



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.

Liquidlogic 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?

OKCancelReset

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'

The screenshot shows the 'Liquidlogic Adults - TRAIN' Worktray interface. The top navigation bar includes 'Home', 'Help', 'Menu', 'System', 'Find', and 'Joanne Martin'. The sidebar on the left shows 'Worktray' with a count of 12. The main area displays a list of tasks grouped by due date: 'No Due Date' (5 tasks), 'Two Months Ago' (3 tasks), 'Last Monday' (1 task), 'Today' (2 tasks), and 'Next Week' (1 task). Each task entry includes a person's name, reference number, and a task description. The interface also includes a top navigation bar with 'Home', 'Help', 'Menu', 'System', 'Find', and 'Joanne Martin'.

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:

The screenshot shows the top navigation bar of the Worktray interface. It includes sorting options: 'Group By: Date | Task | Person | Priority | Complexity | Pending' and 'Order By: Start Date | Due Date | Assigned Date | Pending Date | Priority | Complexity'. The 'Pended' status is set to 'Show'.

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'

The screenshot shows the top navigation bar of the Worktray interface. It includes sorting options: 'Group By: Date | Task | Person | Priority | Complexity | Pending' and 'Order By: Start Date | Due Date | Assigned Date | Pending Date | Priority | Complexity'. The 'Full Caseload' button is highlighted in red.

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

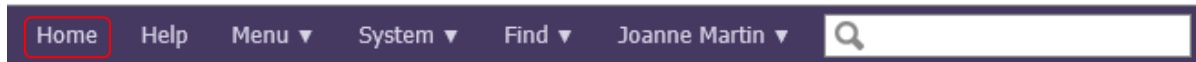
Group Trays

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:

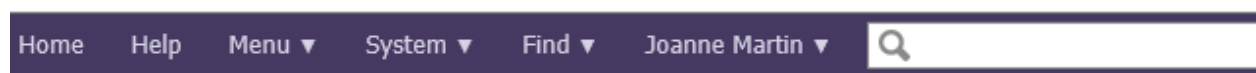
- To get back to your worktray when in other parts of the system, click on 'Home' at the top of the screen



- 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

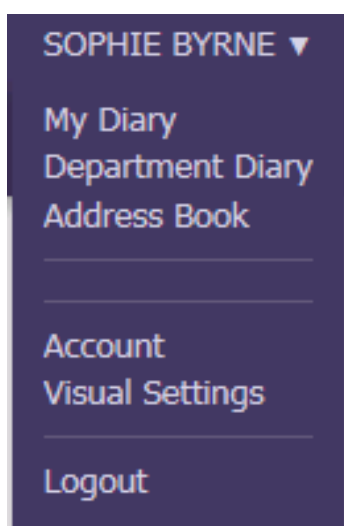
Tells you which version of LAS you are using.

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.

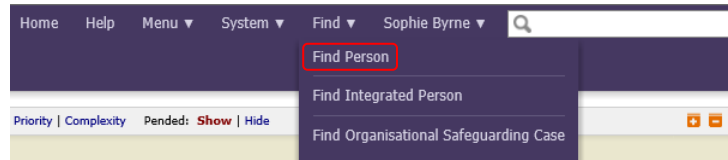
Logout allows us to exit the system properly

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'

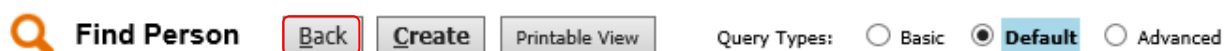


Enter your search criteria and click on 'Search'

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

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													
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	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.

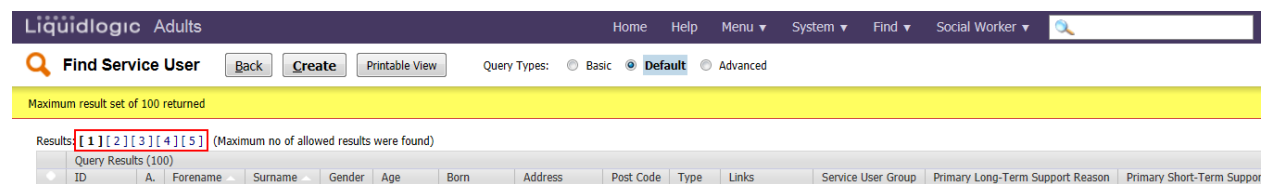
These icons include:

- the  icon to demonstrate there is an active **Case**
- the  icon to highlight an active **Plan**
- the  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’



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
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Care Relationships

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

The screenshot shows a user interface for Marge Simpson (40 years, 24-Nov-1977, Ref: 1000162). At the top, there's a navigation bar with 'Basic Demographics' and various icons. Below this is a yellow warning box titled 'Data Confidentiality Warning'. It states: '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.' It then lists two bullet points: '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).' and 'If you do not want to request a Care Relationship then select 'Cancel' at any time to return to the previous screen.' At the bottom of the warning box are two buttons: 'Create Care Relationship' and 'Cancel'. Below the warning box, there are two sections: 'Person's Details' and 'Professional Involvements'. 'Person's Details' shows Title, Surname (Simpson), Forename (Marge), and Date of Birth (24-Nov-1977). 'Professional Involvements' shows a table with columns: Role, Professional, Team, Job Title, Start Date, End Date, and Contact Number. The table has one row: Case Allocated To, Neil Hammond, Community Early Help - The Wrekin, Senior Early Help Practitioner, 22-Feb-2018, and empty cells for End Date and Contact Number.

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'

This screenshot is identical to the one above, but the 'Create Care Relationship' button in the yellow warning box is highlighted with a red rectangle.

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'

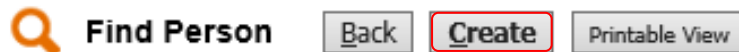
The screenshot shows the 'Request a Care Relationship' screen. At the top, there's a navigation bar with 'Basic Demographics' and various icons. Below this is a yellow box titled 'Request a Care Relationship'. It states: 'You are about to request a new 'Care Relationship' be created between yourself and the Person:'. It then lists two bullet points: '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.' and 'If you do not want to continue with this request then select 'Cancel' at any time to return to the previous screen.' Below the text are two buttons: 'Submit Request' and 'Cancel'. Below the buttons, there are two input fields: 'Reason' (a dropdown menu) and 'Details' (a text area). Below the input fields, there are two sections: 'Person's Details' and 'Professional Involvements'. 'Person's Details' shows Title, Surname (Simpson), Forename (Marge), and Date of Birth (24-Nov-1977). 'Professional Involvements' shows a table with columns: Role, Professional, Team, Job Title, Start Date, End Date, and Contact Number. The table has one row: Case Allocated To, Neil Hammond, Community Early Help - The Wrekin, Senior Early Help Practitioner, 22-Feb-2018, and empty cells for End Date and Contact Number.

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		

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

A screenshot of the 'Create New Record' form. At the top, there is a 'Find Person' search bar with 'Cancel' and 'Create' buttons. The main form is divided into two columns. The left column has a 'Personal Details' tab selected. It contains sections for 'Personal Details' (with fields for Title, Surname, Forename, Preferred Name, Gender, Ethnicity, Preferred Language, and Religion), 'Key Identifiers' (with fields for NHS Number and NI Number), 'Date of Birth & Age' (with fields for Date of Birth, DOB Estimated?, Approximate Age, Date of Death, and DOD Estimated?), and 'Contact Information' (with fields for Home Phone Number, Mobile Phone Number, and Email Address, each with a 'Primary Contact' checkbox). The right column contains sections for 'Primary Address', 'Secondary Address', 'Current Address', and 'Accommodation Details' (with fields for Type, Other, Floor, Tenure, Social Housing Provider, Lives Alone, and Household Composition). Each address section has fields for 'Address' and 'Valid since'.

Find Person

Cancel

Create

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

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

Note: Search using a number of methods e.g. postcode and house number, or house number and street address

Gazetteer Type

Gazetteer Type

Address

House No / Name	<input type="text"/>
Secondary Name	<input type="text"/>
Organisation	<input type="text"/>
Street	<input type="text"/>
Area	<input type="text"/>
Town / City	<input type="text"/>
County	<input type="text"/>
Post Code	<input type="text" value="tf2*"/>
Country	<input type="text"/>


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	

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'.

 **Find Person**

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

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

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

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

Marital Status

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 from 01-Aug-1944: 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
- This Person has been registered with ContrOCC
- 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]
Surname: [Text]

Dates & Validity

Started On: 06-Jul-2018 14:41 [Calendar]
Ended On: [Calendar]
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:

Mickey Mouse, 06-Feb-1946 ■ (Ref: 4000004) Notification of Death

- 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'

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

Personal

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
TF5 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'

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

Back - Primary Address for Mickey Byrne, 01-Apr-1944 (Ref: 1000031)

Address Information
Type: Primary Address
Address: 15 Greenwood Drive
Telford
TF5 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

Contact Methods
Add Contact Method

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

3. Click on 'Lookup Address'

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

Create Cancel - Add 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		TF5 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 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 34R

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:
 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)

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

Primary Address

Back - Primary Address for Mickey Byrne, 01-Apr-1944 (Ref: 1000031)

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](#)

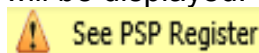
Contact Methods

[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’

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

Basic Demographics

Personal

Personal

Additional

Identity

Factors & Risks

Relationships

Case Hierarchy

Security

Reindex

Person

Full Name: White Board

Gender: Male

Actual DOB: 08-Apr-1950

Age: 68 years

[Marital Status](#)

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: 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

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)

Consent

Maintain History Save Cancel **Save and Close**

+ Create-New Current

No items to display

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'

Mr Donald White 77 years 30-Aug-1940 (Ref: 1000047) Basic Demographics

Factors & Risks

- Special Factors**
None
[Add Special Factor](#)
- Risks to the Person**
None
- Risks from the Person**
None
- Other Risks**
None
[Add Risk](#)
- Offences**
None
[Add an Offence](#)
- Safeguarding Adults**
None
[Update Safeguarding Adults](#)
- Important Allergies**
None
- Custody Episodes**
None
[Add Custody Episode](#)

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

Save Cancel **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 the LAS system interface for a client named Mrs Betty Bluebird. The 'Personal' tab is selected, and the 'Family & Other Relationships' section is visible. The 'Relationships' menu item is highlighted in blue, and the 'Edit Relationships' button is highlighted in red.

Flags	Relationship	Name	Age	Gender	Alerts	Contact	Start Date	End Date
	Self	Betty Bluebird	73 years	Female				
	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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family Friend	Betty Owl	117 years Female	4 The Street, A Town, AA1 1AA	01-Dec-2017	Update

[Search - Search the system for related people](#)
[Suggest - Suggest other relationships based on existing relationships](#)

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'

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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family Friend	Betty Owl	117 years Female	4 The Street, A Town, AA1 1AA	01-Dec-2017	Update
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Searched Relationships					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Mr Bert Blackbird	73 years Male	10 The Street, A Town, AA1 1AA Home Phone: 01952474747		Add

Please click on the Add Relationship button to add relationships.

[Search - Search the system for related people](#)
[Suggest - Suggest other relationships based on existing 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'

Mr Bilbo White 77 years 06-Sep-1940 (Ref: 1000103)

Case Files

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	

☒ Active Involvements Only

[Add Professional](#)

Current tasks for this Person

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

Cancel

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'

The screenshot shows the 'Send Correspondence' interface. On the left, a vertical menu has 'Documents' highlighted in blue. The main area is divided into three sections: 'Standalone Forms Filter' with a 'Filter' input and 'Filter'/'Reset' buttons; 'Draft Forms' with a 'None' status; and 'Actions' with a red-bordered button labeled 'Send Correspondence'. Below 'Actions' is a 'Documents' section with a 'Create/Attach Document' link and the text 'There are no documents.'

2. Click on 'Notify via Letter'

The screenshot shows the 'Send Correspondence' interface with the 'Communication Method' section active. It displays three options: 'Notify via Telephone Call' (01952 612747), 'Notify via Email' (unavailable), and 'Notify via Letter (Primary Address)' (10 Elm Way Trench Telford, TF2 6RS). The 'Notify via Letter' option is highlighted with a red border. The 'Cancel' and 'Reset' buttons are visible at the top right.

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

The screenshot shows the 'Send Correspondence' interface with the 'Document Type' section active. It displays a picklist for selecting a document template. The 'Cancel' and 'Reset' buttons are visible at the top right.

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.

Send Correspondence [Cancel] [Reset]

Communication Method
Document Type
Letter

Complete the letter to be sent to the recipient:
[Confirm Document Printed]

Details

Audit

Document Details

Document Type: Community Equipment Stores Order
Creation Date: 05-Jul-2018 10:19
Document Date: 05-Jul-2018
Editor: Sophie Byrne - All Departments
Status: Draft
File: .rtf 282 KB

▶ Update Details
▶ Delete Draft Document
▶ Complete Document

Edit Locally

▶ **Download Document**

Upload Document

▶ Choose File

Subject

▶ Mickey Mouse, 15-Aug-1950 (Ref: 4000004)

Notes / Comments

Notes

Access Control

Restrictions: **None Selected**
▶ Specify Access and Restrictions
▶ Administrative Actions

Notification

Notification: **None Selected**
▶ Update Notifications

Send Correspondence [Cancel] [Reset]

Communication Method
Document Type
Letter

Complete the letter to be sent to the recipient:
[Confirm Document Printed]

Details

Audit

Document Details

Document Type: Annual Equipment Review
Creation Date: 05-Jul-2018 10:25
Document Date: 05-Jul-2018
Editor: Sophie Byrne - All Departments
Status: Draft
File: File not found.

▶ Update Details
▶ Delete Draft Document
▶ Complete Document

Edit Locally

RTF Generator

The following information is required in the document
Once you have entered the information,
please click on the Create Document Link

Enter Locality Name:

▶ **Create Document**

Upload Document

▶ Choose File

Subject

▶ Mickey Mouse, 15-Aug-1950 (Ref: 4000004)

Notes / Comments

Notes

Access Control

Restrictions: **None Selected**
▶ Specify Access and Restrictions
▶ Administrative Actions

Notification

Notification: **None Selected**
▶ Update Notifications

- 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

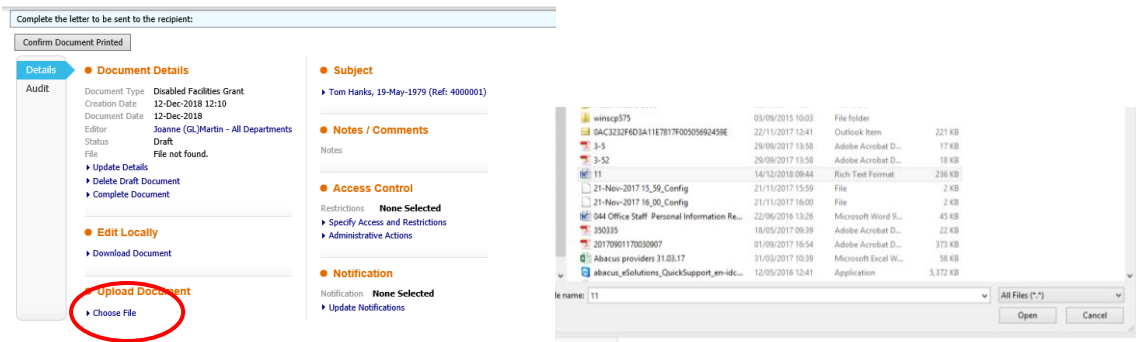
Do you want to open or save 11.rtf (235 KB) from corp-app-179.btw.gov.uk?

[Open] [Save] [Save and open]

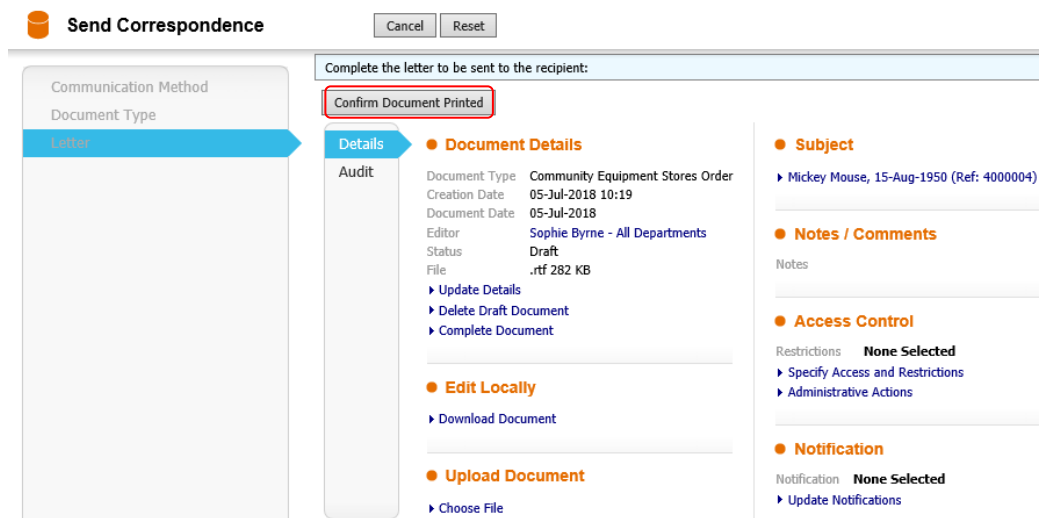
- The letter will open up in Word; check the information is correct and edit where necessary, click 'Save' to save changes. You can print the letter in the normal way and close the Word document.

Note – do not change the file name when saving

- 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

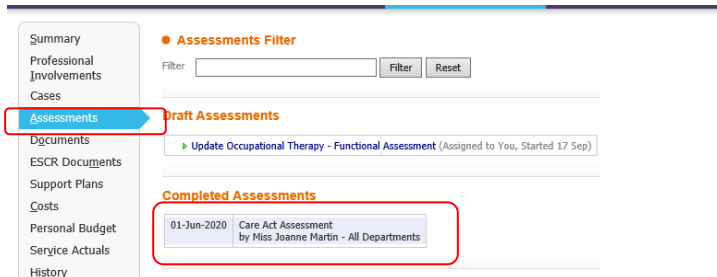
Filter Category: Filter Type:

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		Download the document

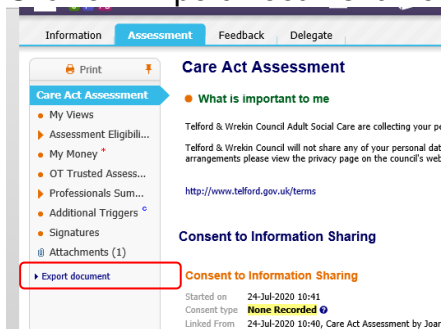
How to generate a printed version of Assessments and Support Plan

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'.

Create Cancel - Create New Document for Care Act Assessment by Miss Joanne Martin - All Departments

Document Date: 01-Oct-2020

Notes: Copy of assessment for Olive Owl

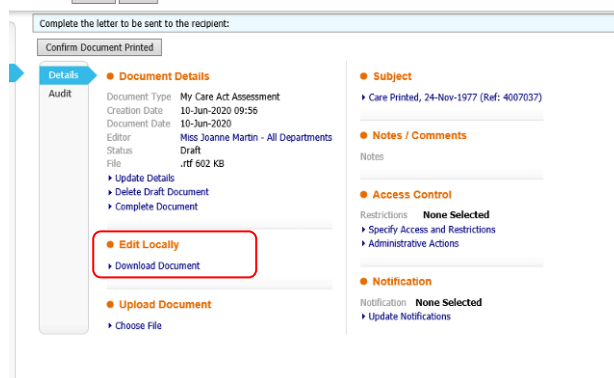
Category Filter

<All Categories>

Care Act

My Care Act Assessment

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.

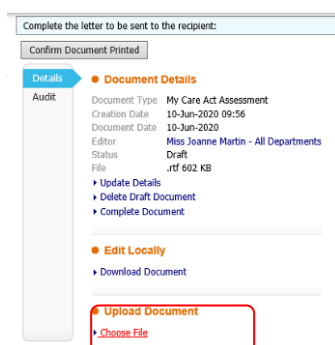
6. The printable version will open in Word and you can make any changes to the document can be made e.g. there maybe sections that are not appropriate to include due to the nature of the situation.

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:

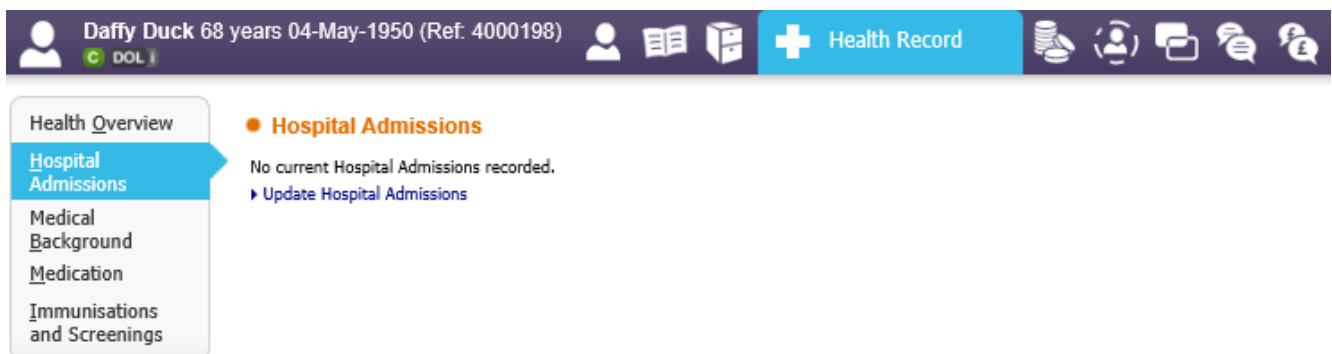
- Recent Hospital Admissions
- Recent Discharge Notifications
- Recent Diagnoses
- Recent Injuries
- Recent Medication

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'

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

Admission Details

Type:
Reason:

Admission Dates

Admission Date:
Expected Discharge Date:
Actual Discharge Date:
Reason for Discharge:

Discharge No Longer Required

Discharge No Longer Required: ☐

Hospital

Hospital:
Ward:
Consultant:

Additional Information

Responsible Officer:
Notes:

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'

Medical Background

Family History
None
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
None
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.


Maintain History

+ Create New
History

No items to display

● Allergy

Type

● Dates

Allergy started
15-Aug-1950

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.

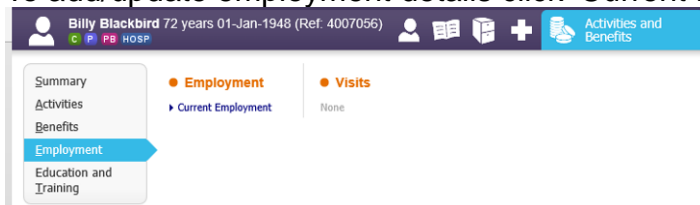
Benefits

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.

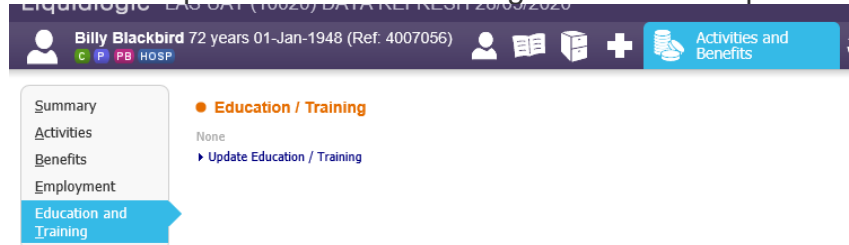
A screenshot of a 'Maintain History' form. The form has a header with 'Maintain History' and buttons for 'Save', 'Cancel', and 'Save and Close'. Below the header, there is a section for 'Employment Type' with radio buttons for 'Employed (Paid)', 'Self-Employed (Paid)', 'Self-Employed (Unpaid)', 'Voluntary (Paid)', 'Voluntary (Unpaid)', 'Unemployed', and 'Retired'. There are input fields for 'Started on', 'Ended on', and 'Weekly Hours'. A checkbox labeled 'Less Than Weekly' is also present, with a note '(e.g. fortnightly, monthly or on some other regular basis)'. Below this is a 'Notes' field. The form also has sections for 'Employment Details' with input fields for 'Position', 'Work Description', and 'Main Contact'. Finally, there is an 'Employer Details' section with a dropdown menu for 'Who is the Employer?'. The form is currently empty, showing 'No items to display'.

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'

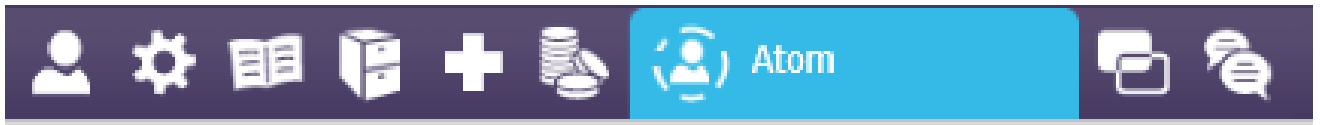


2. Select the type of education from the 'Category', the 'Started date' and any other information you have.

The screenshot shows the 'Education / Training' form. The top bar includes the user profile and navigation icons. The 'Education / Training' tab is selected. Below the navigation bar, a 'Maintain History' section has 'Save', 'Cancel', and 'Save and Close' buttons. The main form area has a 'Create-New' button and a 'History' dropdown. The form fields include: 'Category' (dropdown), 'Started on' (date field), 'Ended on' (date field), 'Specific Type' (text field), 'Location' (text field), 'Topic' (text field), 'Level' (text field), 'Hours per Week' (text field), 'Reason' (text field), and 'Outcome' (text field). The 'History' section shows 'No items to display'.

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 hub is 'Bert Blackbird 73 years'. It is connected to 'Fifi Jones' (CHILD), 'Joanne Martin Senior S...' (PROFESSION...), 'Alan Albert' (SIBLING), and 'Robin Hood' (ADOPTIVE C...). The 'Flags' key on the right lists: C (green circle), HOSP (blue circle), MC (grey circle), NK (grey circle), NR (grey circle), P (purple circle), and SA (yellow circle). The 'Chronological Overview' table on the right shows flags for various dates in 2017.

Flag	Person	From	To
MC	Robin Hood - 43 years	12-Dec-2017	
C	Robin Hood - 43 years	15-Nov-2017	
C	Fifi Jones - 73 years	14-Nov-2017	
C	Fifi Jones - 73 years	14-Nov-2017	
C	Robin Hood - 43 years	13-Nov-2017	
C	Robin Hood - 43 years	03-Nov-2017	
C	Bert Blackbird - 73...	26-Oct-2017	
C	Alan Albert - 30 years	16-Oct-2017	
C	Alan Albert - 30 years	04-Oct-2017	
C	Bert Blackbird - 73...	02-Oct-2017	
C	Bert Blackbird - 73...	03-Apr-2017	

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.

The screenshot shows the Atom interface with a pop-up box for 'Alan Albert'. The central hub is 'Bert Blackbird 73 years'. The pop-up box displays the following details:

- 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
 - Links: 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'

A screenshot of the 'Case Notes' interface. At the top, there's a header bar with a user profile 'Bilbo Byrne 72 years 16-May-1945 (Ref: 1000104)' and a 'Case Notes' button. Below this is a toolbar with buttons: 'Add New Note' (highlighted with a red box), 'Print All 0 Notes', and 'Clear All Filters'. To the right of these buttons, it says 'Total (unfiltered): 0' and 'Sort by: Event Date | Comment Date'. The main area shows a list of filters on the left: 'Case Note Type' (Any Type, 0), 'Keyword' (Keyword: [???]), 'Event Date' (From [???] to [???]), 'Date Added' (From [???] to [???]), 'By User', and 'By Department'. The main content area says 'No Case Notes have been added.'

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

A screenshot of the 'Create new Case Note' form. The title bar says 'Create new Case Note for Bilbo Byrne, 16-May-1945 (Ref: 1000104)'. Below the title bar is a light blue box with an information icon and the text 'Please enter the Case Note details below.' The form has a section titled 'Case Note' with the following fields: 'Category' (a dropdown menu), 'Type' (a dropdown menu with 'Telephone Call' selected), 'Title' (a text field with 'T/C TO BILBO BYRNE'), 'Date and Time of Event' (a date and time picker with '01-Feb-2018 14:00'), and 'Text' (a large text area with 'Discussion around support put in place.'). At the bottom of the form is a checkbox labeled 'Watch this Case Note'. At the very bottom are four buttons: 'Finalise Note', 'Save to Draft', 'Save to Draft and Close', and 'Cancel'.

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:

The screenshot shows a software interface for 'Case Notes'. At the top, a header bar displays the user 'Bilbo Byrne 72 years 16-May-1945 (Ref: 1000104)' and a 'Case Notes' tab. Below the header, a sidebar on the left contains filter sections: 'Case Note Type' (with 'Any Type' selected), 'Keyword' (with a search box), 'Event Date' (with 'Last 28 Days' selected), 'Date Added' (with 'Last 7 Days' selected), 'By User' (with 'Sophie Byrne' selected), and 'By Department' (with 'All Departments' selected). The main area displays a case note titled 'Telephone Call - T/C TO BILBO BYRNE (01-Feb-2018 14:00)'. Above the note text are action buttons: 'Add Comment', 'Notify (0/0)', 'Watches (0)', 'Print', 'Add Security', and 'Copy Note'. The note text itself is: 'Sophie Byrne (Employee) Discussion around support put in place. 22-Feb-2018 10:08'. At the top right of the main area, there are summary statistics: 'Total (unfiltered): 1', 'Sort by: Event Date', and 'Comment Date'.

- 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)

[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)

[Back](#) - Case Note

[Copy note to related Person](#)

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

[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 [???	
Date Added	
Last 14 Days	4
Last 28 Days	4
From [???	
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.