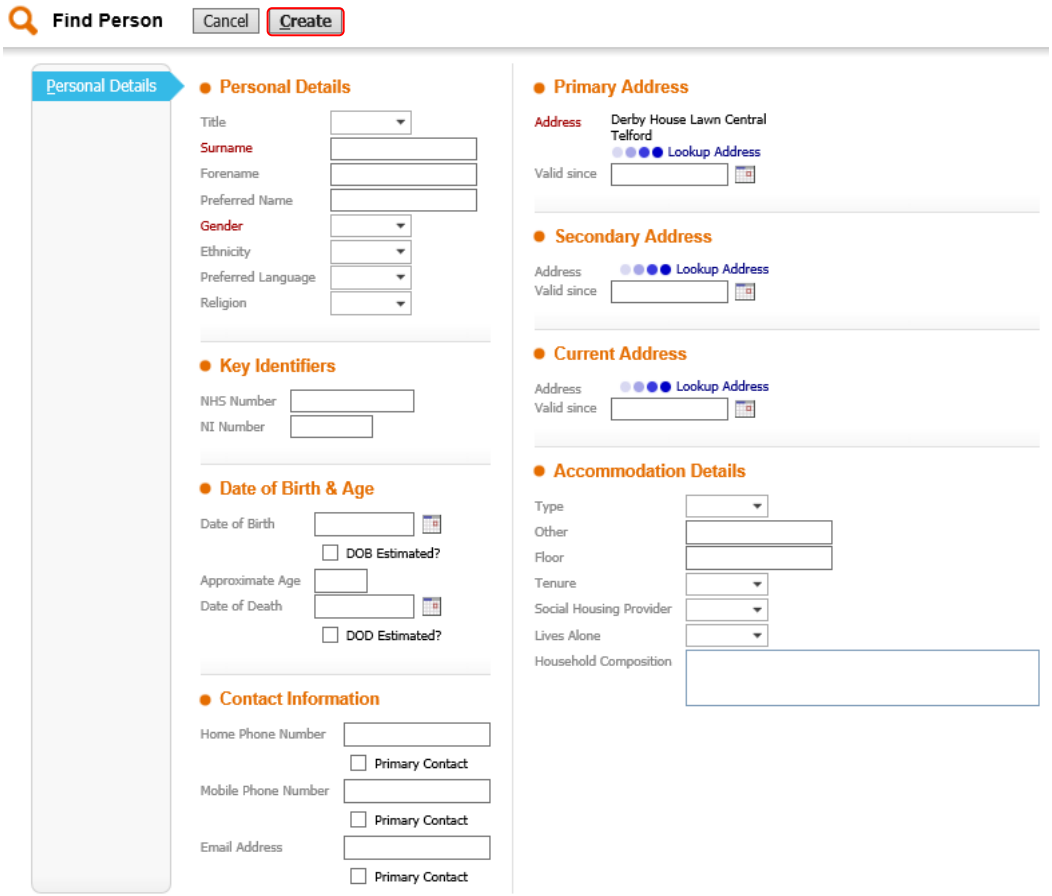


4. From the Gazetteer Type drop down select ‘LPG’, enter the address details in to the relevant fields (you can use the wildcard) and click ‘Search for Address’, then select the correct address from the search results
Note: Search using a number of methods e.g. postcode and house number, or house number and street address



Type	Address	Town	County	PostCode	Country
LPG	Flat At Priorslee Stores, Priorslee Road, St Georges	Telford		TF2 9EA	
LPG	15C Church Street, St Georges	Telford		TF2 9JU	
LPG	15B Church Street, St Georges	Telford		TF2 9JU	
LPG	15A Church Street, St Georges	Telford		TF2 9JU	
LPG	Bluebell Cottage, Lubstree Park, Humber Lane, Donnington	Telford		TF2 8LW	
LPG	Oakengates United Reform Church, Stafford Road, Oakengates	Telford		TF2 6JH	
LPG	Premier Inn, Premier Inn, School Road, Muxton	Telford		TF2 8JY	
LPG	100 Winifreds Drive, Donnington	Telford		TF2 8BF	
LPG	99 Winifreds Drive, Donnington	Telford		TF2 8BF	
LPG	98 Winifreds Drive, Donnington	Telford		TF2 8BF	
LPG	97 Winifreds Drive, Donnington	Telford		TF2 8BF	
LPG	96 Winifreds Drive, Donnington	Telford		TF2 8BF	
LPG	95 Winifreds Drive, Donnington	Telford		TF2 8BF	
LPG	94 Winifreds Drive, Donnington	Telford		TF2 8BF	

5. When selected, you will be taken back to the previous screen and the address details you selected will pull through.
   When you have completed as many of the boxes as you can, click ‘Create’.



All the information you have entered will appear within the basic demographics screen.

Basic Demographics

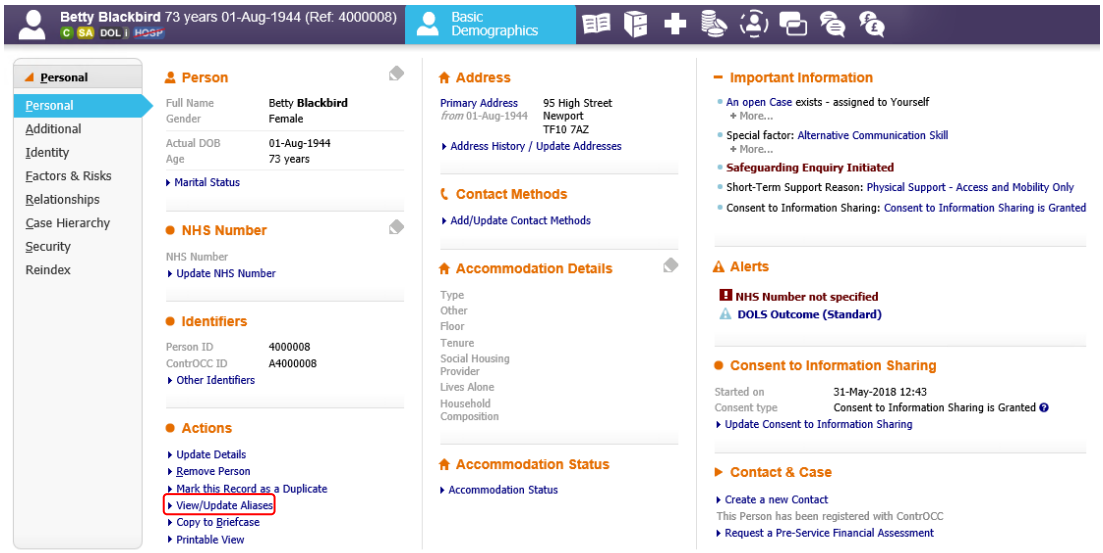
Personal

Within this tab you will be able to add and find the following information:

- Full Name and Aliases

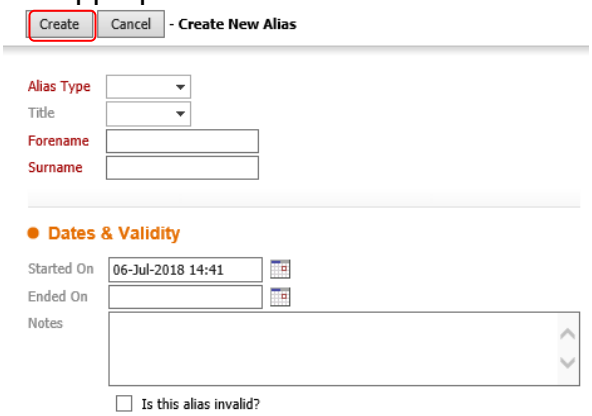
How to record Aliases:

1. Click on 'View/Update Aliases'



2. Click on 'Add a New Alias'

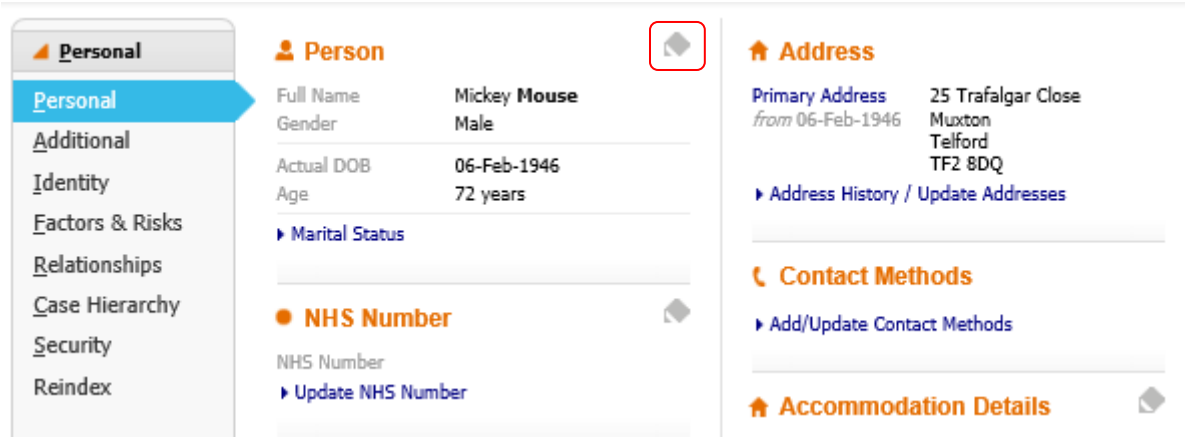
3. Complete the fields as appropriate then click on 'Create'



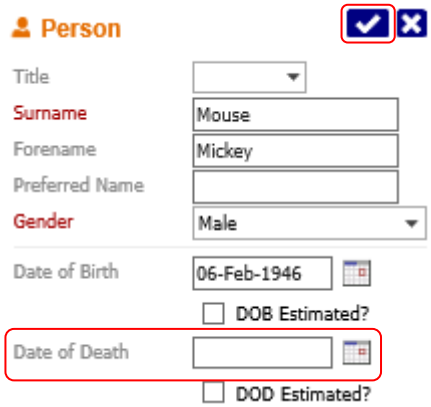
- Gender
- DOB/Age and DOD

How to record a DOD:

1. Click on the pencil within the 'Person' section



2. Record a date in the 'Date of Death' field then click the blue tick

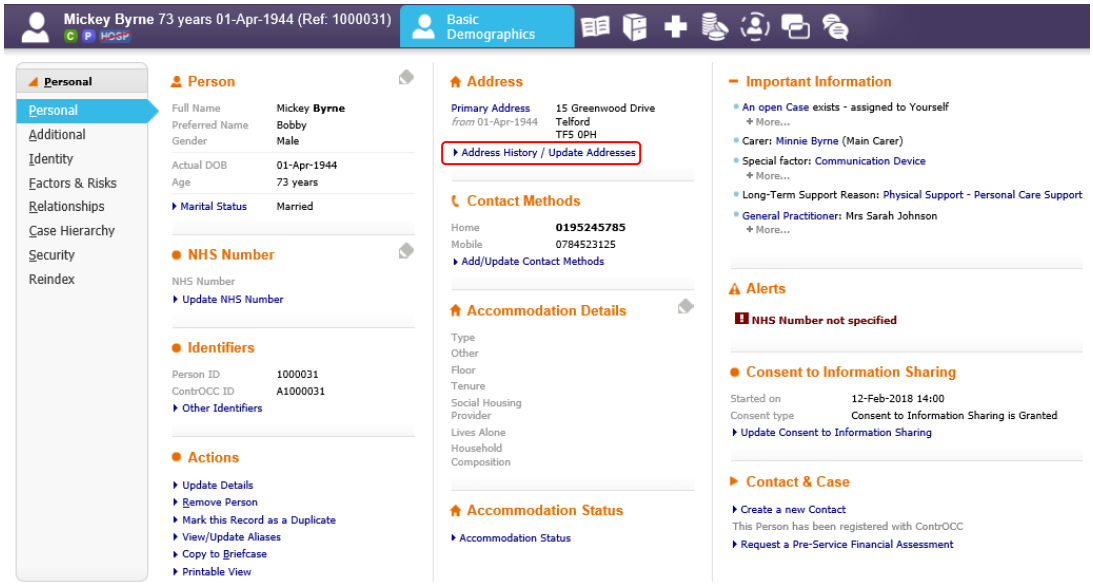


3. When a person has been recorded as deceased the allocated case worker/review tray and brokerage will receive a notification:

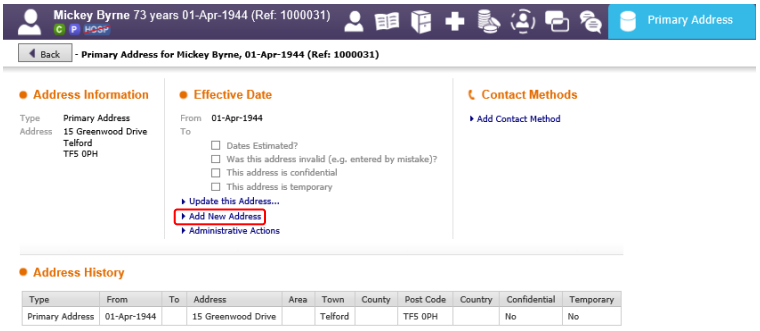
- NHS Number
- LAS Number and ContrOCC Number
- NI Number
- Current Address/es and Address History
  Note: clients can have different types of addresses: Primary (Where they live), Secondary, Current (e.g. Residential Home) and Other

How to change/add an address:

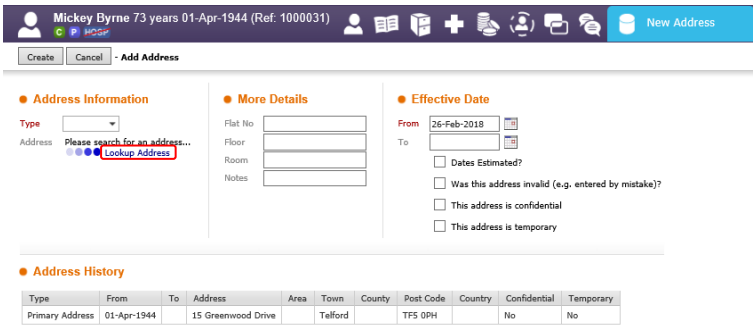
1. Click on 'Address History/Update Addresses'



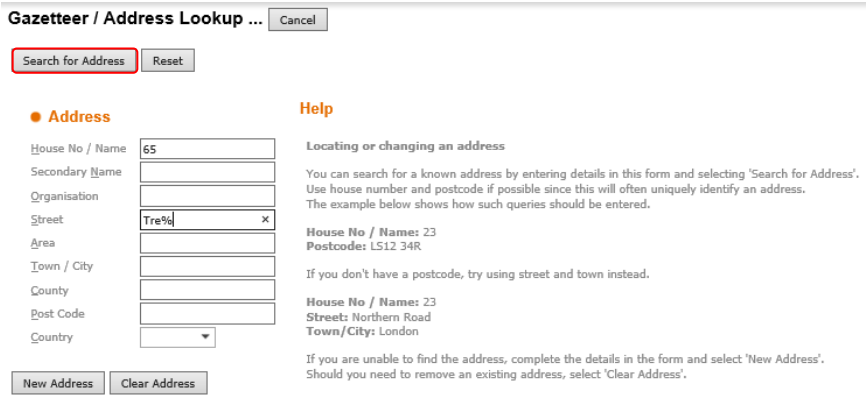
2. Click on ‘Add New Address’



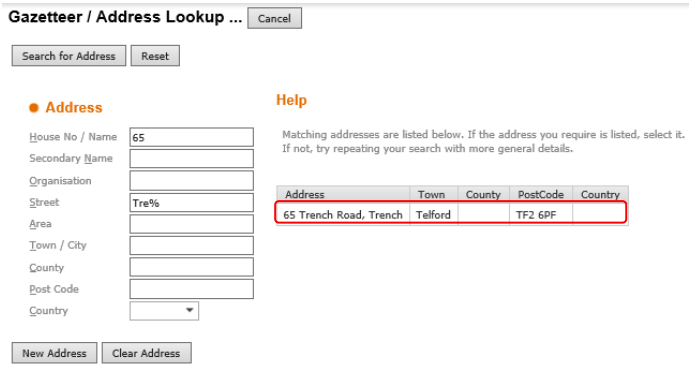
3. Click on ‘Lookup Address’



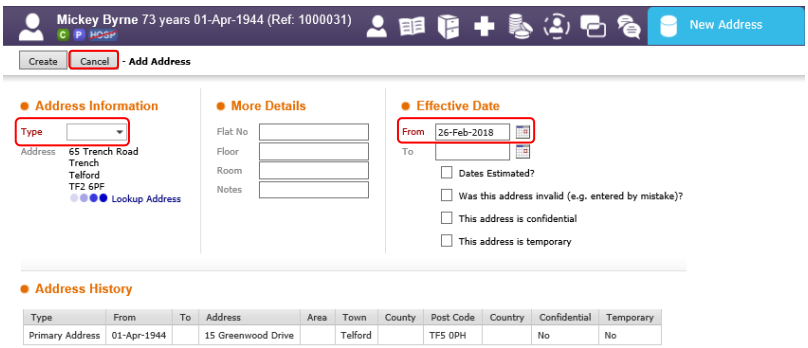
4. Enter your address details in to the fields (you can use the wildcard) and click on ‘Search for Address’
   Note: Search using a number of methods e.g. postcode and house number, or house number and street address
   Note: When updating the address when a client has died, search for the address by typing ‘deceased’ in the Street field



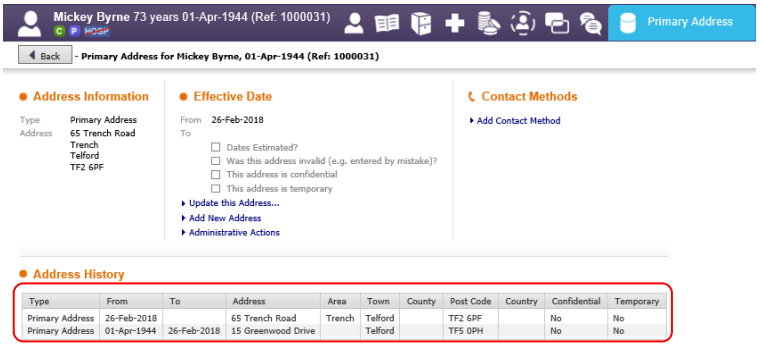
5. From the search results, select the correct address



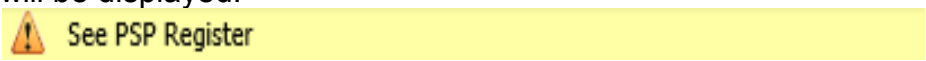
6. You will be taken back to the previous screen. Add in the address 'Type', and 'From' date, and any other relevant fields, then click 'Create'
   Note: If there is anything workers should be aware of at this address, e.g. if there is a dog at the property or where the person can be slow to answer the door, this is to be added in to the notes field



7. The new address has been added.
   Note: The previous address will automatically be given an end date (Primary Address only)



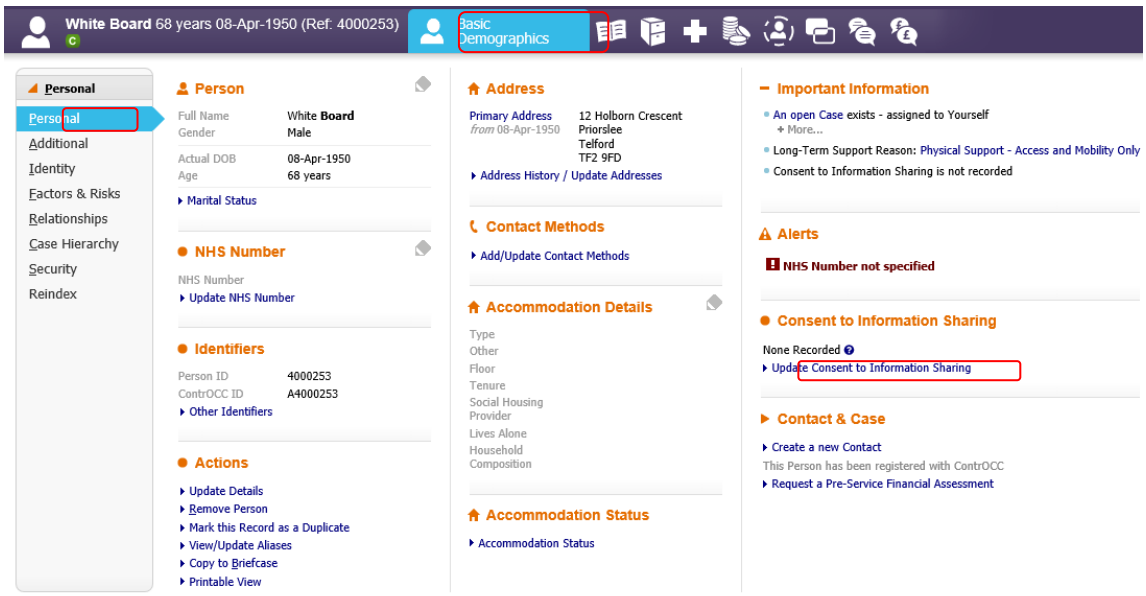
- Notice Banner – where a person is recorded on the PSP Register a 'Yellow Notice Banner' will be displayed.



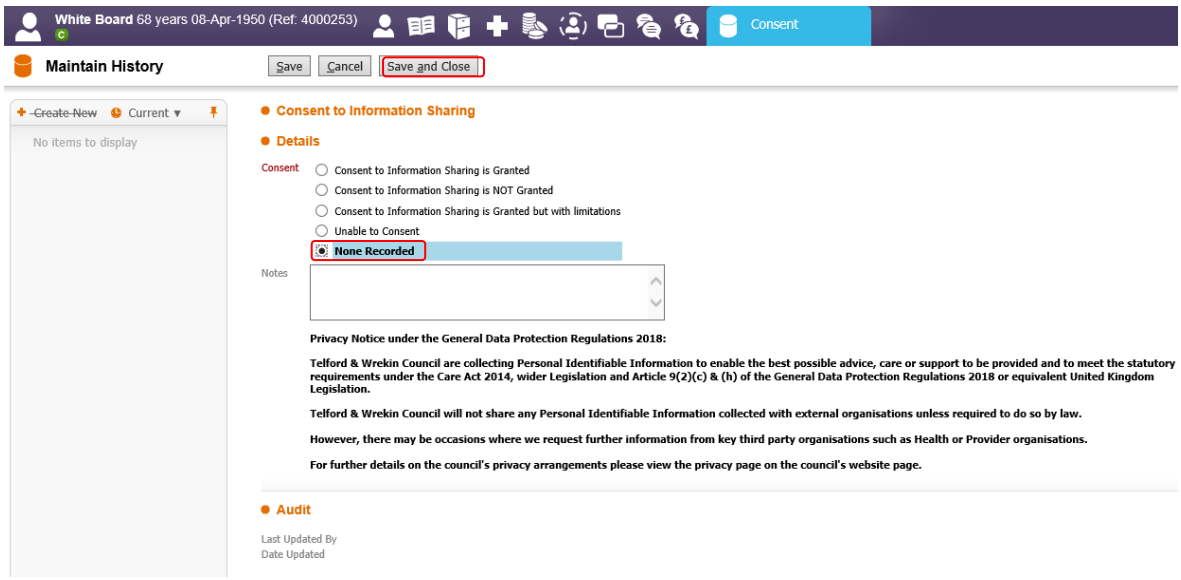
- Contact Numbers and Email Addresses
- Accommodation Details and Status
  Note: This is useful for an OT to look at when considering taking new equipment to a property
  Note: Accommodation Status: Settled means living independently and Non-Settled means not living independently
- Important Information e.g. who the persons carer is, long/short term support reasons, risks
- Alerts
- Consent to Information Sharing
  Note: This is a mandatory question in multiple forms throughout the system and will populate here if added to a form. It also always needs to be recorded as 'None Recorded'

How to Record Consent to Information Sharing:

1. Click on 'Update Consent to Information Sharing'



2. Select ‘None Recorded’ as Consent is not required as part of DPA 2018 and then click ‘Save and Close’



3. You will be returned back to the clients demographics.

- Info re any Open Contacts

<u>Additional</u>
Within this tab you will be able to add and find the following information:
- Legal Representation
- Legal Status
- Service User Groups
- Long-Term and Short-Term Support Reasons
  Note: Recording the PSR as ‘Social Support – Support to Carer’ will give the client a ‘Carer’ icon and enable the carer assessment/pathway to be initiated. Recording a Short-Term PSR will enable the enablement assessment/pathway to be initiated.
- Care and Support Eligibility
- CPA Level
- Learning Disability
- Mental Capacity
- Retention
- Audit Details

<u>Identity</u>
Within this tab you will be able to add and find the following information:
- Religion
- Ethnicity
- Nationality
- Immigration Status
- Language – this is where you can record if a translator is required
- Sexual Orientation
- Disability Consideration

- Current Employment

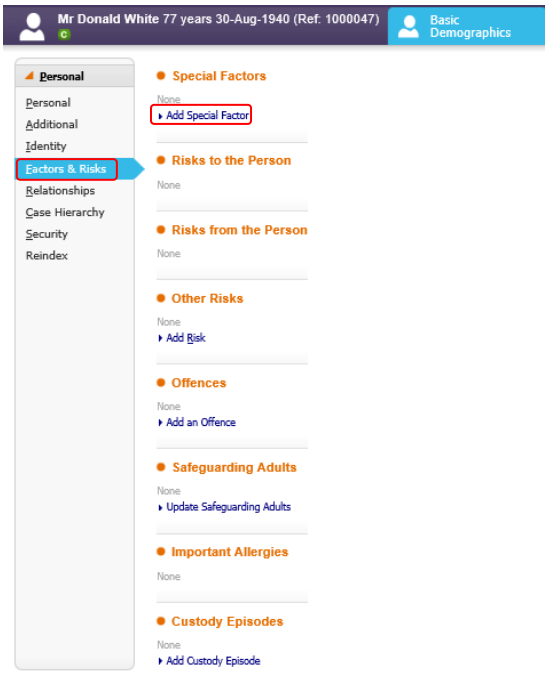
Factors & Risks

Within this tab you will be able to add and find information regarding the following:

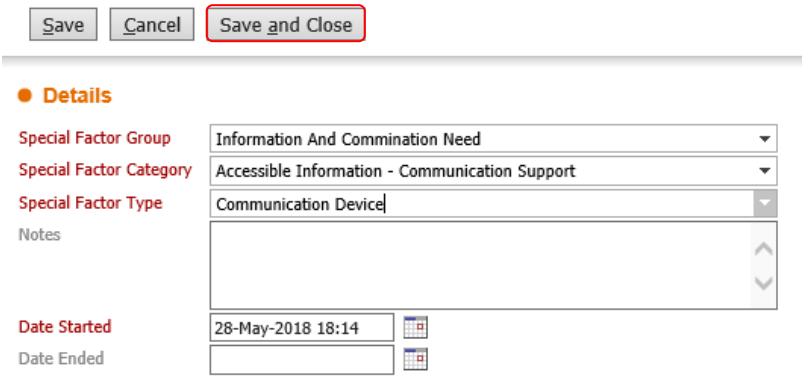
- Special Factors
  Note: This is where Financial Status (e.g. full cost client/CHC), Information & Communication Needs (e.g. accessible information - this does not include language and/or dementia) and Safety & Wellbeing (e.g. contact via) are to be recorded

How to add a Special Factor:

1. Click on 'Add Special Factors'



2. Complete the fields as appropriate then click on 'Save and Close'



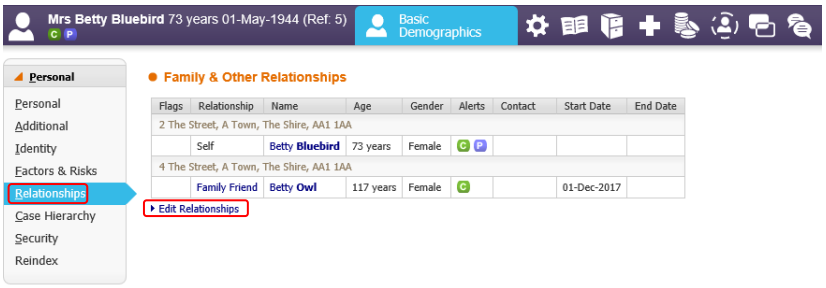
Note: Where an Information and Communication Need has been migrated from CareFirst this will be displayed with the words 'Migrated' followed by the type of need.

Note: We would recommend that you add a new special factor using the steps above (ensure you end the current one first) when you update the record for this first time after the move to LAS to ensure that the information pulls in to the forms. This can also be done from within the assessment forms.

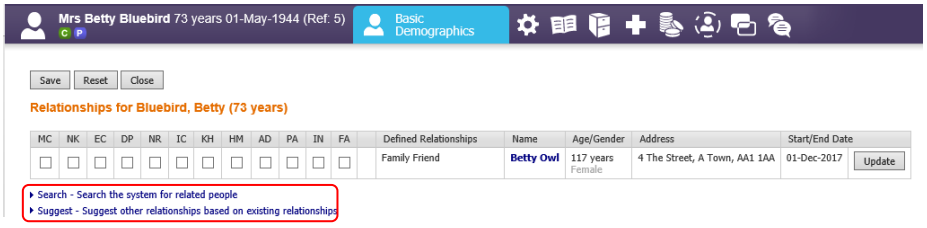
- Risks to/from the Person
- Other Risks
- Offences
- Safeguarding Adults
- Important Allergies
- Custody Episodes
  Note: Any information recorded in these sections feeds through in to the 'Important Information' section of the Personal tab

<u>Relationships</u>
Within this tab you will find all personal relationships connected to the person (both active and inactive relationships)

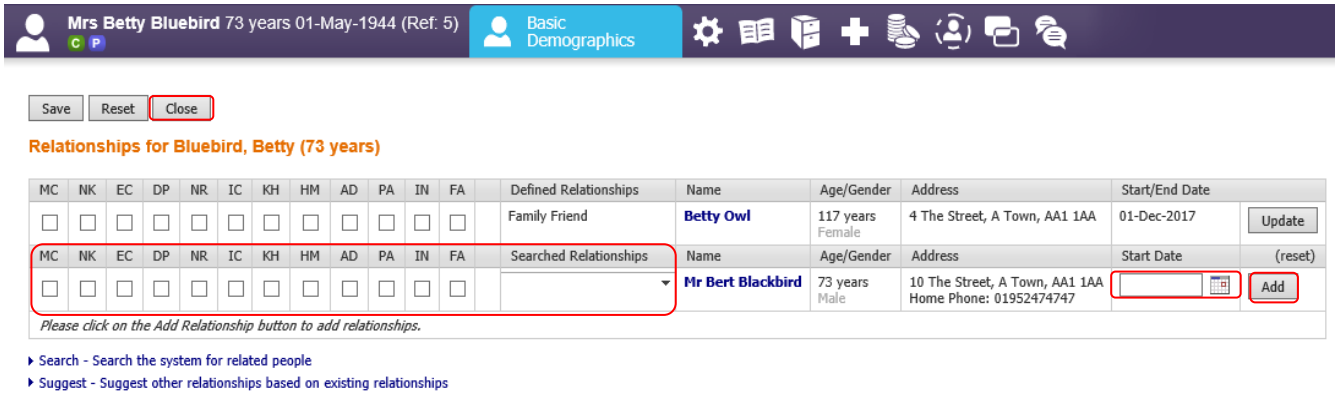
How to add a Personal Relationship to a clients record:
1. Click on Edit Relationships



2. You have two options:
- Search – this allows you to search the system to see if a record already exists and then add them as a relationship. The search screen works in the same way as searching for any record.
  Note: If you search and the person you are trying to find is not on the system, you will have the option to create them at this point
- Suggest Relationships – the system will suggest a list of people that have a record on the system that may have mutual relationships with the person, and/or are living at the same address



3. When you have searched to find the record, or have identified the record from those suggested, you will need to:
   a) Select the type of relation the person is from the drop down list
   b) If applicable, tick any relevant boxes next to the relationship:
      - MC (main carer)
      - NK (next of kin)
      - EC (emergency contact)
      - DP (Dependant)
      - NR (Nearest Relative)
      - IC (Informal Carer)
      - KH (Key Holder)
      - HM (Household Member)
      - AD (Advocate)
      - PA (Lasting Power of Attorney)
      - IN (Invoicee)
      - FA (Financial Agent)
   c) Enter a Start Date (if no date is entered, it will populate with today's date)
   d) Click on 'Add'
   e) Click on 'Close'



Note: Personal relationships can also be linked via the Contact Record

Case Files

Summary

Within this tab you will be able to find the following information:

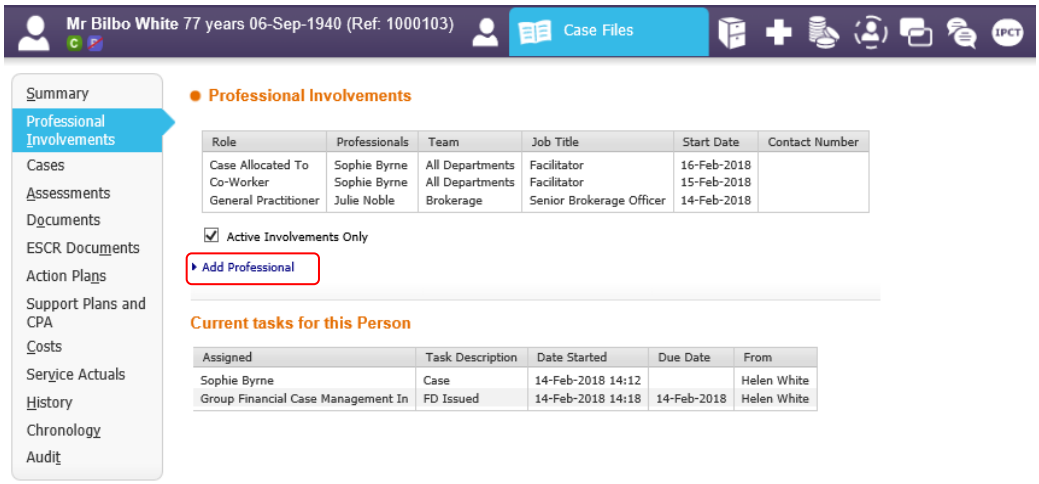
- Details of any recent Contacts
- Details of any recent Cases
- A summary of Assessments
- Combined Client Assessments

Professional Involvements

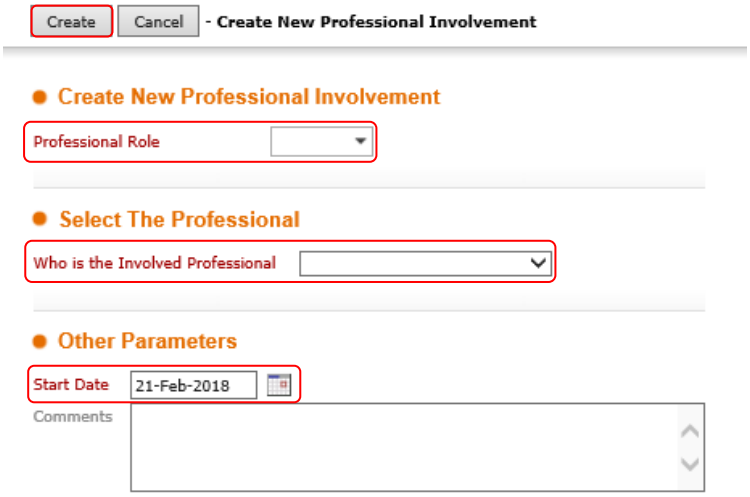
Within this tab you can see which Professionals are working with the person (e.g. Allocated Worker, GP's, OT's).

How to add a Professional Involvement to a clients record:

1. Click on 'Add Professional'



2. Select the appropriate heading from the 'Professional Role' picklist
   Select the appropriate heading from the 'Who is the Involved Professional' picklist
   Note: 'A Professional on the system' allows you to search for a professional who has been added to the system. Type their name in the field provided and select them. If the professional you are looking for does not appear to be on the system change your picklist option to 'Any other Professional' and manually enter their details in to the fields provided. Otherwise, select your own name from the picklist if you are adding yourself as a Professional.
   Enter a Start Date and click on Create



Note: Professional Involvements can also be linked via the Contact Record

You can also see any current tasks for this person. This list shows you which tasks/alerts are outstanding, and whose worktray they are in.

Cases

Within this tab you will be able to add and find the following information:

- Details of any Contacts
- Safeguarding Enquiry List
- DOLS Episodes
- Details of any Cases
- Requests for Support

Assessments

Within this tab you are able to find all assessments that are either in draft or have been completed on this record. E.g. Core Assessment, Financial Assessments. These link in to the Care Pathway which is accessed via the two square boxes at the top of the record.

Note: There is a text filter on this page to assist you with finding what you are looking for

Note: Where an Assessment has been migrated from CareFirst this will be displayed with the words 'Migration Migration'. However, the content of migrated assessments can only be viewed via the Documents tab.

Documents

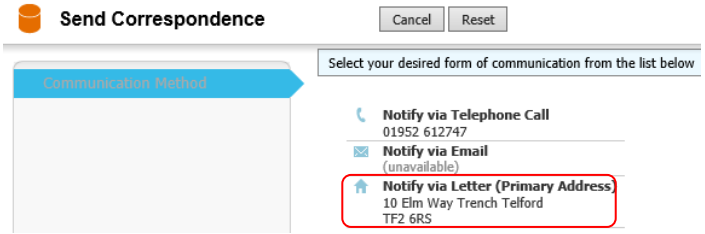
- View all other forms (not assessments) that are either in draft or have been completed on this record. E.g. OT/AT Support Plans, Reviews, Migrated Assessments

- Details of the location of any archived files
- Generate letters/correspondence

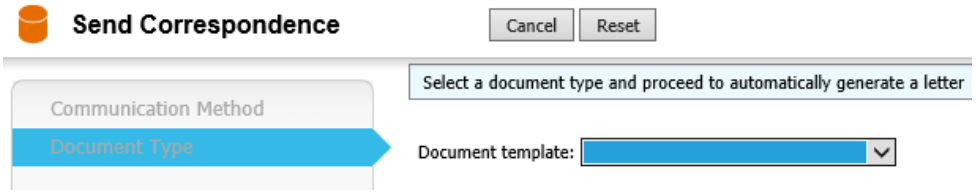
How to generate Letters (CareLetters):

1. From within the Case Files tab, select Documents on the left hand menu. Click on 'Send Correspondence'

2. Click on 'Notify via Letter'

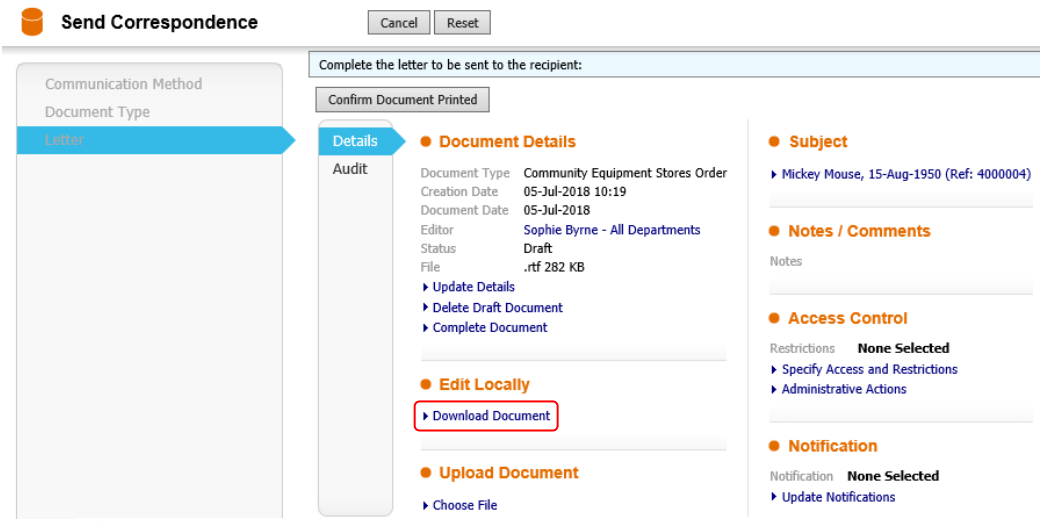


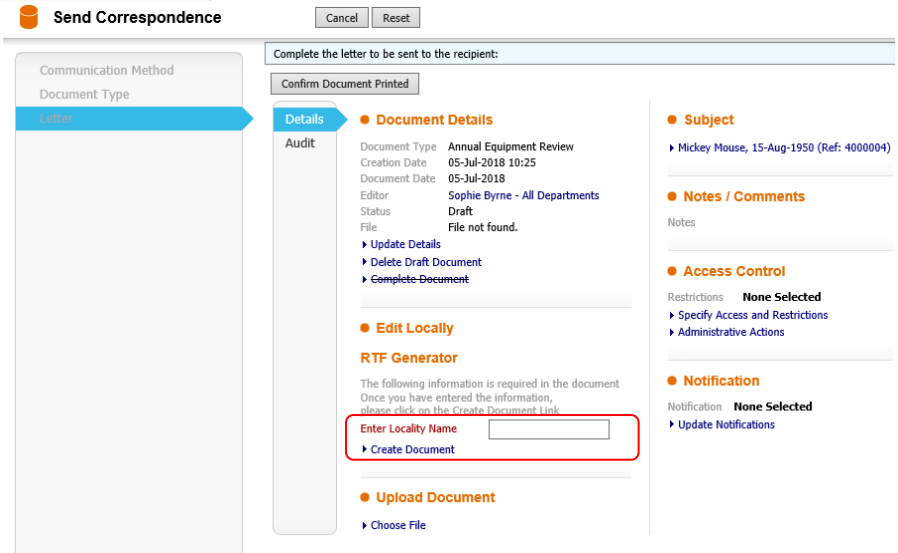
3. Select the letter you wish to send from the picklist



4. The system will generate the letter for you. Click on 'Download Document' and then 'Open' to view the letter.

   Note: Some letters require additional information to be added e.g. the Locality Name. You will be required to enter this information and click on 'Create Document' before you are able to download the document.



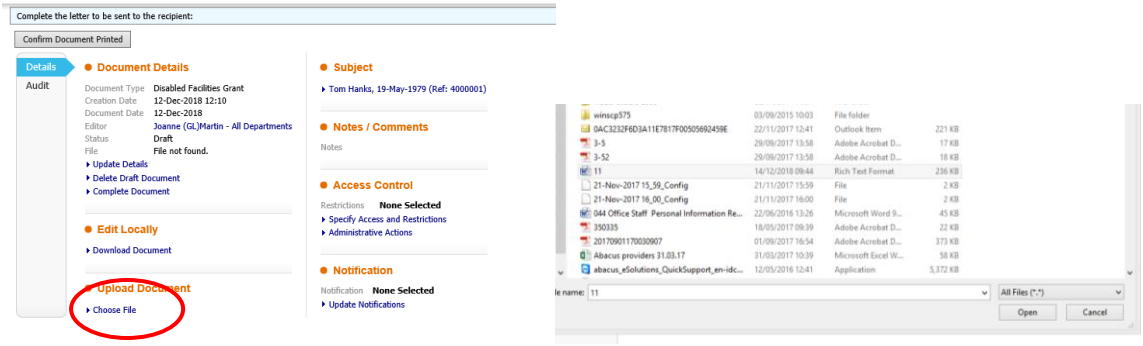


5. Click on ‘Download Document’.
   Note – If you need to make changes to the template click ‘Save and Open’ by clicking on the drop down arrow

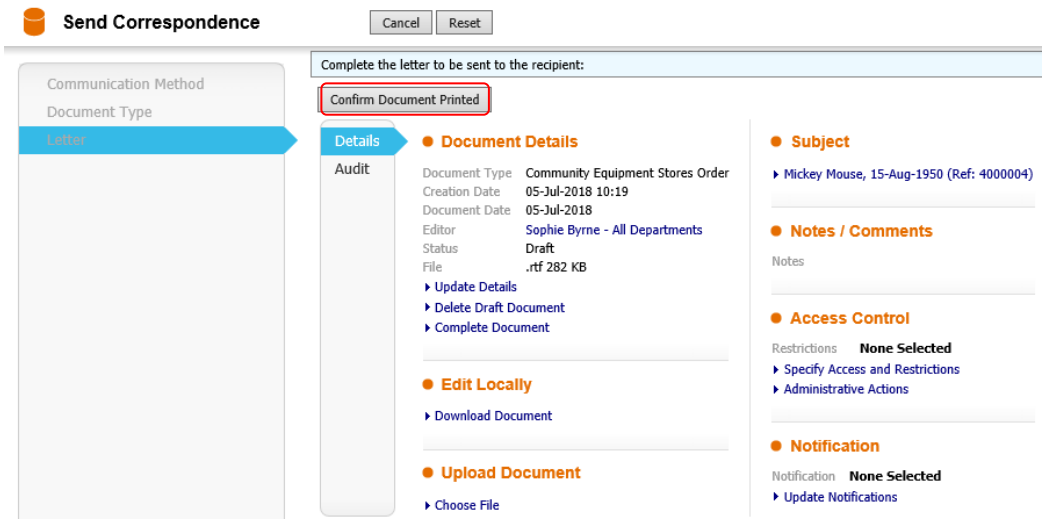
6. The letter will open up in Word; check the information is correct and edit where necessary, click ‘Save’ to save changes. You can print the letter in the normal way and close the Word document.

   Note – do not change the file name when saving

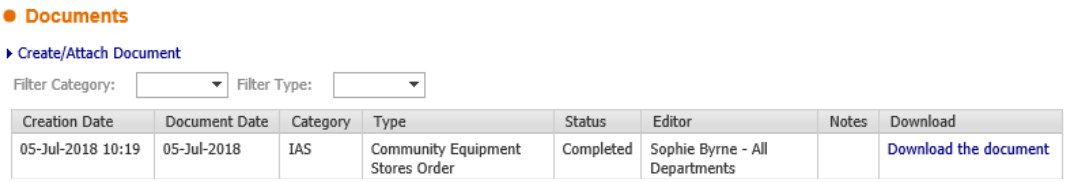
7. If you have made changes you need to upload the document. Click ‘Choose File’ and navigate to where the letter was saved, select the document and click ‘Open’



8. Once the letter has been printed/saved click on ‘Confirm Document Printed’



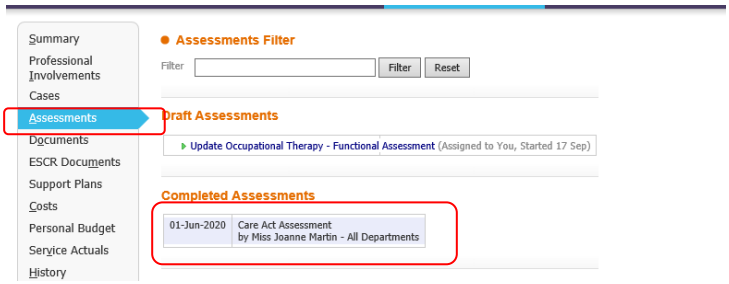
9. The letter will automatically be stored on the clients record and able to be viewed from underneath the ‘Documents’ section



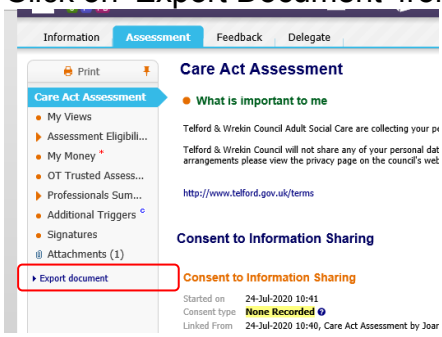
How to generate a printed version of Assessments and Support Plan

The document can either be printed or emailed securely to the person.

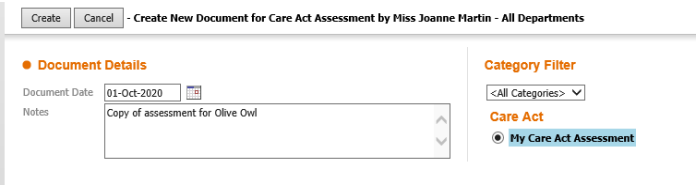
1. From within the Case Files tab, select Assessments on the left hand menu and select the Assessment that you need to produce as a document.



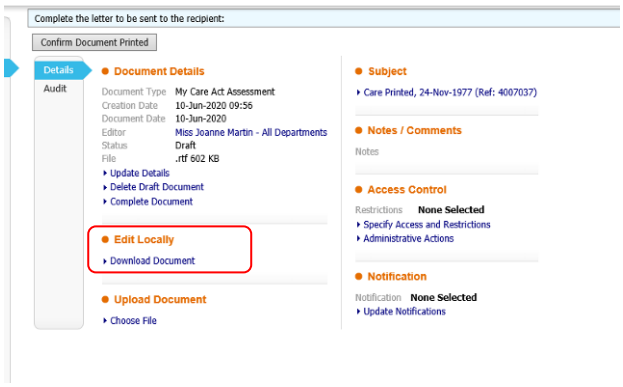
2. Click on 'Export Document' from the left hand menu.



3. Enter the date you wish to generate the document, you can enter some notes as the version or who the document is for. Select the appropriate assessment/support plan you wish to print from the picklist on the right and click 'Create'.



4. Click on ‘Download Document’



5. A pop message will appear (this may look different depending on how you are accessing LAS), click in the document icon in the bottom left hand corner.

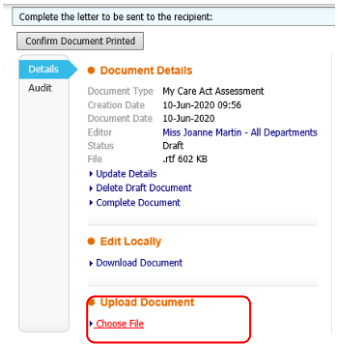
6. The printable version will open in Word and you can make any changes to the document can be made e.g. there maybe sections that are not appropriate to include due to the nature of the situation.

7. You need to check the address recorded for the person on the LAS record and add it to the generated form.

   Where there are sections of the form that are not relevant to the person and blank or should not be shared you must ensure that they are removed.

   Once you have made your changes ensure you save these to a suitable network drive, print your document as normal and close the word document or attach it to an email sent securely as per Corporate Policy.

8. You now need to go back to LAS and upload the final version of the document. Click ’Choose File’ and navigate to where you saved the document, select it and click ‘Open’



ESCR Documents
Within this tab this is where you will find all of the documents that have been uploaded via Information@Work.
All documents from CareFirst will be migrated in to this tab.

Support Plans & CPA
Within this tab you are able to find support plans that are either in draft or have been completed on this record, and any service provisions that are in place for the person. These link in to the Care Pathway which is accessed via the two square boxes at the top of the record.
Note: There are filters for the Support Plans and Service Provisions to assist you with finding what you are looking for

Costs
Within this tab you are able to view the annual costs for any service provisions in place, including the costs for the next financial year.

Service Actuals
Within this tab you are able to pull a 'Snapshot Report' which will tell you all of the service actuals that have been delivered to the client; based on what has been input in to ContrOCC.

History
Within this tab you will be able to find a list of everything that has ever been added or amended on the record. From this list you can select which items you want to add in to a Chronology.

Chronology
When you have selected items from the History tab to form your Chronology, the system will build your Chronology for you and it will sit within this tab.

Health Records

Health Overview

Within this tab you will be able to find the following information:

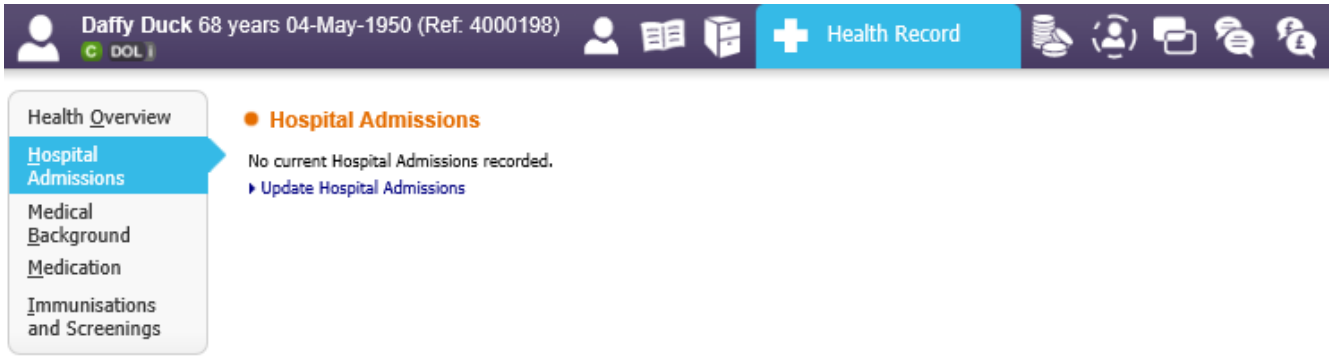
- Recent Hospital Admissions
- Recent Discharge Notifications
- Recent Diagnoses
- Recent Injuries
- Recent Medication

Hospital Admissions

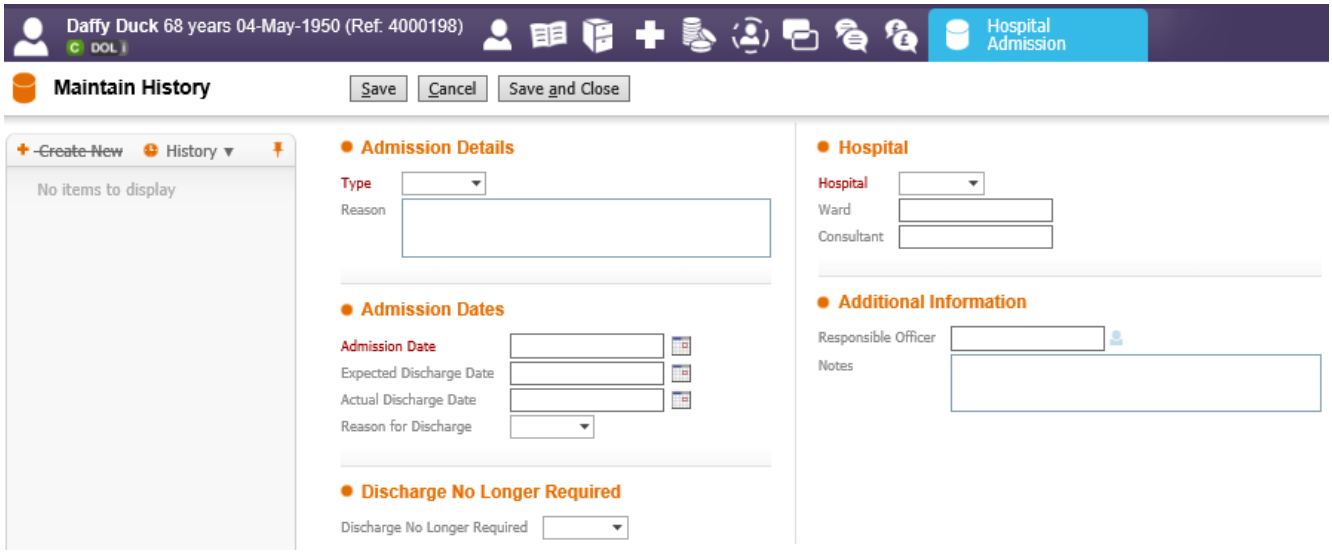
Within this tab you can add and find details of any Hospital Admissions (planned and emergency) and Discharge Notifications for this person. This will trigger an alert to Brokerage and the Allocated Practitioner to make any necessary arrangements.

How to record Hospital Admission/Discharge:

1. Click on 'Update Hospital Admission'



2. Complete details as appropriate and click 'Save and Close'



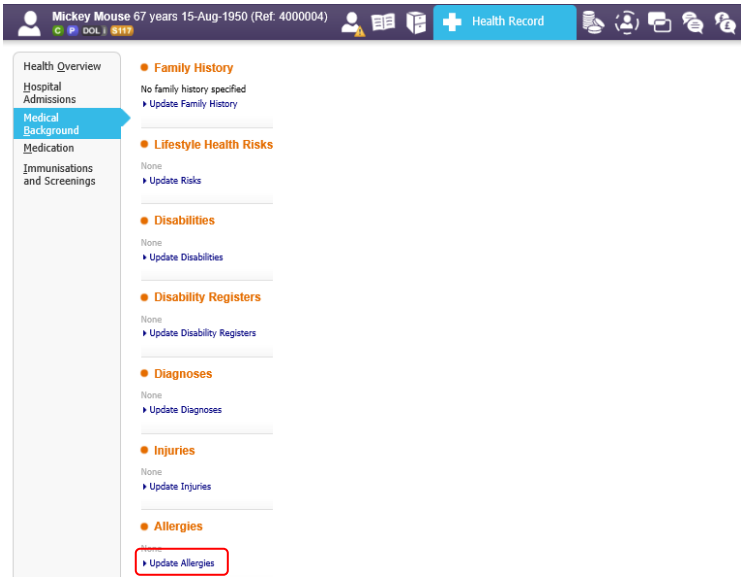
Medical Background

Within this tab you will be able to find the following information:

- Family History
- Lifestyle Health Risks
- Disabilities
- Disability Registers
- Diagnoses
- Injuries
- Allergies

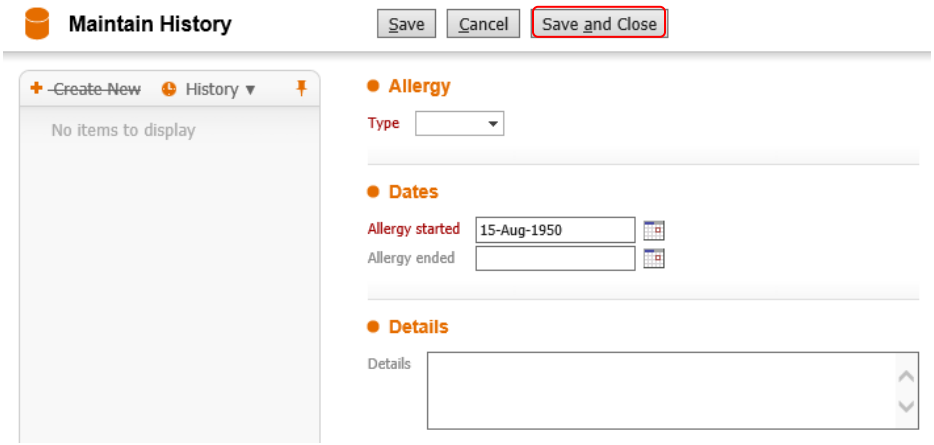
How to add an Allergy:

1. Click on 'Update Allergies'



2. Complete the fields as appropriate then click on 'Save and Close'

   Note: The 'Date Started' field automatically defaults to the clients DOB; change this if this is incorrect.



- Health Conditions

<u>Medication</u>

Within this tab you can add and find details of any Medication this person may be taking.

<u>Immunisations and Screenings</u>

Within this tab you can add and find details of any Immunisations and Screenings the person may have had.

Activities and Benefits

Summary
Within this tab you will find a summary of all recent activities, benefits, blue badges and permits.

Activities
Within this tab you can add and find details of any activities.

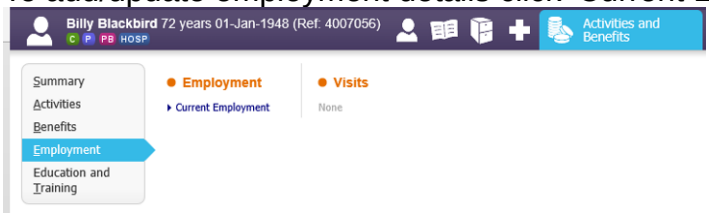
Permits
Within this tab you can add and find details of any blue badges and permits the person may hold.

Benefits
Within this tab you can add and find details of any benefits the person may receive.

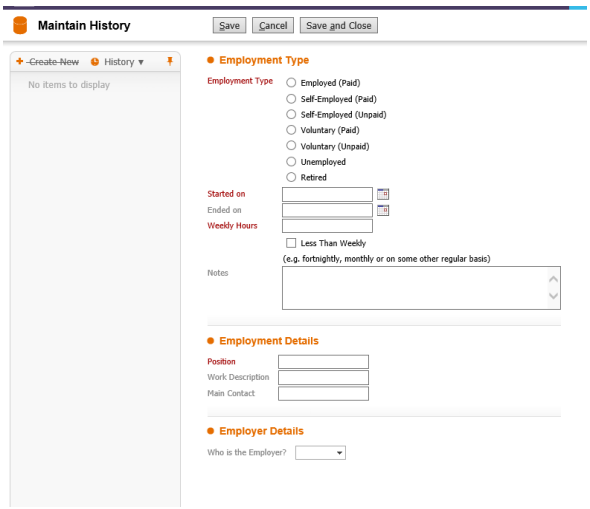
Employment

Within this tab you can add and find details of any employment.

1. To add/update employment details click ‘Current Employment’



2. Select the ‘Employment Type’, ‘Start Date, ; Weekly Hours’ the ‘Position’ the person holds and any other information you have.
3.

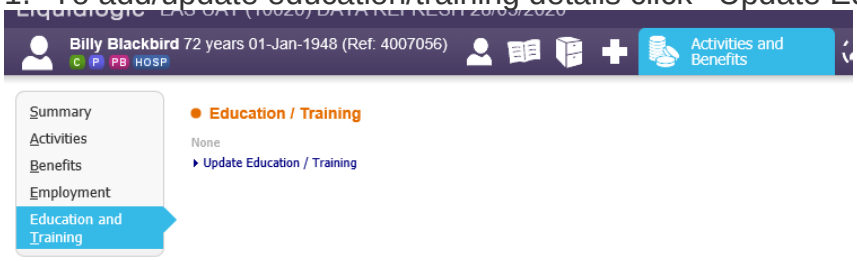


4. Click ‘Save and Close’

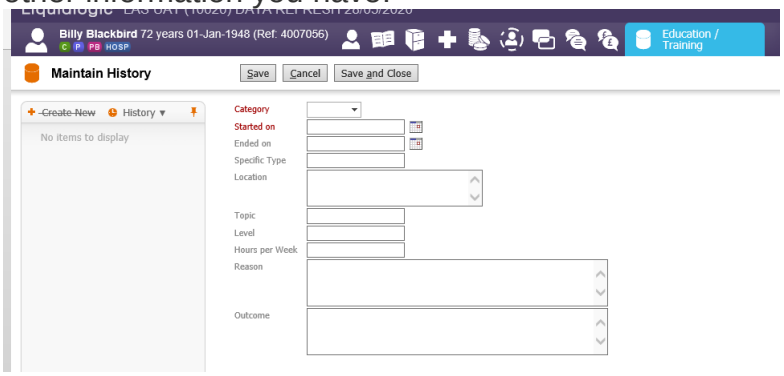
Education and Training

Within this tab you can add and find details of any education and training the person may have done.

1. To add/update education/training details click ‘ Update Education/Training’

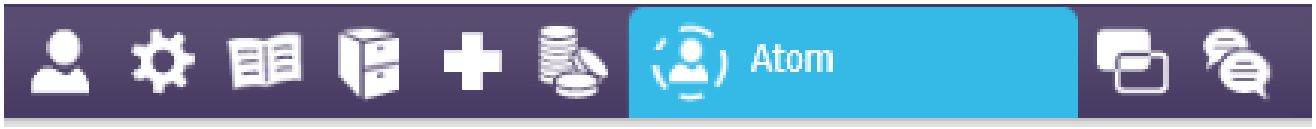


2. Select the type of education from the ‘Category’, the ‘Started date’ and any other information you have.



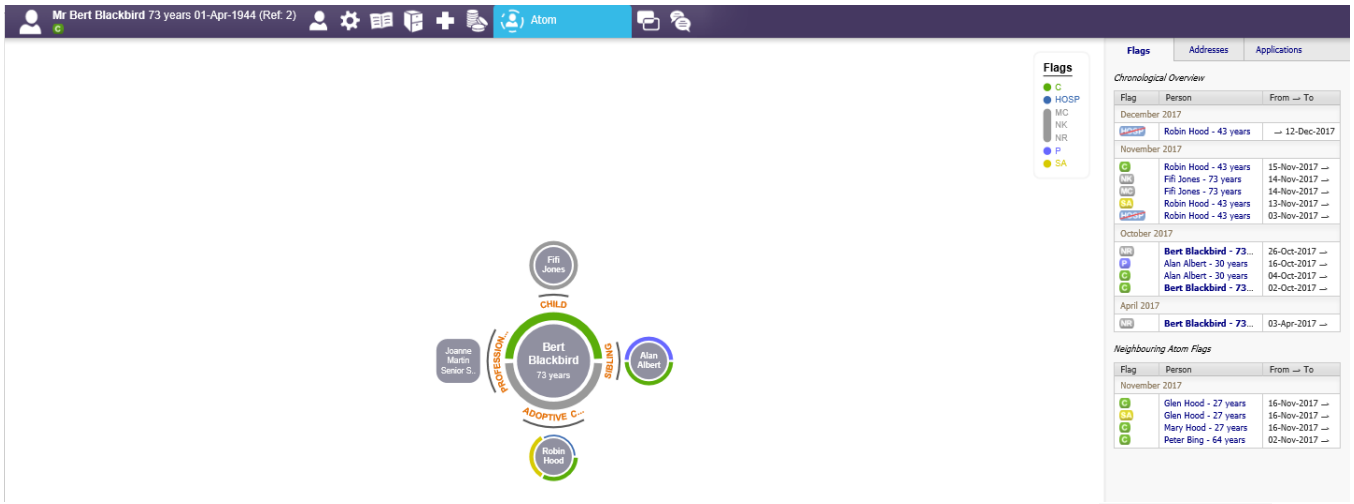
3. Click ‘Save and Close’

Atom



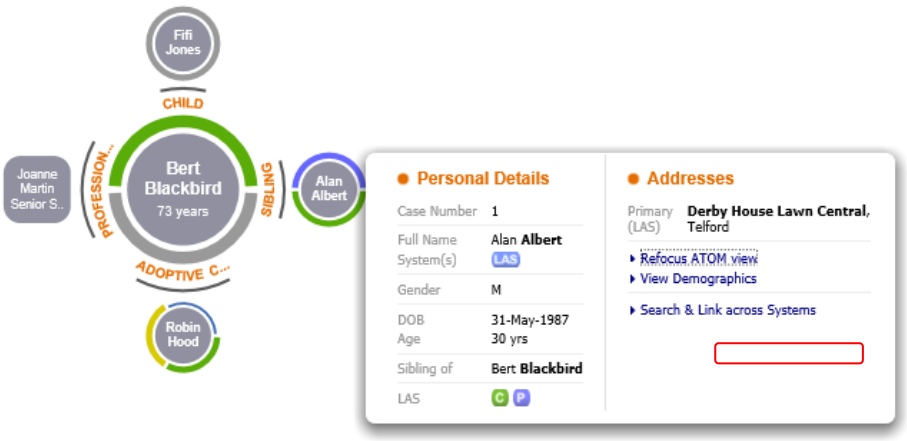
The Atom provides a graphical representation of the people and agencies involved with a client, and their wider familial network, including those on other systems.

ATOM will display the person (the record you're in) at the centre of the ATOM

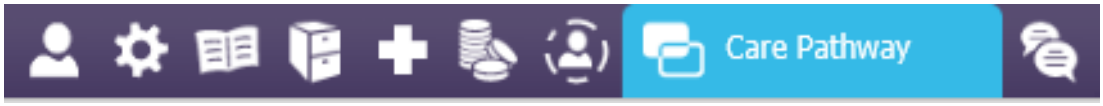


There is a key on the right of the screen under 'Flags'. When you hover over any of the items the ATOM will flash accordingly to show you who the item relates to.

By clicking on a person's record from within ATOM, a pop up box is displayed, showing the various demographic details and any flags/icons against the person. The ATOM can be refocussed by left clicking on another person's record and selecting the Refocus ATOM View link.



Care Pathway



Once a Case has been opened for a person on the LAS system, the Care Pathway Map can be accessed via this link, together with a full set of available actions.

This is where you will start any Assessments and Support Plans etc. for open clients. You will learn about this section in more detail in other LAS courses.

Note: This tab will only display if the client has, or has had, an open case

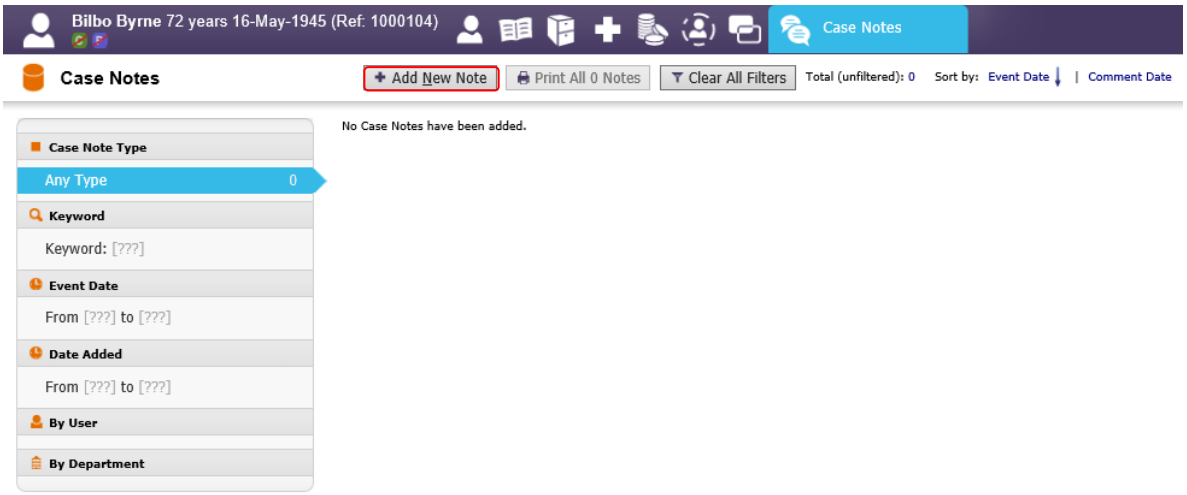
Case Notes

Case notes are short details of contacts made with the Client, GP etc. E.g. telephone calls, emails.

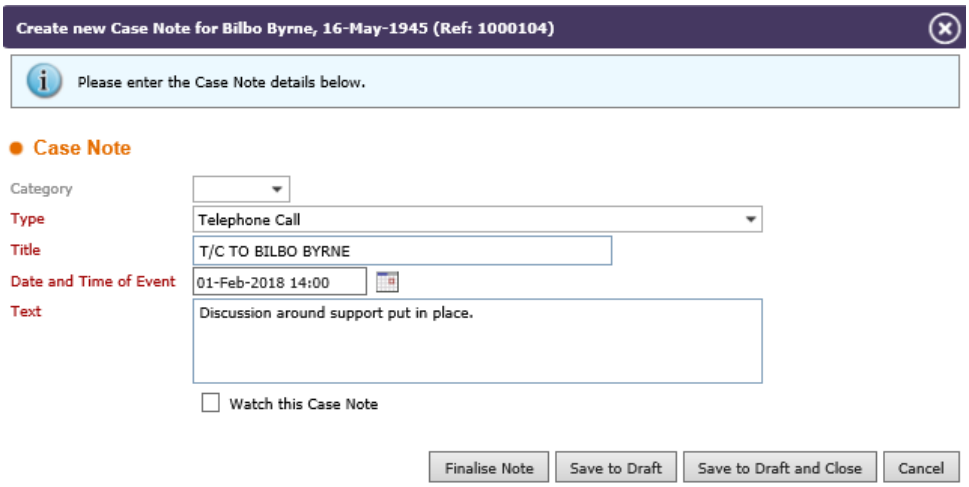
Case notes are not to be used to record assessment information.
Note: Where a client has had equipment issued prior to LAS this will be recorded as a case note with the type of 'Personal Care'.

How to add a case note:

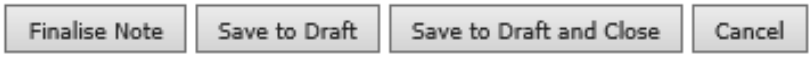
1. Click 'Add New Note'



2. Select an appropriate option from the 'Type' picklist
   Enter a Title for your Case Note. **Note:** This needs to be something that will allow you to identify the note later
   Enter the Date and Time of Event **Note:** time needs to be in a 24 hour format
   Enter the details of the Case Note into the Text field

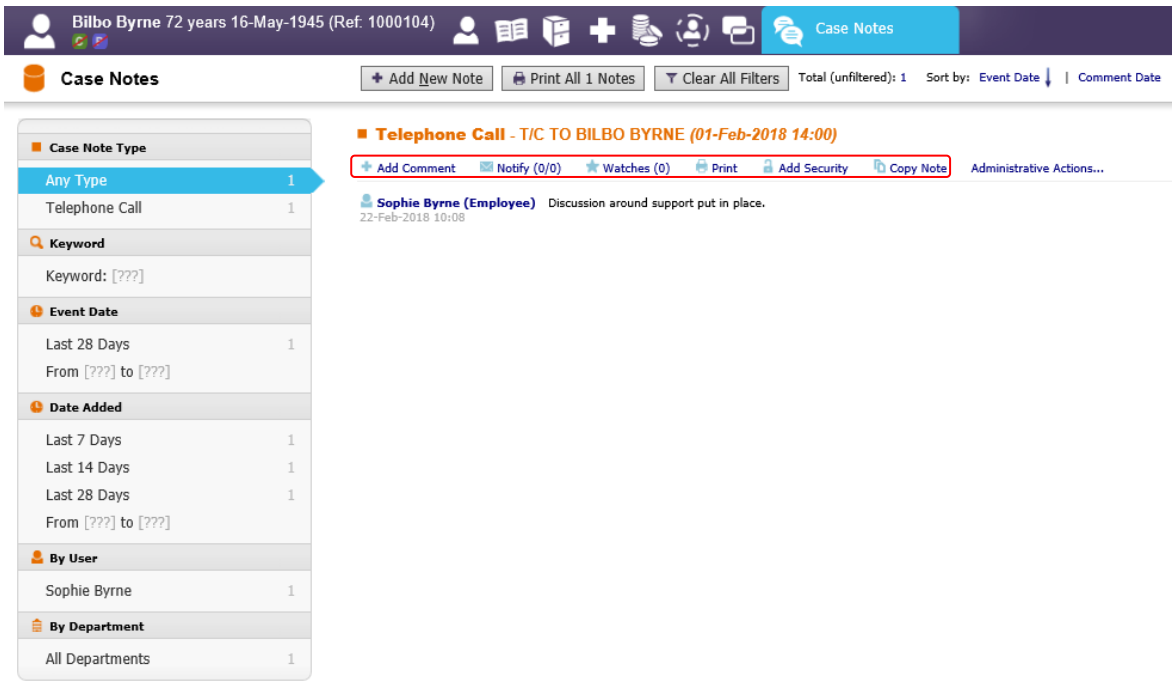


3. You now have a few different options of what you can do with your case note:

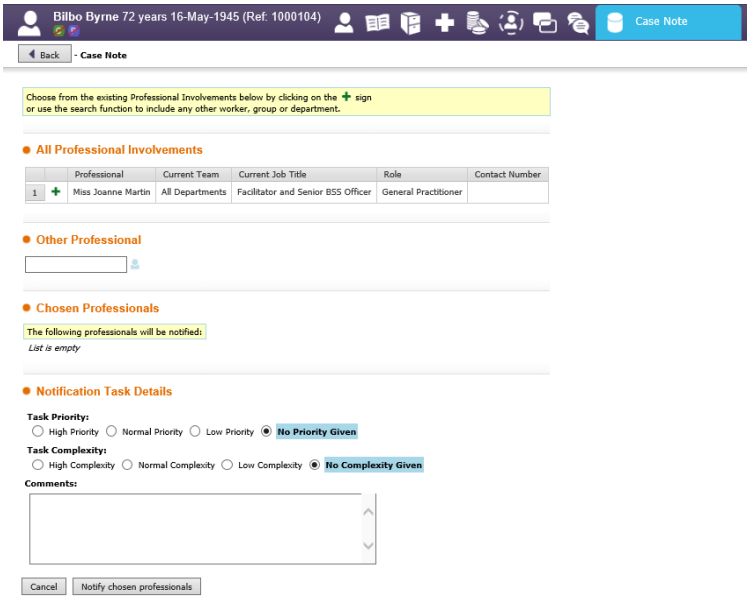


   a. Finalise Note will complete the case note and make it Read Only, preventing further editing
   b. Save to Draft will save the information entered
   c. Save to Draft and Close will save the information entered and take you back to the Case Notes screen; you will be able to come back to the Case Note later to edit
   d. Cancel will not save your Case Note and will take you back to the Case Notes screen

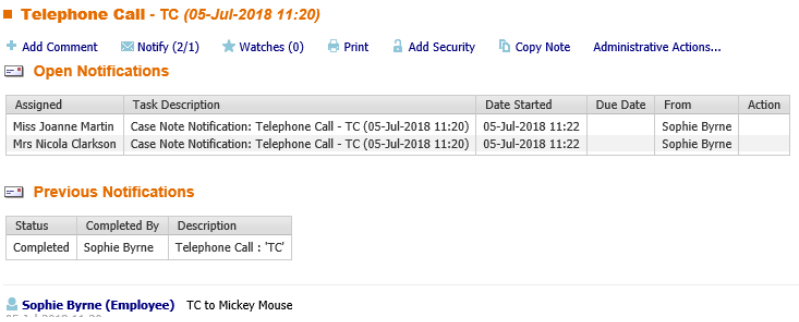
4. Once your case note has been created you will be taken back to the case notes screen. There are multiple options on this screen with what you can do with your case note:



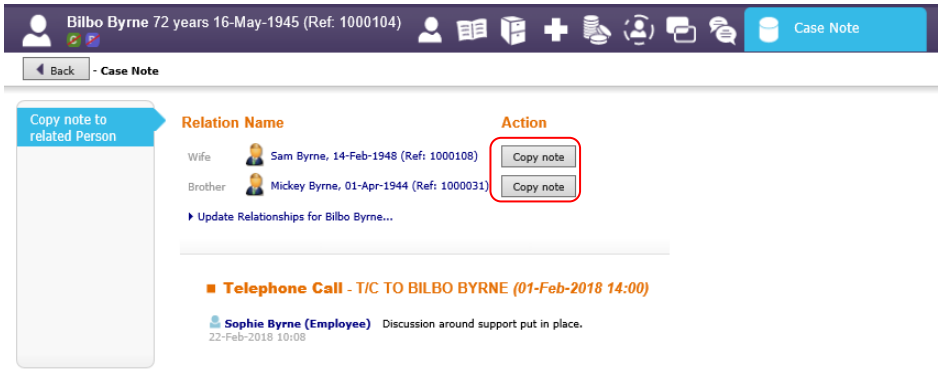
   a. Add Comment – we will not be using this functionality
   b. Notify – this allows you to send an alert to peoples worktrays to make them aware of the case note you have added



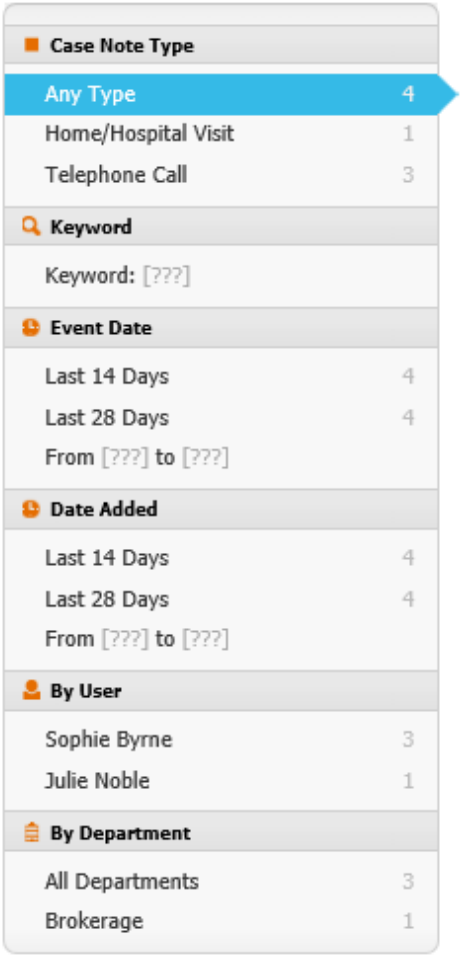
Note: Once you have sent an alert you can track who has acknowledged the alert/case note by clicking on the numbers next to the 'Notify' button. This will display a tables of all those whom still have open notifications (i.e. have not been acknowledged) and all those whom have completed their notification.



c. Watches – we will not be using this functionality
d. Print – this allows you to print out a case note, and/or save a case note as a PDF document
e. Add Security – we will not be using this functionality
f. Copy Note – this allows you to put the case note on to records of those related to the selected client, simply click 'Copy note' next to their name



Case Note Filters



All of the case notes on a record will automatically display, however, you do have the option to filter your case notes using the filters on the left side of the screen.