LCS / Case Supervision User Guide

Liquidlogic Children's Systems (LCS)

Author:

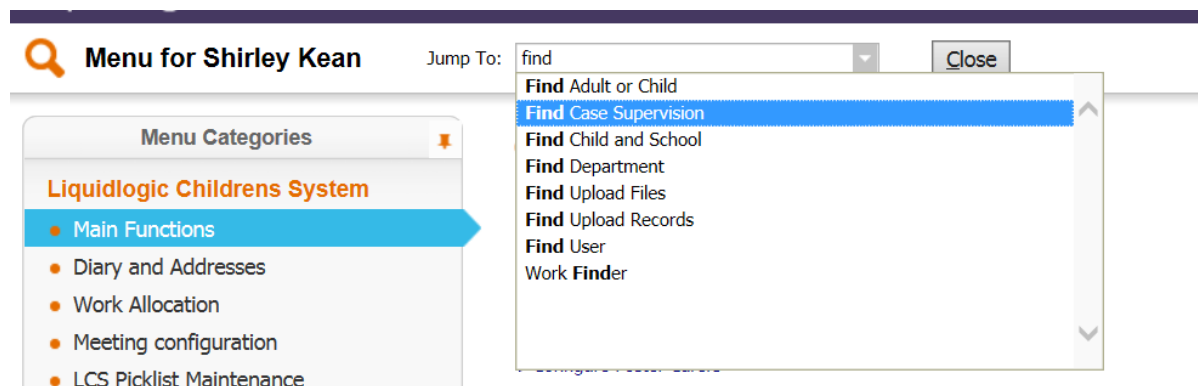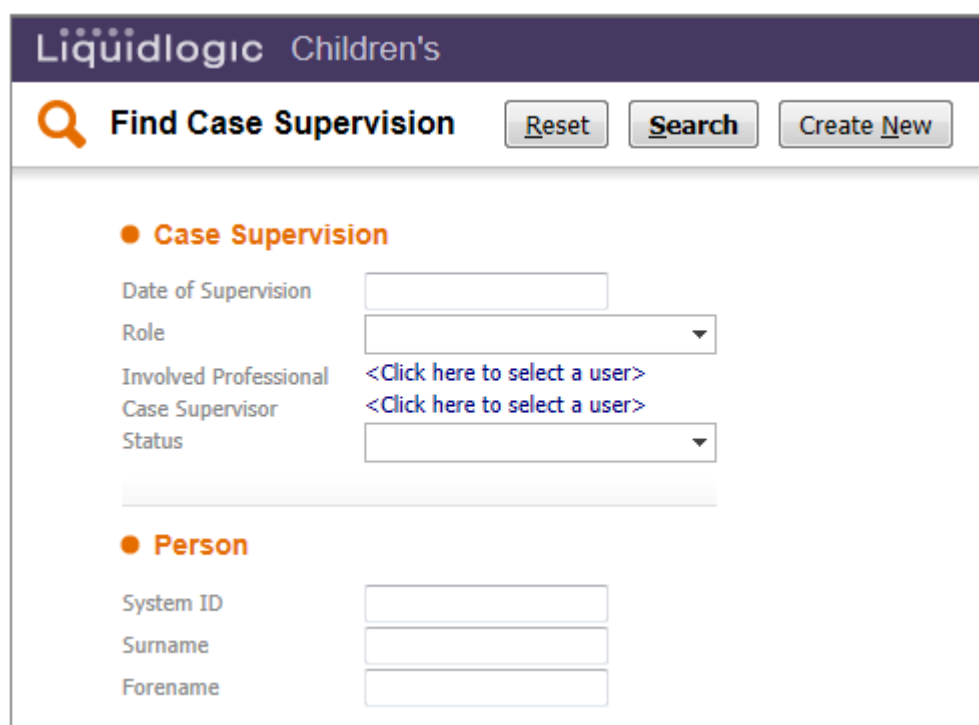Date:

Creating Case Supervision Records

Users with the Case Supervision Profile Right will be able to create a new Case Supervision record by clicking the link **Find Case Supervision** within the *User Maintenance* section of the main **Menu**:

Select the menu option and then using the 'Jump to: box select Case Supervision

Clicking this link will open the screen to search for Case Supervision records. The user can either search for an existing record, or a new Case Supervision record can then be created by clicking the button **Create new** and completing the fields shown below:

Date of Supervision – This is the date of the Supervision.
Role – this is the worker role that will be looked at – for example, if Allocated Social Worker is selected, the search will be for Supervisions where the worker had that role
Involved Professional – This is the worker for whom the Case Supervision is to be created.
Case Supervisor – This is the Case Supervisor who is completing the Case Supervision record.
Status – This allows you to enter in a choice of 3 status: **Active, Completed, Cancelled** when searching for Case Supervisions

Once all the information has been entered in, you can click on **Search**. If, after searching for a Case Supervision, there are no returns to match the criteria, you will get the following message asking you to change the criteria. If after searching, no results are found, click on **Create New**:

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Once the Involved Professional and Role fields have been completed, a list of relevant cases available to create a Case Supervision record for will be displayed. Please note, that this list will display those cases only where the user selected has the Role selected on the child/young person's record.

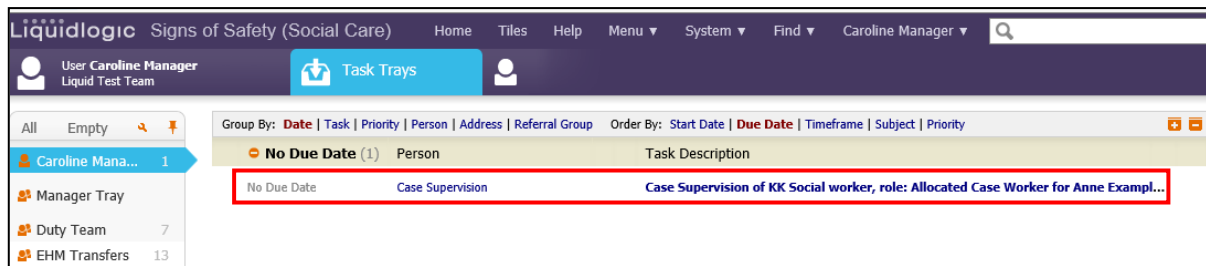**Cases to add** – These are the cases that are to be included in the Case Supervision record.

Cases can be added / removed from the Case Supervision record by selecting the checkboxes against the relevant cases. Once you have selected the Cases you want to add, click on **Create.**

You can choose to create supervision forms for your team members prior to supervision. You can then search for the case supervision during supervision sessions.
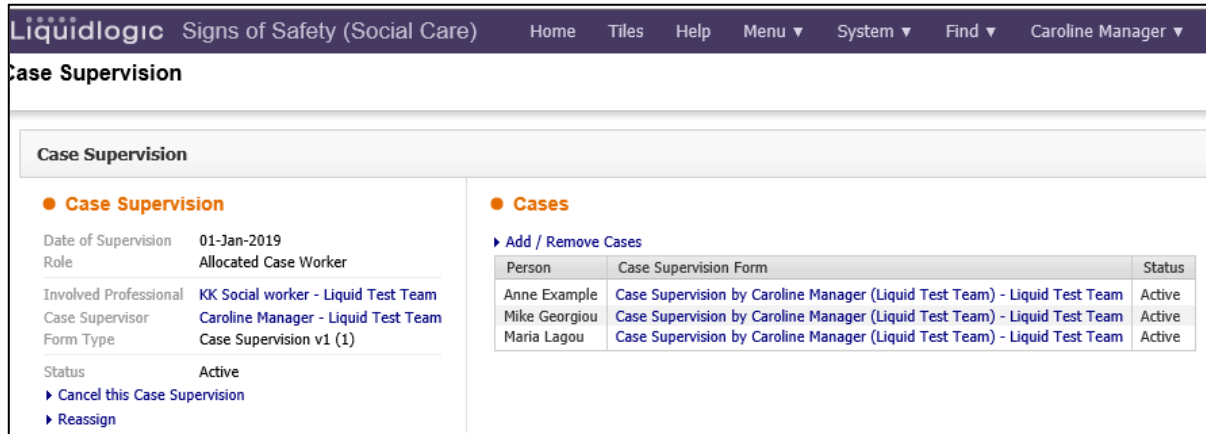
Completing Case Supervision Records

Once a Case Supervision Record has been created, a task for this will be generated in the worktray of the user selected as the Case Supervision.

By Selecting the task, you will be taken to the **Case Supervision** window below.
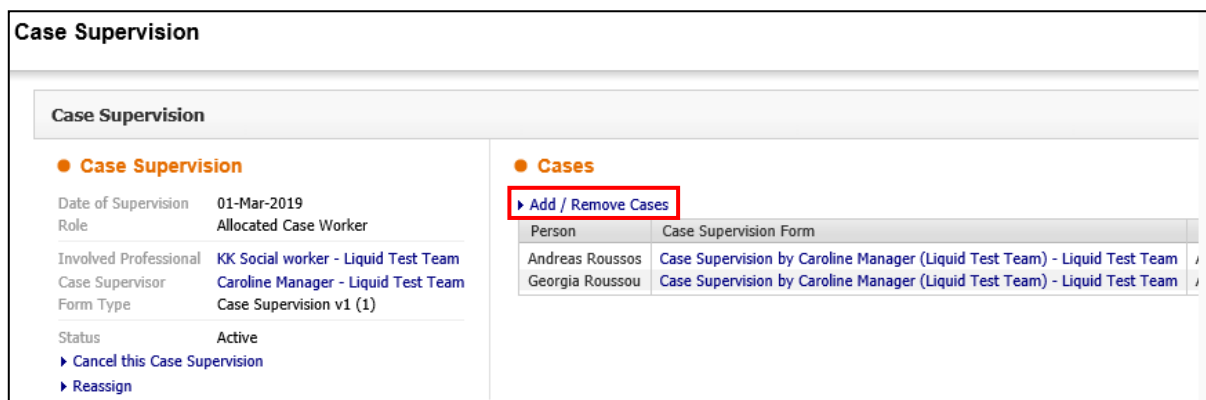
Please note, a single task will be generated for consolidated Case Supervision Records. The task will remain active whilst the Case Supervision Record is in draft and will be removed once the Case Supervision Record has been finalised.

Adding/Removing Cases

At this point cases can still be added / subsequently removed from the Case Supervision Record by clicking the link **Add/Remove cases**.

A list of Cases will appear which you can select to be included in the Case Supervision. Once you have selected the additional cases, click on the **Update** button.

These cases will appear in the list of people you want to include in the Case Supervision.

Consolidating Case Supervision

Please note that cases selected to be included in the Case Supervision Record can only be removed once they have been unconsolidated from the Case Supervision form. This can be done by editing the consolidated form and unticking the relevant child's name on the Consolidation tab and clicking on the *Apply Consolidation* button.

Completing the Case Supervision Record

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When you have consolidated any records, you can **Start** at Case Supervision form. Dependant upon the form that is on the system, you may automatically be taken to a form or you may be given the opportunity to **Start Blank.**

The Case Supervision form can then be completed by clicking on the Case Supervision form hyperlink and completing relevant fields as appropriate.

Recording Information on Individual Service Users

Even though Consolidation of a Case Supervision Record may have taken place, it is possible within the Record to "split" the answers for the individual service users. If you wish to do this, click on the Person Icon at the side of the question and additional fields will be displayed so that different answers can be entered as appropriate.

Once the responses have been entered in, click on **Finalise Case Supervision** to finalise the Case Supervision.

Once the Case Supervision form/s have been finalised, the Case Supervision Record can be completed by clicking on the link **Complete** this Case Supervision.

You will then be asked to confirm that you want to Complete the case. Click on **OK**
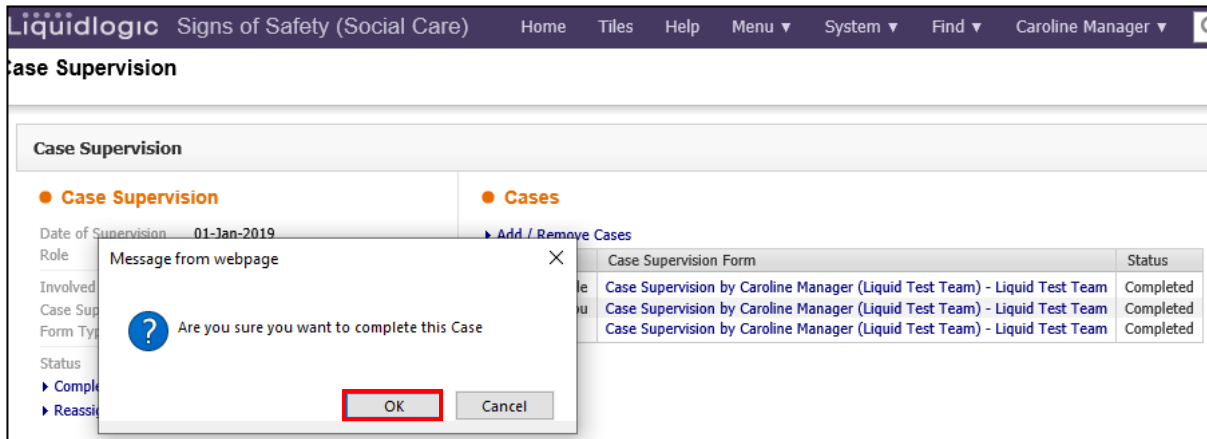
Reassign a Case Supervision

If you need to Reassign a Case Supervision to another member of Staff, this can be done by clicking the **Reassign** button on the Case Supervision Screen.
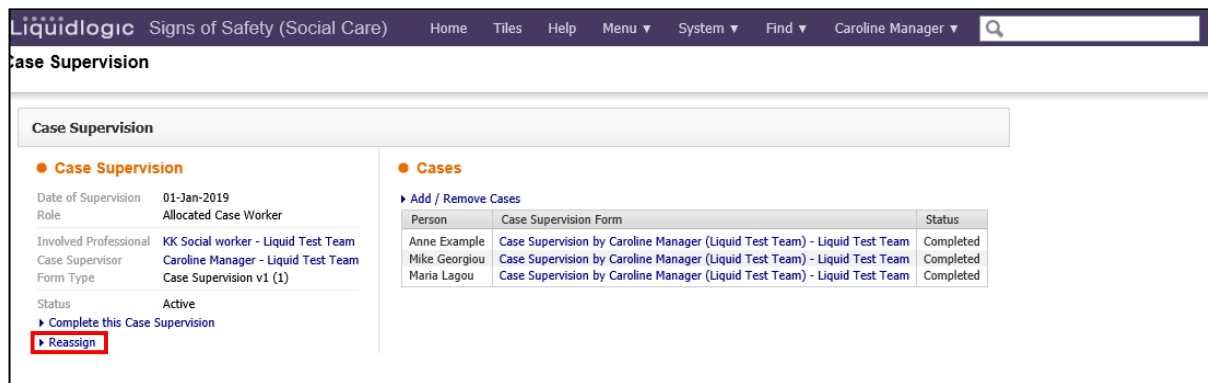
Enter in the details of the Person you wish to reassign the task to. You can also add any comments you feel would be useful. Once you have completed the information, click on **Save**.

Cancelling Case Supervision Records

Once a Case Supervision Record has been created, it is possible to cancel this Record if it does not take place or has been started in error.

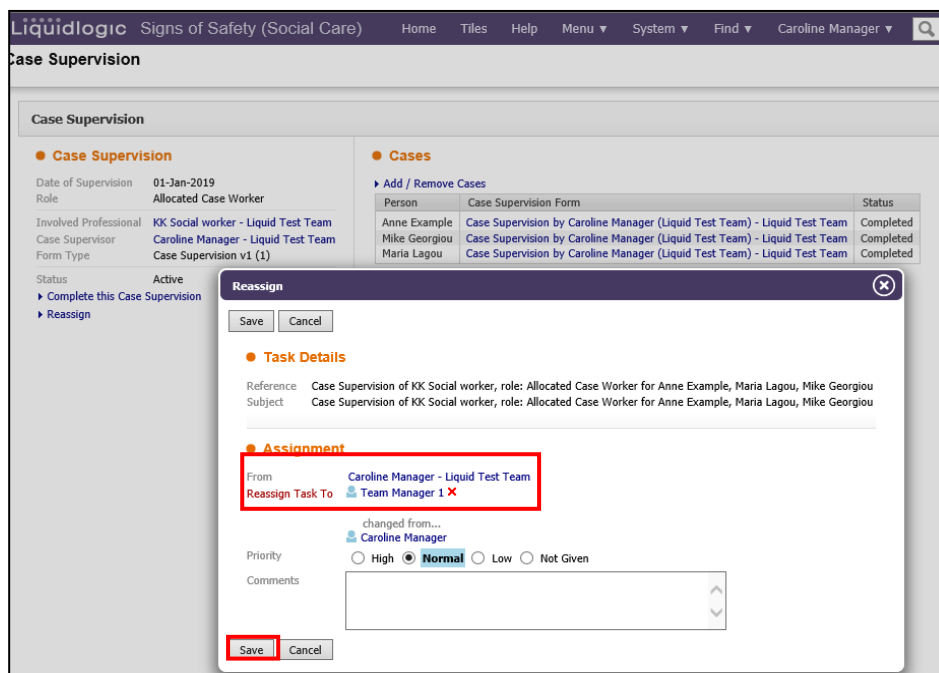**You cannot Cancel a Case Supervision if it has been Completed.**

Once you click on the **Cancel this Case Supervision** button, you will be asked to confirm you want to cancel the case. To do this, click on the **OK** button and the Case Supervision will be cancelled.

Viewing Existing Case Supervision Records

Case Supervision Records can be viewed from within the record of a child/young person with a completed Case Supervision Record, or from the Menu area.

Viewing Case Supervision Records from the Menu

Users with the Case Supervision Profile Right will be able to view Case Supervision records by clicking the link **Find Case Supervision** within the *User Maintenance* section of the main menu:

Clicking this link will open the screen to search for Case Supervision records. Case Supervision records can then be searched for using the fields shown below.

Date of Supervision – I.e., Search for all Case Supervisions on a particular date

Role - I.e., Search for all Case Supervisions completed for a particular role (e.g. Co-worker)

Involved Professional – I.e., Search for all Case Supervisions completed for a particular user

Case Supervisor – I.e., Search for all Case Supervisions completed for a particular Case Supervisor

Status I.e., Search for all Case Supervisions of a particular status (Active/Completed/Cancelled)

System ID – I.e., Search for all Case Supervisions completed on a particular child/young person's record

Surname - I.e., Search for all Case Supervisions completed for a particular user (identified by Surname)

Forename - I.e., Search for all Case Supervisions completed for a particular user (identified by Forename)

Search results will be displayed in a table and can be viewed by clicking on the specific Case Supervision Record in the Results table.

If you leave the **Status** field as blank, all Case Supervisions for a specific Worker, or by a specific Manager, will be displayed as shown below. You can go in and view the appropriate Case Supervision by clicking on the particular item.

If you are, for example, wanting to see only **Cancelled** Case Supervisions, you can do this by selecting the **Cancelled** Status.

This will then display only the Case Supervisions that have been Cancelled, as shown below:

PLEASE NOTE – Users without the Case Supervision Profile Right will also be able to search for Case Supervision Records, but <u>only</u> those Case Supervision Records where they are the Allocated Case Worker/Case Supervisor will be displayed in the Search results.

Viewing Case Supervision Records from a Child/Young Person's Record

Case Supervision can be viewed from within a child/young person's record. Case Supervision forms can be viewed via the Forms tab.

Information regarding Case Supervision forms will also appear in the **History** and **Timeline** tabs if configured to do so.