



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

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.

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.

Liqüidlogic Adults - TRAIN

★ System Notice  
This is the TRAINING instance

User Login ID  
Your User Login ID is how you identify yourself to the system.  
If your password or secret questions have been compromised you should change them immediately. You can do this by logging in and selecting [Account](#) from your user menu on the home page.

Security Check  
The address bar at the top should start with https, identifying a secure page.  
If it does not, or there is no address bar, you may be about to give away your security details.  
DO NOT CONTINUE TO INPUT YOUR DETAILS

Unauthorised Access  
Any unauthorised attempt to access this system will be monitored and may be subject to legal action.

Sign In  
Please enter your Login ID:  
  
OK

Forgotten your login ID?  
[Click for your options...](#)

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

★ System Notice  
This is the TRAINING instance

Password  
**We will never ask you for your complete password when you log in**  
For security, we will NEVER ask you for your complete password when you log in.  
**The characters requested here will not change.**  
If you make a mistake here, this page will continue to ask for the SAME part of your password as before.

Sign In  
Hello **sssoby**  
Please enter the **first, second and eighth** letters of your password:  
 ● ● ● ● ● ● ● ●  
[Forgotten Password?](#)

OK Cancel Reset

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

★ **System Notice**

This is the TRAINING instance

**Your Secret Question**

This is one of your secret questions.

This is third defensive barrier to control access to this system.

You need to type in the answer to the question EXACTLY as you previously entered it when setting up your secret questions.

**Sign In**

Hello **sssoby**

Secret Question: **a**

OK

Cancel

# 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'

Group	Person	Task Description
No Due Date (5)	Mrs Betty Bluebird, 01-May-1944 (Ref: 5)	Draft Adults Support Plan Awaiting Brokerage - Await Brokerage
No Due Date		Draft Adults Support Plan Brokerage - Liquidlogic Day Care
No Due Date	Dr Top Cat, 17-Nov-1920 (Ref: 24)	Draft Adults Support Plan Brokerage - Liquidlogic Day Care
No Due Date	Luke Skywalker, 24-Nov-1977 (Ref: 15)	Draft Adults Support Plan Brokerage - Liquidlogic Day Care
No Due Date		Non Plan Service - Brokerage required
Two Months Ago (3)	Mr Bert Blackbird, 01-Apr-1944 (Ref: 2)	Assessment - Assessment Data: Needs Assessment
16-Oct-2017 09:40		Case
16-Oct-2017 09:40	Mrs Betty Bluebird, 01-May-1944 (Ref: 5)	Case
30-Oct-2017 15:21		
Last Monday (1)	Betty Owl, 01-Jan-1900 (Ref: 27)	Contact Record - Please do Contact Record for Person
04-Dec-2017 15:34		
Today (2)	Mrs Betty Bluebird, 01-May-1944 (Ref: 5)	Contact Record - Please do Contact Record for Person
09:20	Luke Skywalker, 24-Nov-1977 (Ref: 15)	Contact Record - Please do Contact Record for Person
09:31		
Next Week (1)	Betty Owl, 01-Jan-1900 (Ref: 27)	Assessment - Assessment Data: Needs Assessment
14-Dec-2017 11:13		

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:

Group By: **Date** | Task | Person | Priority | Complexity | Pending | Order By: Start Date | Due Date | Assigned Date | Pending Date | Priority | Complexity | Pending: Show | Hide

**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'

Group By: Date | Task | **Person** | Priority | Complexity | Pending | Order By: Start Date | Due Date | Assigned Date | Pending Date | Priority | Complexity | Pending: Show | Hide **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

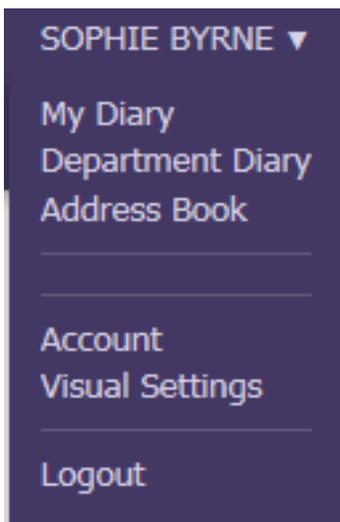
Tells you which version of LAS you are using.

## 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.

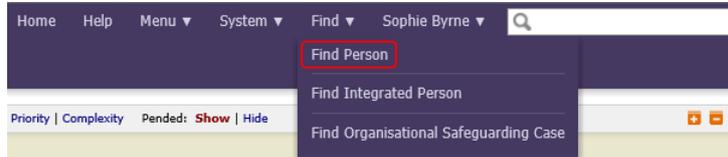
**Logout** allows us to exit the system properly

## 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 not 01/01/50

**Find Person** [Reset] [Search] Query Types: Basic [Default] Advanced

**Name**

Surname

Forename

Preferred Name

Include records that sound similar

**Age / Date of Birth**

Gender

Date of Birth

Age

**Address**

House No. or Name

Street

Town

Post Code

Search Previous Addresses?

**Key Identifiers**

LAS ID

NHS Number

ContrOCC ID

**Other Identifiers**

Identifier

Identifier Type

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

Liquidlogic Adults Home Help Menu System Find Social Worker

**Find Service User** [Back] [Create] [Printable View] Query Types: Basic [Default] Advanced

Maximum result set of 100 returned

Results: [1] [2] [3] [4] [5] (Maximum no of allowed results were found)

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	<a href="#">C</a> <a href="#">SA</a> <a href="#">DOL</a> <a href="#">L</a>	Asylum Seeker		
2	IAS-16	Contact	Assessment	Female	75 years	06-Jun-1940	10 The Street, A Town, The Shire	AA1 1AA	Primary Address	<a href="#">C</a> <a href="#">COL</a> <a href="#">HOSP</a>	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	<a href="#">C</a> <a href="#">SA</a> <a href="#">DOL</a> <a href="#">HOSP</a>	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	<a href="#">C</a> <a href="#">SA</a>	Other Vulnerability	Social Support - Support for Social Isolation / Other	
5	IAS-401	Bary	Bones	Male	55 years	01-Jan-1960	10 Mills Street, Leeds	LS1 1PP	Primary Address	<a href="#">C</a> <a href="#">P</a>	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	<a href="#">C</a>	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	<a href="#">C</a> <a href="#">SA</a>	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	<a href="#">C</a> <a href="#">CARER</a>	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’

The screenshot shows the 'Liquidlogic Adults' search interface. At the top, there is a navigation bar with 'Home', 'Help', 'Menu', 'System', 'Find', and 'Social Worker' options. Below this is a search bar with a magnifying glass icon. The main search area includes a 'Find Service User' button, 'Back', 'Create', and 'Printable View' buttons. The 'Query Types' section has radio buttons for 'Basic', 'Default' (selected), and 'Advanced'. A yellow banner indicates 'Maximum result set of 100 returned'. Below this, the 'Results' section shows a list of page numbers: [1][2][3][4][5], with a note '(Maximum no of allowed results were found)'. The table below has columns for ID, A, Forename, Surname, Gender, Age, Born, Address, Post Code, Type, Links, Service User Group, Primary Long-Term Support Reason, and Primary Short-Term Support Reason.

# Care Relationships

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

**Data Confidentiality Warning**

You do not have a Care Relationship with this Person - To enforce the Person's right to privacy, their details have been withheld from your view.

- If you have a valid reason to access these details you can request the creation of a 'Care Relationship' with the Person by selecting the 'Create Care Relationship' option below. Your request will be processed immediately and, if accepted, you will be given access to the details. You should not make this request unless you have a valid reason to do so (requests will be audited).
- If you do not want to request a Care Relationship then select 'Cancel' at any time to return to the previous screen.

Buttons: Create Care Relationship, Cancel

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**Person's Details**

Title: Simpson  
Surname: Marge  
Forename: Marge  
Date of Birth: 24-Nov-1977

**Professional Involvements**

Role	Professional	Team	Job Title	Start Date	End Date	Contact Number
Case Allocated To	Neil Hammond	Community Early Help - The Wrekin	Senior Early Help Practitioner	22-Feb-2018		

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'

**Data Confidentiality Warning**

You do not have a Care Relationship with this Person - To enforce the Person's right to privacy, their details have been withheld from your view.

- If you have a valid reason to access these details you can request the creation of a 'Care Relationship' with the Person by selecting the 'Create Care Relationship' option below. Your request will be processed immediately and, if accepted, you will be given access to the details. You should not make this request unless you have a valid reason to do so (requests will be audited).
- If you do not want to request a Care Relationship then select 'Cancel' at any time to return to the previous screen.

Buttons: Create Care Relationship, Cancel

---

**Person's Details**

Title: Simpson  
Surname: Marge  
Forename: Marge  
Date of Birth: 24-Nov-1977

**Professional Involvements**

Role	Professional	Team	Job Title	Start Date	End Date	Contact Number
Case Allocated To	Neil Hammond	Community Early Help - The Wrekin	Senior Early Help Practitioner	22-Feb-2018		

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'

**Request a Care Relationship**

You are about to request a new 'Care Relationship' be created between yourself and the Person:

- You are required to record the reason for this request, as well as a short description. If you then choose to Submit your request these details will be audited.
- If you do not want to continue with this request then select 'Cancel' at any time to return to the previous screen.

Buttons: Submit Request, Cancel

Reason: [Dropdown Menu]

Details: [Text Area]

---

**Person's Details**

Title: Simpson  
Surname: Marge  
Forename: Marge  
Date of Birth: 24-Nov-1977

**Professional Involvements**

Role	Professional	Team	Job Title	Start Date	End Date	Contact Number
Case Allocated To	Neil Hammond	Community Early Help - The Wrekin	Senior Early Help Practitioner	22-Feb-2018		



3. Click on 'Lookup Address' to search for an address

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**Personal Details**

Title

**Surname**

Forename

Preferred Name

**Gender**

Ethnicity

Preferred Language

Religion

---

**Key Identifiers**

NHS Number

NI Number

---

**Date of Birth & Age**

Date of Birth

DOB Estimated?

Approximate Age

Date of Death

DOD Estimated?

---

**Contact Information**

Home Phone Number

Primary Contact

Mobile Phone Number

Primary Contact

Email Address

Primary Contact

**Primary Address**

Address

Valid since

---

**Secondary Address**

Address

Valid since

---

**Current Address**

Address

Valid since

---

**Accommodation Details**

Type

Other

Floor

Tenure

Social Housing Provider

Lives Alone

Household Composition

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

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**Gazetteer Type**

Gazetteer Type

---

**Address**

House No / Name

Secondary Name

Organisation

Street

Area

Town / City

County

Post Code

Country

**Help**

Matching addresses are listed below. If the address you require is listed, select it. If not, try repeating your search with more general details.

Warning - maximum no of items was retrieved - please be more specific with your query

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	

- 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'.

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Personal Details

**Personal Details**

Title

**Surname**

Forename

Preferred Name

**Gender**

Ethnicity

Preferred Language

Religion

**Key Identifiers**

NHS Number

NI Number

**Date of Birth & Age**

Date of Birth

DOB Estimated?

Approximate Age

Date of Death

DOD Estimated?

**Contact Information**

Home Phone Number

Primary Contact

Mobile Phone Number

Primary Contact

Email Address

Primary Contact

**Primary Address**

**Address** Derby House Lawn Central  
Telford

**Lookup Address**

Valid since

**Secondary Address**

**Address**    **Lookup Address**

Valid since

**Current Address**

**Address**    **Lookup Address**

Valid since

**Accommodation Details**

Type

Other

Floor

Tenure

Social Housing Provider

Lives Alone

Household Composition

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'

**Personal**

Person

Full Name: Betty Blackbird  
Gender: Female  
Actual DOB: 01-Aug-1944  
Age: 73 years

Marital Status

NHS Number

NHS Number: [Update NHS Number]

Identifiers

Person ID: 4000008  
ContrOCC ID: A4000008

Other Identifiers

Actions

- Update Details
- Remove Person
- Mark this Record as a Duplicate
- View/Update Aliases**
- Copy to Briefcase
- Printable View

Address

Primary Address: 95 High Street, Newport, TF10 7AZ

Contact Methods

Accommodation Details

Accommodation Status

Important Information

- An open Case exists - assigned to Yourself
- Special factor: Alternative Communication Skill
- Safeguarding Enquiry Initiated
- Short-Term Support Reason: Physical Support - Access and Mobility Only
- Consent to Information Sharing: Consent to Information Sharing is Granted

Alerts

- NHS Number not specified
- DOLS Outcome (Standard)

Consent to Information Sharing

Started on: 31-May-2018 12:43  
Consent type: Consent to Information Sharing is Granted

Contact & Case

- Create a new Contact
- Request a Pre-Service Financial Assessment

2. Click on 'Add a New Alias'

## List of Aliases

No aliases have been recorded

[Add a new Alias](#)

[Back to Full Details View](#)

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

Create Cancel - Create New Alias

Alias Type: [Dropdown]  
Title: [Dropdown]  
Forename: [Text Field]  
Surname: [Text Field]

Dates & Validity

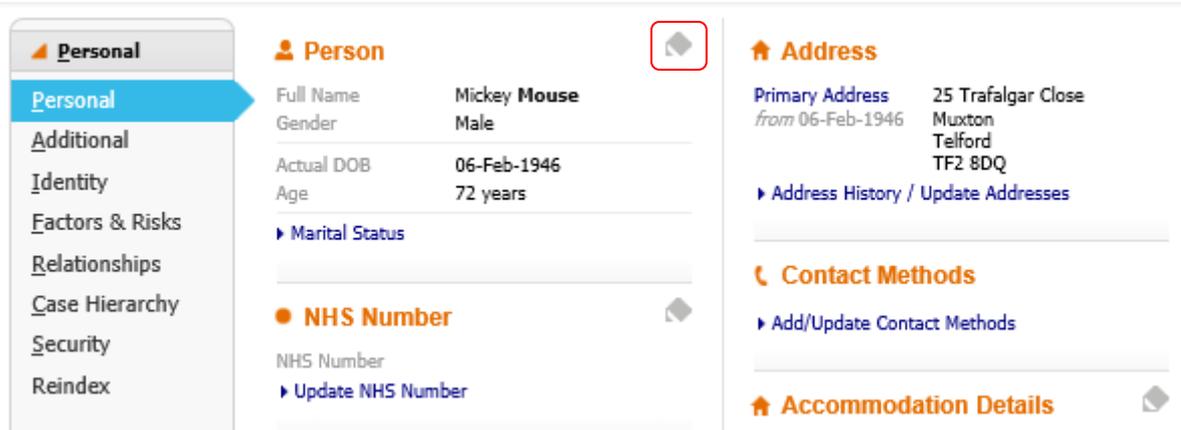
Started On: 06-Jul-2018 14:41 [Calendar Icon]  
Ended On: [Text Field] [Calendar Icon]  
Notes: [Text Area]

Is this alias invalid?

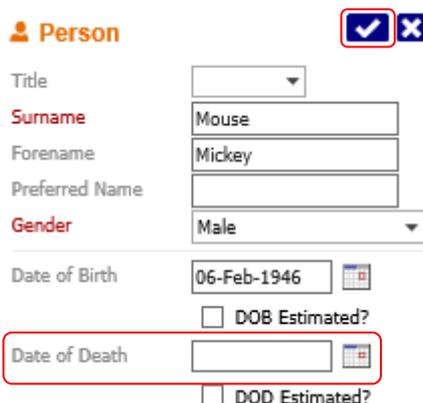
- Gender
- DOB/Age and DOD

### 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'

**Person**

Full Name: Mickey Byrne  
 Preferred Name: Bobby  
 Gender: Male  
 Actual DOB: 01-Apr-1944  
 Age: 73 years  
 Marital Status: Married

**NHS Number**

NHS Number  
 Update NHS Number

**Identifiers**

Person ID: 1000031  
 ContrOCC ID: A1000031  
 Other Identifiers

**Actions**

- Update Details
- Remove Person
- Mark this Record as a Duplicate
- View/Update Aliases
- Copy to Briefcase
- Printable View

**Address**

Primary Address: 15 Greenwood Drive  
 from 01-Apr-1944  
 Telford  
 TFS 0PH  
 Address History / Update Addresses

**Contact Methods**

Home: 0195245785  
 Mobile: 0784523125  
 Add/Update Contact Methods

**Accommodation Details**

Type  
 Other  
 Floor  
 Tenure  
 Social Housing  
 Provider  
 Lives Alone  
 Household  
 Composition

**Accommodation Status**

Accommodation Status

**Important Information**

- An open Case exists - assigned to Yourself
- Carer: Minnie Byrne (Main Carer)
- Special factor: Communication Device
- Long-Term Support Reason: Physical Support - Personal Care Support
- General Practitioner: Mrs Sarah Johnson

**Alerts**

NHS Number not specified

**Consent to Information Sharing**

Started on: 12-Feb-2018 14:00  
 Consent type: Consent to Information Sharing is Granted  
 Update Consent to Information Sharing

**Contact & Case**

- Create a new Contact
- This Person has been registered with ContrOCC
- Request a Pre-Service Financial Assessment

## 2. Click on 'Add New Address'

**Address Information**

Type: Primary Address  
 Address: 15 Greenwood Drive  
 Telford  
 TFS 0PH

**Effective Date**

From: 01-Apr-1944  
 To: [ ]  
 Dates Estimated?  
 Was this address invalid (e.g. entered by mistake)?  
 This address is confidential  
 This address is temporary  
 Update this Address...  
 Add New Address  
 Administrative Actions

**Address History**

Type	From	To	Address	Area	Town	County	Post Code	Country	Confidential	Temporary
Primary Address	01-Apr-1944		15 Greenwood Drive		Telford		TFS 0PH		No	No

## 3. Click on 'Lookup Address'

**Address Information**

Type: [ ]  
 Address: Please search for an address...  
 Lookup Address

**More Details**

Flat No: [ ]  
 Floor: [ ]  
 Room: [ ]  
 Notes: [ ]

**Effective Date**

From: 26-Feb-2018  
 To: [ ]  
 Dates Estimated?  
 Was this address invalid (e.g. entered by mistake)?  
 This address is confidential  
 This address is temporary

**Address History**

Type	From	To	Address	Area	Town	County	Post Code	Country	Confidential	Temporary
Primary Address	01-Apr-1944		15 Greenwood Drive		Telford		TFS 0PH		No	No

## 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 Byrne years the address when a client has died, search for the address by typing 'deceased' in the Street field

**Gazetteer / Address Lookup ...**

**Address**

House No / Name:   
 Secondary Name:   
 Organisation:   
 Street:    
 Area:   
 Town / City:   
 County:   
 Post Code:   
 Country:

**Help**

Locating or changing an address

You can search for a known address by entering details in this form and selecting 'Search for Address'. Use house number and postcode if possible since this will often uniquely identify an address. The example below shows how such queries should be entered.

House No / Name: 23  
Postcode: LS12 3AR

If you don't have a postcode, try using street and town instead.

House No / Name: 23  
Street: Northern Road  
Town/City: London

If you are unable to find the address, complete the details in the form and select 'New Address'. Should you need to remove an existing address, select 'Clear Address'.

5. From the search results, select the correct address

**Gazetteer / Address Lookup ...**

**Address**

House No / Name:   
 Secondary Name:   
 Organisation:   
 Street:    
 Area:   
 Town / City:   
 County:   
 Post Code:   
 Country:

**Help**

Matching addresses are listed below. If the address you require is listed, select it. If not, try repeating your search with more general details.

Address	Town	County	PostCode	Country
65 Trench Road, Trench	Telford		TF2 6PF	

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

Mickey Byrne 73 years 01-Apr-1944 (Ref: 1000031)

**Add Address**

**Address Information**

Type:   
 Address: 65 Trench Road  
 Trench  
 Telford  
 TF2 6PF

**More Details**

Flat No:   
 Floor:   
 Room:   
 Notes:

**Effective Date**

From:   
 To:   
 Dates Estimated?  
 Was this address invalid (e.g. entered by mistake)?  
 This address is confidential  
 This address is temporary

**Address History**

Type	From	To	Address	Area	Town	County	Post Code	Country	Confidential	Temporary
Primary Address	01-Apr-1944		15 Greenwood Drive		Telford		TF5 0PH		No	No

7. The new address has been added.

**Note:** The previous address will automatically be given an end date (Primary Address only)

**Address Information**

Type: Primary Address  
Address: 65 Trench Road, Trench, Telford, TF2 6PF

**Effective Date**

From: 26-Feb-2018  
To: [ ] Dates Estimated?  
[ ] Was this address invalid (e.g. entered by mistake)?  
[ ] This address is confidential  
[ ] This address is temporary  
Update this Address...  
Add New Address  
Administrative Actions

**Contact Methods**

Add Contact Method

**Address History**

Type	From	To	Address	Area	Town	County	Post Code	Country	Confidential	Temporary
Primary Address	26-Feb-2018		65 Trench Road	Trench	Telford		TF2 6PF		No	No
Primary Address	01-Apr-1944	26-Feb-2018	15 Greenwood Drive		Telford		TF5 0PH		No	No

- 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’

**Personal**

Full Name: White Board  
Gender: Male  
Actual DOB: 08-Apr-1950  
Age: 68 years

**NHS Number**

NHS Number  
Update NHS Number

**Identifiers**

Person ID: 4000253  
ContrOCC ID: A4000253  
Other Identifiers

**Actions**

Update Details  
Remove Person  
Mark this Record as a Duplicate  
View/Update Aliases  
Copy to Briefcase  
Printable View

**Address**

Primary Address from 08-Apr-1950: 12 Holborn Crescent, Priorslee, Telford, TF2 9FD  
Address History / Update Addresses

**Contact Methods**

Add/Update Contact Methods

**Accommodation Details**

Type: Other  
Floor:  
Tenure:  
Social Housing Provider:  
Lives Alone  
Household Composition:

**Accommodation Status**

Accommodation Status

**Important Information**

- An open Case exists - assigned to Yourself + More...
- Long-Term Support Reason: Physical Support - Access and Mobility Only
- Consent to Information Sharing is not recorded

**Alerts**

NHS Number not specified

**Consent to Information Sharing**

None Recorded  
Update Consent to Information Sharing

**Contact & Case**

Create a new Contact  
This Person has been registered with ContrOCC  
Request a Pre-Service Financial Assessment

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

White Board 68 years 08-Apr-1950 (Ref. 4000253)

Maintain History [Save] [Cancel] [Save and Close]

**Consent to Information Sharing**

**Details**

Consent  Consent to Information Sharing is Granted  
 Consent to Information Sharing is NOT Granted  
 Consent to Information Sharing is Granted but with limitations  
 Unable to Consent  
 **None Recorded**

Notes

**Privacy Notice under the General Data Protection Regulations 2018:**  
 Telford & Wrekin Council are collecting Personal Identifiable Information to enable the best possible advice, care or support to be provided and to meet the statutory requirements under the Care Act 2014, wider Legislation and Article 9(2)(c) & (h) of the General Data Protection Regulations 2018 or equivalent United Kingdom Legislation.  
 Telford & Wrekin Council will not share any Personal Identifiable Information collected with external organisations unless required to do so by law.  
 However, there may be occasions where we request further information from key third party organisations such as Health or Provider organisations.  
 For further details on the council's privacy arrangements please view the privacy page on the council's website page.

**Audit**

Last Updated By  
 Date Updated

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

- Info re any Open Contacts

### Additional

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

### Identity

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

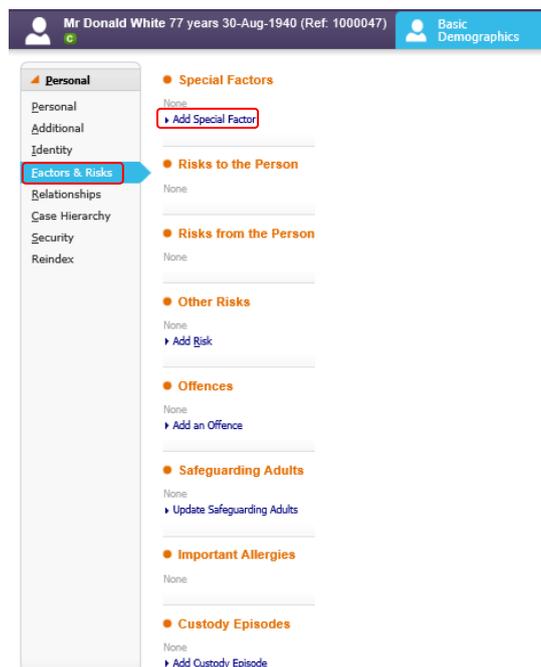
## Factors & Risks

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'

---

● **Details**

Special Factor Group: Information And Commination Need  
 Special Factor Category: Accessible Information - Communication Support  
 Special Factor Type: Communication Device  
 Notes:   
 Date Started: 28-May-2018 18:14  
 Date Ended:

**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.

### ● Special Factors

Migrated - MEMORY ( Since 10-Mar-2011 )

▶ Add Special Factor

**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

### Relationships

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

The screenshot shows a software interface for a client record. At the top, the client is identified as 'Mrs Betty Bluebird 73 years 01-May-1944 (Ref: 5)'. Below this, there are tabs for 'Personal' and 'Basic Demographics'. The 'Personal' tab is selected, and a sub-menu on the left shows 'Relationships' highlighted. The main area displays a table of relationships under the heading 'Family & Other Relationships'.

Flags	Relationship	Name	Age	Gender	Alerts	Contact	Start Date	End Date
	2 The Street, A Town, The Shire, AA1 1AA							
	Self	Betty Bluebird	73 years	Female	📧 📞			
	4 The Street, A Town, The Shire, AA1 1AA							
	Family Friend	Betty Owl	117 years	Female	📧		01-Dec-2017	

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

Mrs Betty Bluebird 73 years 01-May-1944 (Ref: 5) Basic Demographics

Save Reset Close

Relationships for Bluebird, Betty (73 years)

MC	NK	EC	DP	NR	IC	KH	HM	AD	PA	IN	FA	Defined Relationships	Name	Age/Gender	Address	Start/End Date	
<input type="checkbox"/>	Family Friend	Betty Owl	117 years Female	4 The Street, A Town, AA1 1AA	01-Dec-2017	Update											

3. When you have searched to find the record, or have identified the record from those suggested, you will need to:

- Select the type of relation the person is from the drop down list
- 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)
- Enter a Start Date (if no date is entered, it will populate with today's date)
- Click on 'Add'
- Click on 'Close'

Mrs Betty Bluebird 73 years 01-May-1944 (Ref: 5) Basic Demographics

Save Reset Close

Relationships for Bluebird, Betty (73 years)

MC	NK	EC	DP	NR	IC	KH	HM	AD	PA	IN	FA	Defined Relationships	Name	Age/Gender	Address	Start/End Date	
<input type="checkbox"/>	Family Friend	Betty Owl	117 years Female	4 The Street, A Town, AA1 1AA	01-Dec-2017	Update											
MC	NK	EC	DP	NR	IC	KH	HM	AD	PA	IN	FA	Searched Relationships	Name	Age/Gender	Address	Start Date	(reset)
<input type="checkbox"/>	▼	Mr Bert Blackbird	73 years Male	10 The Street, A Town, AA1 1AA Home Phone: 01952474747	<input type="text"/>	<input type="button" value="Add"/>											

Please click on the Add Relationship button to add relationships.

**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:

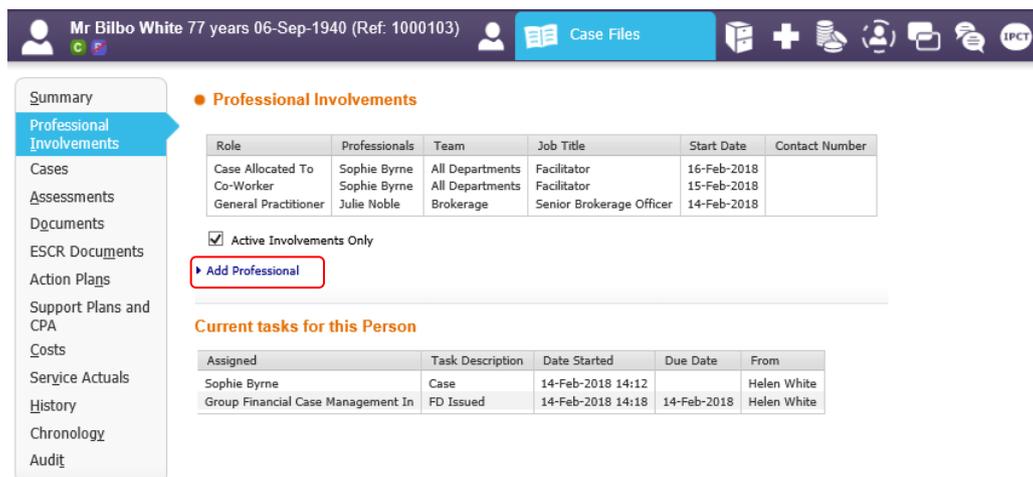
- Details of any recent Contacts
- Details of any recent Cases
- A summary of Assessments
- Combined Client Assessments

## 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'



The screenshot shows the 'Case Files' interface for 'Mr Bilbo White 77 years 06-Sep-1940 (Ref: 1000103)'. The 'Professional Involvements' tab is selected in the left-hand menu. The main content area displays a table of professional involvements:

Role	Professionals	Team	Job Title	Start Date	Contact Number
Case Allocated To	Sophie Byrne	All Departments	Facilitator	16-Feb-2018	
Co-Worker	Sophie Byrne	All Departments	Facilitator	15-Feb-2018	
General Practitioner	Julie Noble	Brokerage	Senior Brokerage Officer	14-Feb-2018	

Below the table, there is a checkbox for 'Active Involvements Only' which is checked, and a red-bordered button labeled 'Add Professional'.

Below the 'Add Professional' button, there is a section for 'Current tasks for this Person' with the following table:

Assigned	Task Description	Date Started	Due Date	From
Sophie Byrne	Case	14-Feb-2018 14:12		Helen White
Group Financial Case Management In	FD Issued	14-Feb-2018 14:18	14-Feb-2018	Helen White

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

- Create New Professional Involvement

---

**● Create New Professional Involvement**

Professional Role

---

**● Select The Professional**

Who is the Involved Professional

---

**● Other Parameters**

Start Date

Comments

**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.

23-Oct-2006

INITASS  
 by Mr Migration Migration - Migration  
 Outcomes: Provide Ongoing Services (Proserv)

### 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

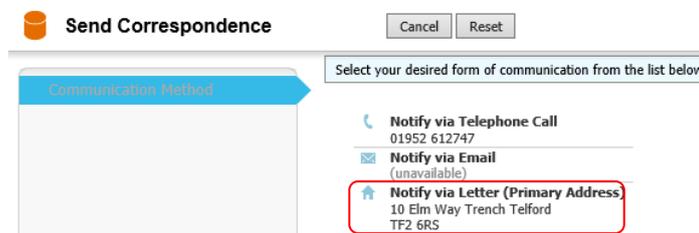
- Details of the location of any archived files
- Generate letters/correspondence

### How to generate Letters (CareLetters):

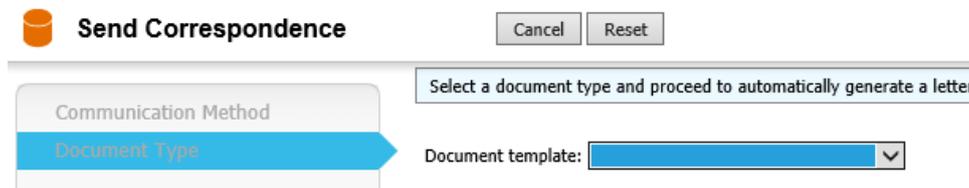
1. From within the Case Files tab, select Documents on the left hand menu. Click on 'Send Correspondence'



2. Click on 'Notify via Letter'

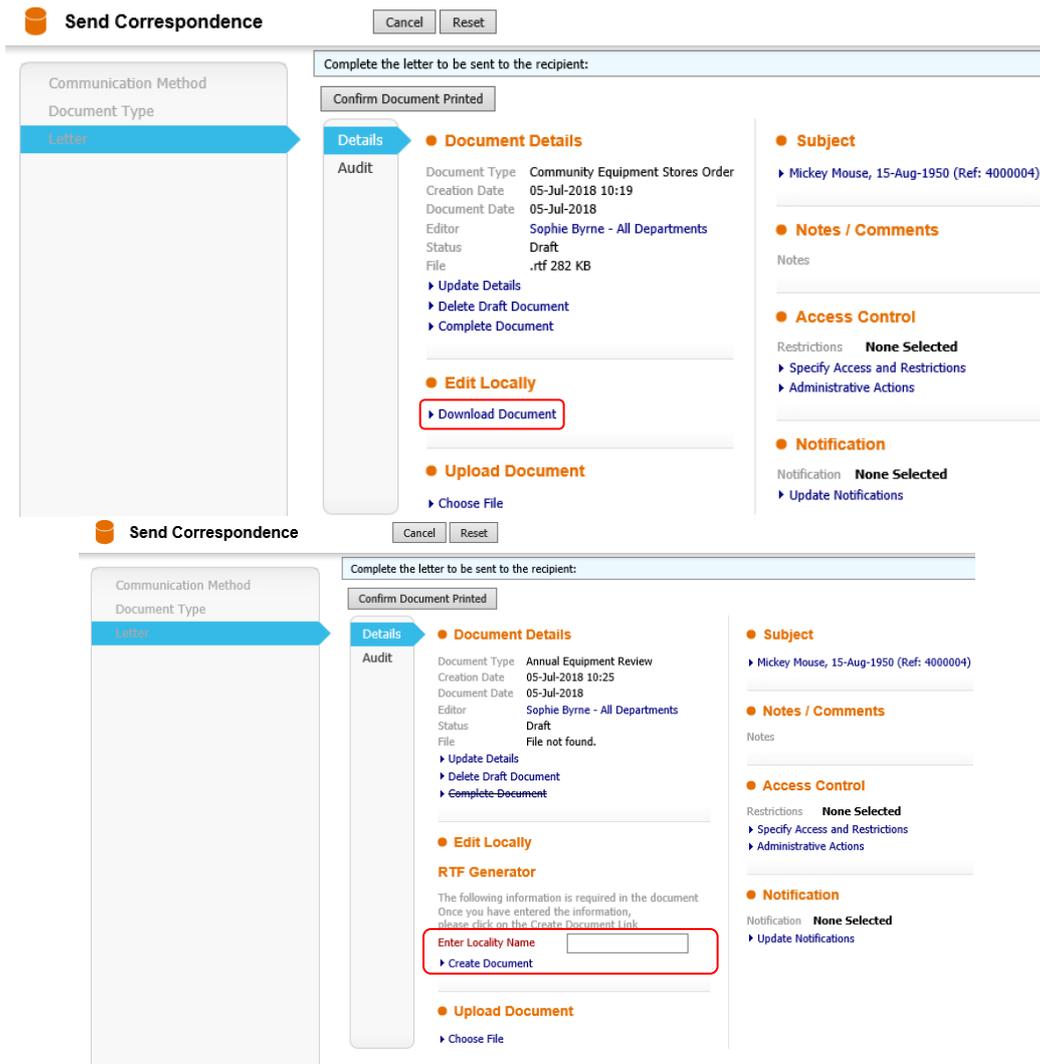


3. Select the letter you wish to send from the picklist



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'.

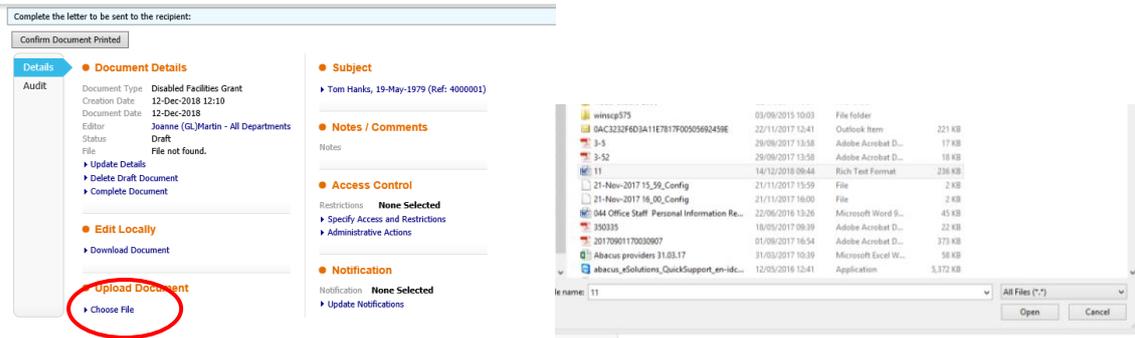
**Note** – If you need to make changes to the template click 'Save and Open' by clicking on the drop down arrow



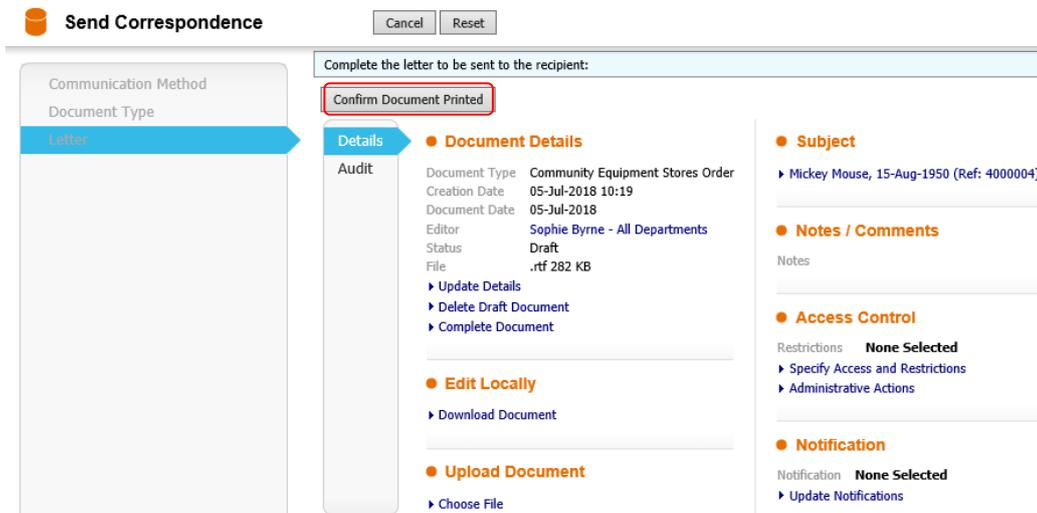
6. The letter will open up in Word; check the information is correct and edit where necessary, click 'Save' to save changes. You can print the letter in the normal way and close the Word document.

**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

### ● Documents

▶ Create/Attach Document

Filter Category:  Filter Type:

Creation Date	Document Date	Category	Type	Status	Editor	Notes	Download
05-Jul-2018 10:19	05-Jul-2018	IAS	Community Equipment Stores Order	Completed	Sophie Byrne - All Departments		<a href="#">Download the document</a>

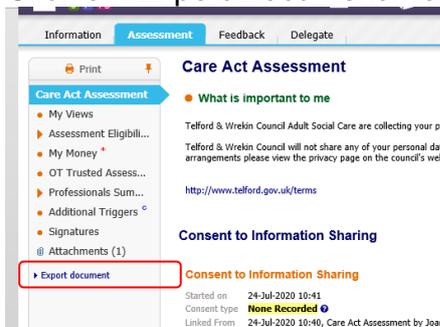
## How to generate a printed version of Assessments and Support Plan

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

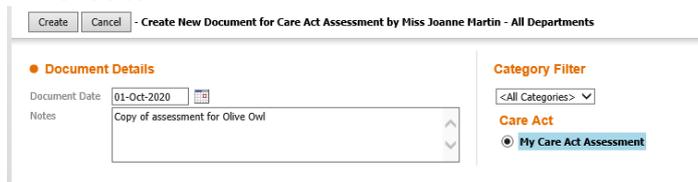
1. From within the Case Files tab, select Assessments on the left hand menu and select the Assessment that you need to produce as a document.



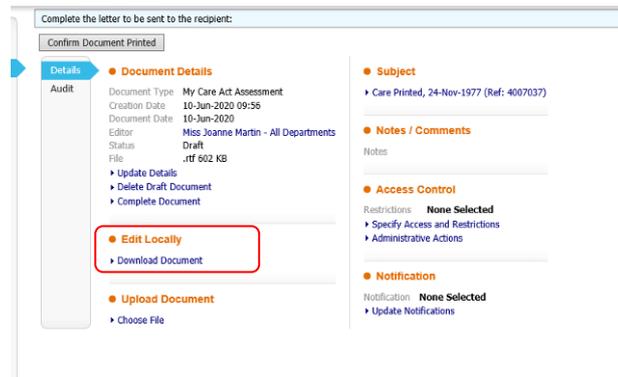
2. Click on 'Export Document' from the left hand menu.



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'

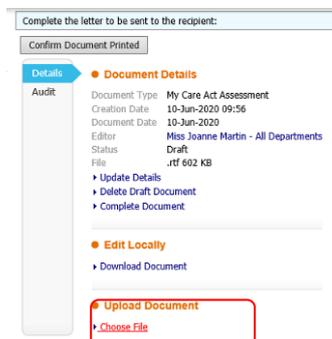


5. A pop message will appear (this may look different depending on how you are accessing LAS), click in the document icon in the bottom left hand corner.
6. The printable version will open in Word and you can make any changes to the document can be made e.g. there maybe sections that are not appropriate 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:

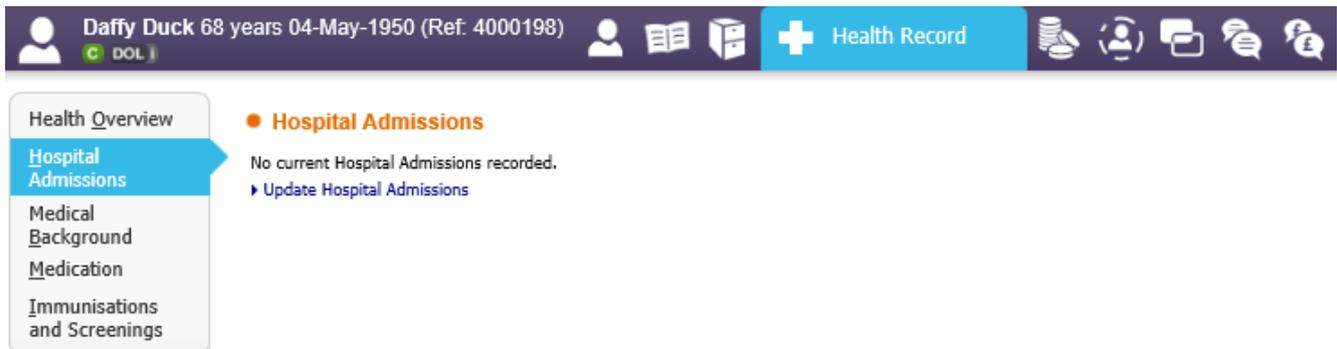
- Recent Hospital Admissions
- Recent Discharge Notifications
- Recent Diagnoses
- Recent Injuries
- Recent Medication

## 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'

The screenshot shows the 'Maintain History' form for a patient named 'Daffy Duck' (68 years, DOB 04-May-1950, Ref: 4000198). The form is divided into several sections:

- Admission Details:** Includes a 'Type' dropdown, a 'Reason' text field, and a 'Discharge No Longer Required' dropdown.
- Admission Dates:** Includes fields for 'Admission Date', 'Expected Discharge Date', and 'Actual Discharge Date', each with a calendar icon. It also has a 'Reason for Discharge' dropdown.
- Hospital:** Includes dropdowns for 'Hospital', 'Ward', and 'Consultant'.
- Additional Information:** Includes a 'Responsible Officer' dropdown with a user icon and a 'Notes' text area.

At the top, there are navigation buttons: 'Save', 'Cancel', and 'Save and Close'. A 'Hospital Admission' button is also visible in the top right.

### 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'

The screenshot shows the 'Medical Background' tab selected in the 'Health Record' form for 'Mickey Mouse' (67 years, DOB 15-Aug-1950, Ref: 4000004). The left sidebar shows navigation options: 'Health Overview', 'Hospital Admissions', 'Medical Background' (selected), 'Medication', 'Immunisations and Screenings'. The main content area lists several categories, each with a 'None' status and an 'Update' button:

- Family History:** No family history specified. Update Family History
- Lifestyle Health Risks:** None. Update Risks
- Disabilities:** None. Update Disabilities
- Disability Registers:** None. Update Disability Registers
- Diagnoses:** None. Update Diagnoses
- Injuries:** None. Update Injuries
- Allergies:** Update Allergies (highlighted with a red box)

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.

**Maintain History** Save Cancel Save and Close

---

+ Create New History

No items to display

**Allergy**

Type

---

**Dates**

Allergy started

Allergy ended

---

**Details**

Details

- Health Conditions

Medication

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

Immunisations and Screenings

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.

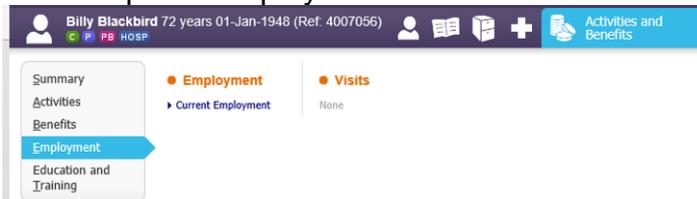
## Benefits

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.

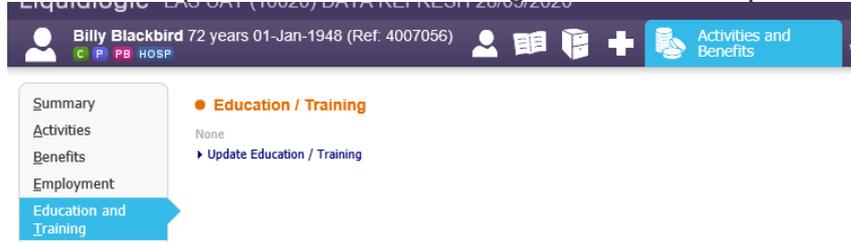
A screenshot of a web application form titled "Maintain History". The form has buttons for "Save", "Cancel", and "Save and Close". On the left, there is a sidebar with "Create-New" and "History" options. The main content area is divided into sections: "Employment Type" with radio buttons for "Employed (Paid)", "Self-Employed (Paid)", "Self-Employed (Unpaid)", "Voluntary (Paid)", "Voluntary (Unpaid)", "Unemployed", and "Retired"; "Started on" and "Ended on" date pickers; "Weekly Hours" with a checkbox for "Less Than Weekly" and a text input field; "Notes" with a text area; "Employment Details" with fields for "Position", "Work Description", and "Main Contact"; and "Employer Details" with a dropdown for "Who is the Employer?".

4. Click 'Save and Close'

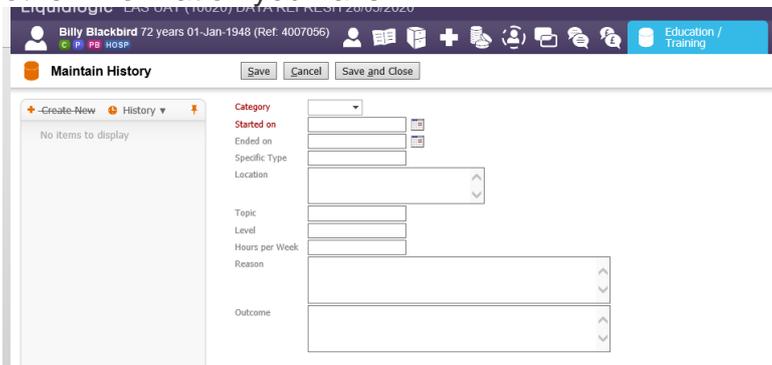
## Education and Training

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

The screenshot shows the Atom interface for 'Mr Bert Blackbird 73 years 01-Apr-1944 (Ref. 2)'. The central diagram shows Bert Blackbird at the center, connected to:
 

- Fifi Jones (CHILD)
- Joanne Martin Senior S. (PROFESSION...)
- Alan Albert (SIBLING)
- Robin Hood (ADOPTIVE C...)

 The 'Flags' key on the right lists:
 

- C (Green circle)
- HOSP (Blue circle)
- MC (Grey vertical bar)
- NK (Grey vertical bar)
- NR (Grey vertical bar)
- P (Blue circle)
- SA (Yellow circle)

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 refocused by left clicking on another person's record and selecting the Refocus ATOM View link.

The pop-up box for Alan Albert displays the following information:
 

- Personal Details:** Case Number 1, Full Name Alan Albert, System(s) LAS, Gender M, DOB 31-May-1987, Age 30 yrs, Sibling of Bert Blackbird, LAS C P.
- Addresses:** Primary (LAS) Derby House Lawn Central, Telford.
- Buttons: Refocus ATOM view, View Demographics, Search & Link across Systems.

# 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



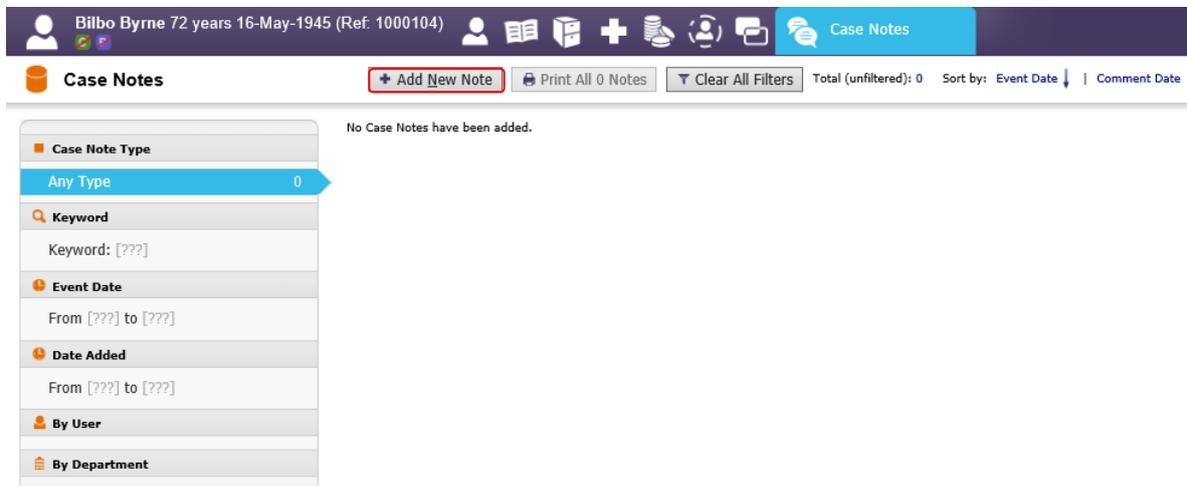
Case notes are short details of contacts made with the Client, GP etc. E.g. telephone calls, emails.

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

Create new Case Note for Bilbo Byrne, 16-May-1945 (Ref: 1000104) ✕

*i* Please enter the Case Note details below.

**Case Note**

Category

Type

Title

Date and Time of Event

Text

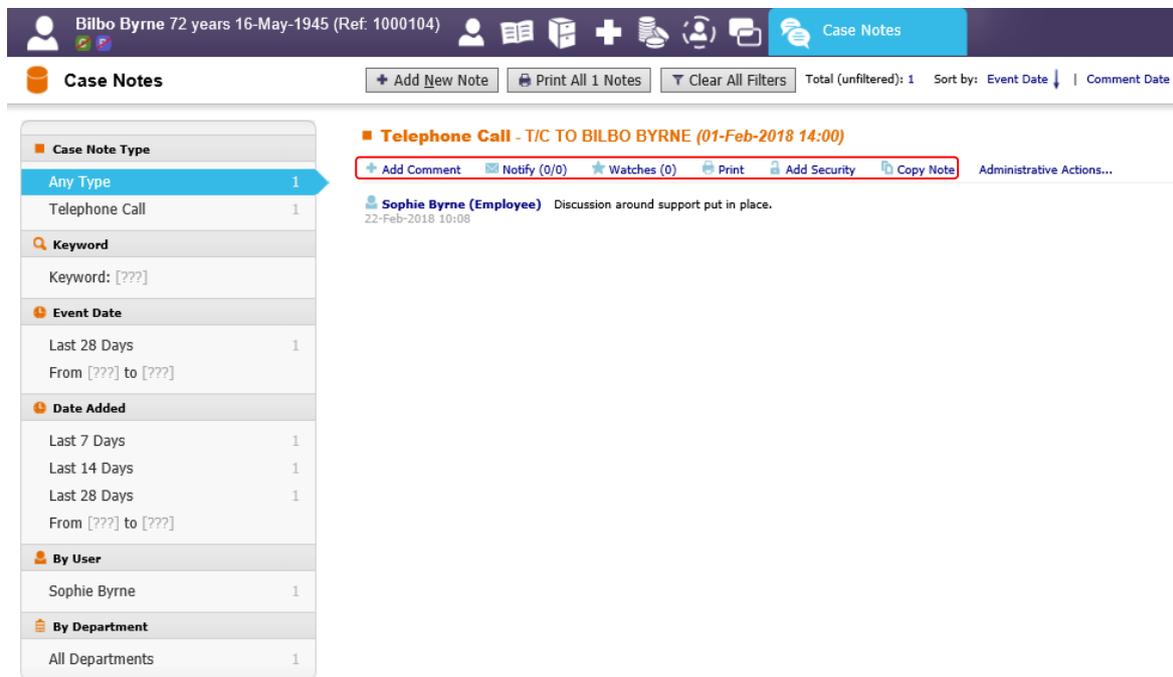
Watch this Case Note

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:



**Case Notes** + Add New Note Print All 1 Notes Clear All Filters Total (unfiltered): 1 Sort by: Event Date | Comment Date

**Case Note Type**

Any Type	1
Telephone Call	1

**Keyword**

Keyword: [???

**Event Date**

Last 28 Days	1
From [???	to [???

**Date Added**

Last 7 Days	1
Last 14 Days	1
Last 28 Days	1
From [???	to [???

**By User**

Sophie Byrne	1
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**By Department**

All Departments	1
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**Telephone Call - T/C TO BILBO BYRNE (01-Feb-2018 14:00)**

+ Add Comment Notify (0/0) Watches (0) Print Add Security Copy Note Administrative Actions...

**Sophie Byrne (Employee)** Discussion around support put in place.  
22-Feb-2018 10:08

- 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

Bilbo Byrne 72 years 16-May-1945 (Ref: 1000104) Case Note

← Back - Case Note

Choose from the existing Professional Involvements below by clicking on the + sign or use the search function to include any other worker, group or department.

● **All Professional Involvements**

	Professional	Current Team	Current Job Title	Role	Contact Number
1 +	Miss Joanne Martin	All Departments	Facilitator and Senior BSS Officer	General Practitioner	

● **Other Professional**

● **Chosen Professionals**

The following professionals will be notified:  
List is empty

● **Notification Task Details**

**Task Priority:**  
 High Priority  Normal Priority  Low Priority  No Priority Given

**Task Complexity:**  
 High Complexity  Normal Complexity  Low Complexity  No Complexity Given

**Comments:**

Cancel Notify chosen professionals

**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.

■ **Telephone Call - TC (05-Jul-2018 11:20)**

+ Add Comment ✉ Notify (2/1) ★ Watches (0) 🖨 Print 🔒 Add Security 📄 Copy Note Administrative Actions...

☰ **Open Notifications**

Assigned	Task Description	Date Started	Due Date	From	Action
Miss Joanne Martin	Case Note Notification: Telephone Call - TC (05-Jul-2018 11:20)	05-Jul-2018 11:22		Sophie Byrne	
Mrs Nicola Clarkson	Case Note Notification: Telephone Call - TC (05-Jul-2018 11:20)	05-Jul-2018 11:22		Sophie Byrne	

☰ **Previous Notifications**

Status	Completed By	Description
Completed	Sophie Byrne	Telephone Call : 'TC'

👤 **Sophie Byrne (Employee)** TC to Mickey Mouse

- 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

Bilbo Byrne 72 years 16-May-1945 (Ref: 1000104) Case Note

← Back - Case Note

Copy note to related Person

Relation Name	Action
Wife  Sam Byrne, 14-Feb-1948 (Ref: 1000108)	<span>Copy note</span>
Brother  Mickey Byrne, 01-Apr-1944 (Ref: 1000031)	<span>Copy note</span>

▶ Update Relationships for Bilbo Byrne...

■ **Telephone Call - T/C TO BILBO BYRNE (01-Feb-2018 14:00)**

**Sophie Byrne (Employee)** Discussion around support put in place.  
22-Feb-2018 10:08

## Case Note Filters

■ Case Note Type	
Any Type	4
Home/Hospital Visit	1
Telephone Call	3

🔍 Keyword	
Keyword: [???	

📅 Event Date	
Last 14 Days	4
Last 28 Days	4
From [???	to [???

📅 Date Added	
Last 14 Days	4
Last 28 Days	4
From [???	to [???

👤 By User	
Sophie Byrne	3
Julie Noble	1

🏢 By Department	
All Departments	3
Brokerage	1

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.