



LCS / Child Sexual Exploitation Training Manual

Liquidlogic Children's Systems (LCS)

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TABLE OF CONTENTS

1. COURSE OVERVIEW	4
2. WORKTRAY	5
3. SEARCHING	6
4. WILD CARDS	7
5. CREATING A PERSON RECORD	8
6. STARTING AN EPISODE	10
7. CSE TAB.....	10
I. Key Dates	11
II. Category of Risk	11
III. Meetings.....	11
8. FURTHER DETAILS TAB	12
I. Social Care Responses and Outcomes	12
II. Current Living Situation.....	12
III. Health Issues.....	13
IV. Education / Employment / Training	13
9. RISKS / ACTIONS TAB	13
I. Nature of Exploitation.....	13
II. Referral to Other Services	14
III. Other Risk Factors	14
IV. Criminal Justice Issues	14
10. SERVICES TAB	15
I. Service Provisions	15
II. Resource Costs.....	16
11. ALLEGATIONS TAB.....	16
I. Allegations (Location)	16
II. Allegations (Vehicles).....	17
III. Allegations (Telephones/Mobiles)	17
12. FORMS TAB	18
13. CASE NOTES TAB.....	19
I. Creating a Case Note	19

LCS – Child Sexual Exploitation Workspace – User Guide

V.1.1

II.	Finalising / Updating / Printing a Case Note	21
III.	Case Note Report	22
14.	ACCESS TAB	23
15.	AUDIT TAB.....	23
16.	OTHER FUNCTIONALITY - Inclusion of workspace items in History	23
17.	KEYBOARD SHORTCUTS.....	25

1. COURSE OVERVIEW

COURSE OUTCOMES

To enable users to navigate the LCS Child Sexual Exploitation (CSE) Workspace effectively, in accordance with the requirements of the user's job role.

By the end of the ½ day course delegates will be able to:

- **Login to Liquidlogic**
- **Navigate their Home Screen and Manage their Worktrays**
- **Search for a person Record**
- **View the CSE Workspace**
- **Create a person record**
- **Create an CSE Episode**
- **Update a CSE Episode**
- **Add a Stand-alone Form**
- **Add/Finalise/Update/Print and Publish a Case Note**
- **Inclusion/exclusion of workspace items in History**
- **End a CSE Episode**

COURSE PRE-REQUISITES

Users to have attended all mandatory Liquidlogic LCS Mandatory Training courses

2. WORKTRAY

Your worktray holds tasks that are allocated to you. The 3 main areas of the worktray are:

- **Due Date** – Relates to the date by which the tasks should be completed
- **Person** – displays Name and Age of person and coloured flags
- **Task Description** – type of tasks to be done

The dates in the work tray are colour coded:

- **Blue** - tasks due today
- **Green** – task due tomorrow
- **Red** – tasks are overdue
- **Black** - tasks that are due in the future (after tomorrow)

NB: If you hover your mouse over the due date of the task, the number of days in which the task is to be completed or is overdue will be displayed

The system defaults the order of the worktray by Date, however there are different ways you can order your worktray

- Group by: **Date, Task, Person, Address** or **Referral Group** and/or
- Order by: **Start Date, Due Date, Timeframe** or **Person**

If your worktray is grouped by **Person** or **Address** you have the option of **Show Full Caseload**

Use the **Show Full Caseload** option to display everyone with whom you have an involvement with current tasks open

Depending on your profile you may have access to one or more group work trays. If you have they will be displayed on the left hand side of your screen

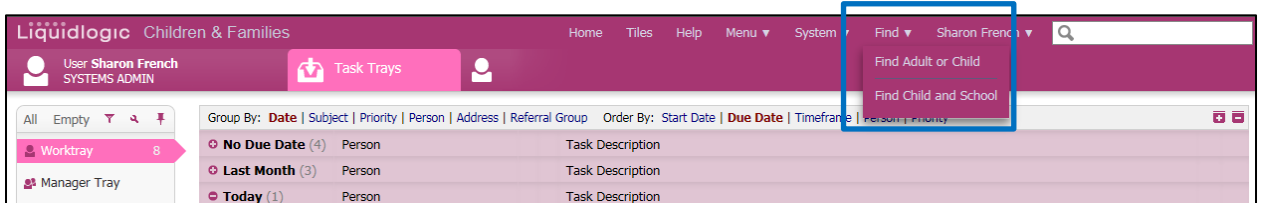
To work on any task in the group worktray, the task has to be **'picked up'** first. If a worker picks up a task from a group worktray, the task will then be assigned to them and will appear in their worktray.

If you just want to view the task, click on the **task description** and not **pickup**

3. SEARCHING

To search for a person record held in the LCS system:

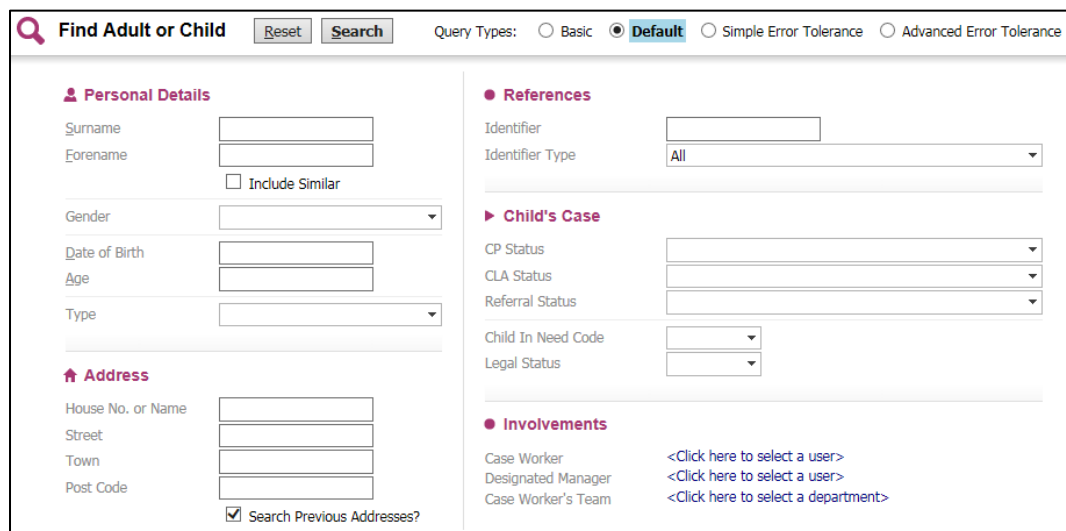
- Select **Find Adult or Child** from the **Find** drop down menu on the toolbar at the top of the screen



Within the search screen there are a number of different search fields that can be used. Do not put data into every field – ‘less is more’ (the less you put in the more likely you are to find a person on the system). Search on each field separately.

The fields available to use for searching are:

- Surname & First Name
- Date of Birth
- First line of the Address
- Post Code



Find Adult or Child [Reset] [Search] Query Types: Basic Default Simple Error Tolerance Advanced Error Tolerance

Personal Details

Surname

Forename

Include Similar

Gender

Date of Birth

Age

Type

Address

House No. or Name

Street

Town

Post Code

Search Previous Addresses?

References

Identifier

Identifier Type

Child's Case

CP Status

CLA Status

Referral Status

Child In Need Code

Legal Status

Involvements

Case Worker [<Click here to select a user>](#)

Designated Manager [<Click here to select a user>](#)

Case Worker's Team [<Click here to select a department>](#)

➤ **Enter your search criteria:**

When searching there may be some names/addresses that you are unsure of the spelling. For example if you were searching for Linda Smith, using the wild card at the end of the forename will also capture anyone on the system that also has a middle name

- **Forename:** Linda%
- **Surname** Sm%

➤ **Click on Search**

Once a search has been carried out a new page will appear called **Results**. A maximum of 100 results will be retrieved at any one time, therefore if the person you have searched for does not appear on the list you will need to refine for query and amend your search criteria

4. WILD CARDS

A wild card can be used to represent one or many characters. It can be added at the beginning, middle or end of your search criteria and is represented by either an asterisk * or a percentage sign %

Searches using names: Searching for a person's forename Linda – this could have been entered into LCS as Lynda, Linda, Lin, Lyn, Lynne or Lindsay

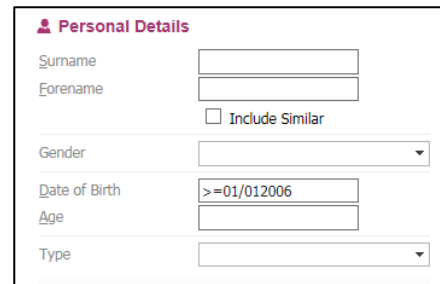
To make the search easier, you could enter the following: ***L*n***

It is recommended that 'wild cards' (* or %) always be used to improve the success of a search

Searches using Dates of Birth: There may be times when you want to set parameters for the date of birth. For example you know the person was born sometime during 2006 but you are unsure of the exact date

The DOB search allows you to search for a date greater than the specified date and/or less than a specified date as shown below:

- <Less than
- >Great than
- = Equals

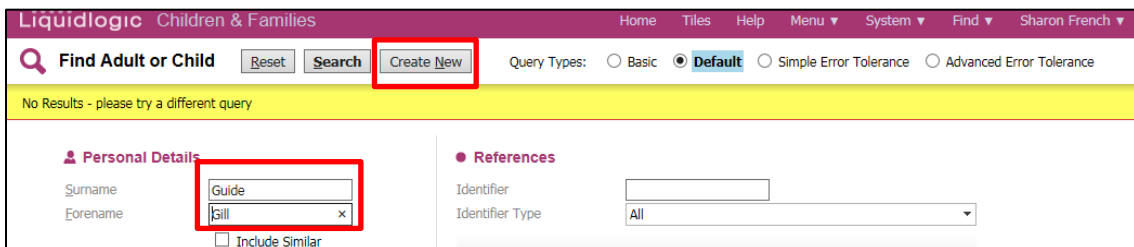


A screenshot of a search form titled "Personal Details". It contains several input fields: Surname, Forename, a checkbox for "Include Similar", Gender (a dropdown menu), Date of Birth (with a date range selector set to ">=01/012006"), Age, and Type (a dropdown menu).

5. CREATING A PERSON RECORD

You are only able to create a person after you have carried out a thorough search of the database and no matching record exists.

- Select **Find Service User** from the Home Page
- Enter the search criteria for the person you want to create
- Once the search has been carried out and no matching persons have been found, click on **Create New**



A screenshot of the "Liquidlogic Children & Families" search interface. The top navigation bar includes "Home", "Tiles", "Help", "Menu", "System", "Find", and "Sharon French". The main search area has a "Find Adult or Child" button, "Reset", "Search", and "Create New" buttons. Below the search area, a yellow banner displays "No Results - please try a different query". The "Personal Details" section has input fields for Surname (containing "Guide") and Forename (containing "Skill"), with an "Include Similar" checkbox. The "References" section has an "Identifier" field and an "Identifier Type" dropdown menu set to "All".

- You will be taken to the following screen

LCS – Child Sexual Exploitation Workspace – User Guide

V.1.1

Find Adult or Child [Cancel] [Create]

Personal Details

Case Number

Title

Surname Guide

Forename Gill

Preferred Name

Gender

Date of Birth / Expected DOB

OR

Approximate Age

Date of Death

Education / Work Status

Marital Status

Primary Address

Address [Lookup Address]

Valid since

Secondary Address

Address [Lookup Address]

Valid since

Current Address

Address [Lookup Address]

Valid since

- Any fields in **Red Font** are mandatory and data must be entered in order to create the person record
- Recording a DOB, death or a valid address can either be typed in using the format dd/mm/yyyy or be selecting the calendar icon
- Complete any details on the **Additional** and **Identity** Tabs
- **Address Lookup** – click on the **Lookup Address** Link – you will be taken to the following screen where you are able to search for an address:

Gazetteer / Address Lookup ... [Cancel]

[Search for Address] [Reset]

Address

House No / Name

Street

Area

Town / City

County

Post Code

Country

[New Address] [Clear Address]

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'.

- Enter some search criteria (*The wild card can be used in any of the fields to replace one or more characters*)

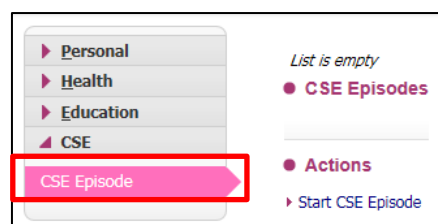
- Click **Search for Address**, this will bring back a list of results
- To select one of the addresses from the list, click on the Address

NB: If the address is not on the list you may need to refine your search criteria

6. STARTING AN EPISODE

The CSE Workspace Tab provides a summary of the various details entered within the CSE Episode and users will be able to create separate Episodes

- From the **Basic Demographics** Tab, click on the **CSE Workspace** Tab, bottom left hand side of the screen



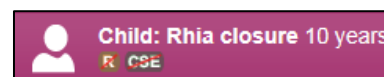
- Then click on **Start CSE Episode**

- Enter the **Title** of the Episode and **Start Date**; then click on **Create**

- A **CSE** Icon will be displayed on the person banner. This will only be visible to users with access to the workspace



- When the **CSE Episode** is closed, the Icon will be greyed out and crossed through




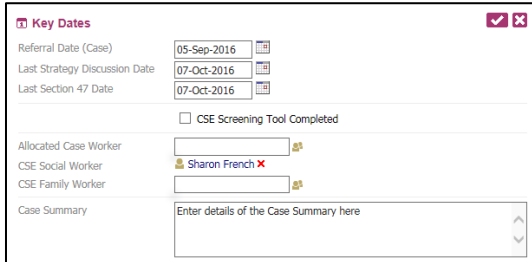
7. CSE TAB

The CSE Tab displays the CSE Social Worker who has consent to access the episode, the Case Referral Date, the Referral to CSE Date and the CSE Episode End Date

By clicking on the Pencil Icon  you are able to update the:

I. Key Dates

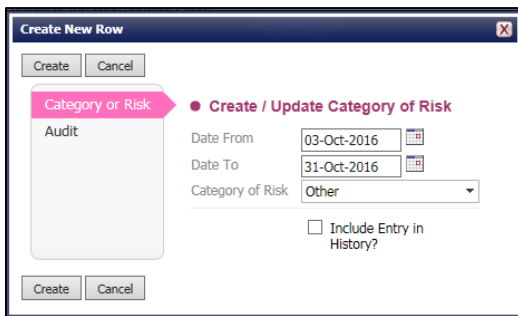
Once all the information has been entered into the relevant fields, click on the  to save the information



II. Category of Risk

Click on the link **New Category of Risk**

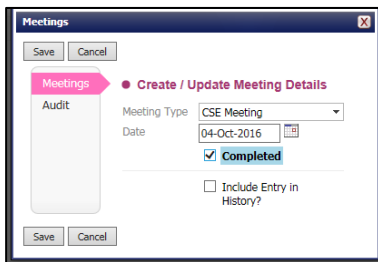
Enter the Date From, Date to and Category of Risk; then click on **Create**



III. Meetings

Click on the link **New Meetings**

Enter the Meeting Type and date of meeting; then click on **Save**. If the meeting has taken place, put a tick in the Completed Box



To delete either a Category of Risk or Meeting, place a tick in the box next to the Risk or Meeting you want to delete, then click on the **Delete Selected** button

The screenshot shows two sections: 'Category of Risk' and 'Meetings'. The 'Category of Risk' section has a table with columns 'Date From', 'Date To', and 'Category of Risk'. A row is selected with '03-Oct-2016', '31-Oct-2016', and 'Other'. Below the table is a 'Delete Selected' button and a link 'New Category of Risk'. The 'Meetings' section has a table with columns 'Meeting Type', 'Date', and 'Completed'. A row is selected with 'CSE Meeting', '04-Oct-2016', and 'Yes'. Below the table is a 'Delete Selected' button and a link 'New Meetings'.


8. FURTHER DETAILS TAB

The Further Details Tab lists all health issues, education, employment and training status, the current living situation and the outcome of the social care or Strategy Meeting and the main focus of support provided.

By clicking on the Pencil Icon  you are able to update the:


I. Social Care Responses and Outcomes

The screenshot shows the 'Social Care Responses and Outcomes' form. It has two main sections: 'Outcome of social care or strategy meeting' and 'Main Focus of support provided'. The 'Outcome' section has a list of checkboxes: 'Child in Need (CIN)', 'Child Protection Plan (CPP)', 'Common Assessment Framework (CAF)', 'Criminal proceedings against abuser', 'Criminal proceedings against child/young person', 'Holistic approach by your service', and 'Looked After Child (LAC)'. The 'Main Focus' section has a list of checkboxes: 'Alcohol misuse', 'Boosting resilience', 'Criminal behaviour', 'Education', 'Family support', 'Helping child recognise abuse process', and 'Mental health'. The 'Family support' checkbox is checked.

Once all the information has been entered into the relevant fields, click on the  to save the information

II. Current Living Situation

The screenshot shows the 'Current Living Situation' form. It has several dropdown menus: 'Living Situation' (set to 'With Family'), 'Location if with family' (set to 'Family Home'), 'Location if looked after', 'Legal Status if looked after', 'Location if in secure / custody', and 'Location if independent (not CLA)'. There is also a text area for 'Current Living Situation Comments'.

Once all the information has been entered into the relevant fields, click on the  to save the information

III. Health Issues

Health Issues

Alcohol Misuse: Yes

Substance Misuse: Unknown to you

Mental Health Issues: No


Sexual Health Issues: Unknown to you

Sexual Health Screening & Contraception Offered / History: Contraception offered and refused

Emotional Health: [Empty]

Sexual Identity: Heterosexual-

Health Issues Comments: [Empty]

Once all the information has been entered into the relevant fields, click on the  to save the information

IV. Education / Employment / Training


Education / Employment / Training

Education: Truancy

Statemented: No

Training / Employment: Not applicable to this child

Education / employment / training comments: [Empty]

Once all the information has been entered into the relevant fields, click on the  to save the information

9. RISKS / ACTIONS TAB

The Risks / Actions Tab lists Referrals to other Services, who made the referral, the referral acceptance date. The nature of the exploitation, who initiated it, method of coercion use and nature of location. Criminal justice issues, police actions, operations, when the investigation was initiated and court proceedings and other risks factors, such as domestic violence.

By clicking on the Pencil Icon  you are able to update the:

I. Nature of Exploitation

Nature of Exploitation

Who Initiated Sexual Exploitation: Single adult


Method of Coercion Used: Grooming by an Older Individual

Nature of Sexual Exploitation: Risky Behaviour

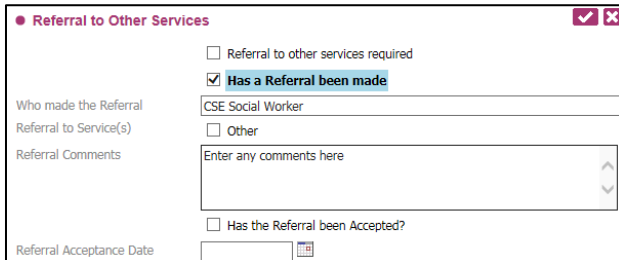
Nature of Location: [Empty]


Nature of Exploitation Comments: [Empty]



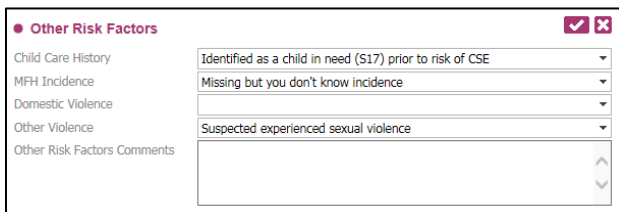
Once all the information has been entered into the relevant fields, click on the  to save the information


II. Referral to Other Services



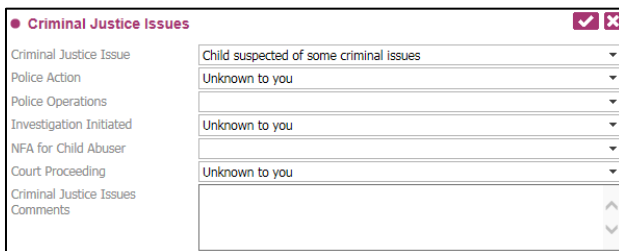
Once all the information has been entered into the relevant fields, click on the  to save the information


III. Other Risk Factors



Once all the information has been entered into the relevant fields, click on the  to save the information

IV. Criminal Justice Issues



Once all the information has been entered into the relevant fields, click on the  to save the information

10. SERVICES TAB

I. Service Provisions

● Service Provisions

List is empty

▶ New Service Provision

Click on the link **New Service Provision**

Details / Dates Tab: Enter the **Service Provisions Details**, the Description of Service, Planned Start and End Date. The Actual Dates the Service started and the Review Date and any other details, for example, the statues of the service, the main beneficiary and if the service has ended, the end reason

Provider Tab: Enter the required units, frequency, costs and service provision details and the names of the providers

Once all the relevant fields have been completed; click on **Create**

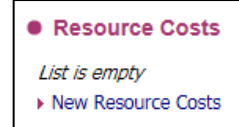
To delete a service provision, place a tick in the box next to the service provision you want to delete, then click on the **Delete Selected** button

<input checked="" type="checkbox"/>	Start Date	End Date	Review Date	Description of Service	Units	Frequency	Cost
<input checked="" type="checkbox"/>	03-Oct-2016			Enter the description of the service here	1	Weekly(days)	25.00

Delete Selected

▶ New Service Provision

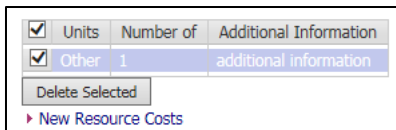
II. Resource Costs



Click on the link **New Service Provision**

Enter the number of Units and any additional information; then click on **Create**

To delete a resource cost, place a tick in the box next to the resource cost you want to delete, then click on the **Delete Selected** button



11. ALLEGATIONS TAB

The **Allegations (Perpetrator)** and **Allegations (Victim)** are created in the Personal Tab, Basic Demographics by a specific person; therefore you will not be able to amend/update this information under the Allegations Tab unless you have the relevant permissions

If an **Allegation (Perpetrator)** is recorded in the main demographics and the Young Person is the Perpetrator, details of the Allegation will be displayed here and the user will be able to select the Allegation to view further details

If an **Allegation (Victim)** is recorded in the main demographics and the Young Person is the Victim, details of the Allegation will be displayed here and the user will be able to select the Allegation to view further details

I. Allegations (Location)



Click on the **New Locations** Link

Create / Update the Location Details Start Date, End Date (when required), Location Details and Location Type; then click on **Create**

LCS – Child Sexual Exploitation Workspace – User Guide

V.1.1

● **Create / Update Location Details**

Started On: 03-Oct-2016

Ended On:

Location Details: Enter Location Details here

Location Type: Unknown to you

Include Entry in History?

To delete a Allegations (Location), place a tick in the box next to the Allegation you want to delete, then click on the **Delete Selected** button

<input checked="" type="checkbox"/>	Started On	End Date	Location Details	Location Type
<input checked="" type="checkbox"/>	03-Oct-2016		Enter Location Details here	Unknown to you

Delete Selected

II. Allegations (Vehicles)

● **Allegations (Vehicles)**

List is empty

▶ New Vehicles

Click on the **New Vehicles** Link

Create / Update Vehicle Details Start Date, End Date (when required), Vehicle Make, Model, Registration Number and Colour; then click on **Create**

Create New Row

Create Cancel

Vehicle

● **Create / Update Vehicle Details**

Audit

Started On: 03-Oct-2016

Ended On:

Vehicle Make: Renault

Vehicle Model: Megane

Registration: XXXXXXXX

Colour: Blue

Include Entry in History?

Create Cancel

To delete a Allegations (Vehicle), place a tick in the box next to the Allegation you want to delete, then click on the **Delete Selected** button

<input checked="" type="checkbox"/>	Start Date	End Date	Vehicle Make	Vehicle Model	Registration	Colour
<input checked="" type="checkbox"/>	03-Oct-2016		Renault	Megane	XXXXXXXX	Blue

Delete Selected

III. Allegations (Telephones/Mobiles)

● **Allegations (Telephones/Mobiles)**

List is empty

▶ New Telephone Numbers

Click on the **New Vehicles** Link

Create / Update Telephone / Mobile Details, Start Date, End Date (when required), Telephone Number and any further details; then click on **Create**

The screenshot shows a 'Create New Row' dialog box with a 'Phone Details' tab selected. The dialog contains the following fields and options:

- Create / Update Telephone / Mobile Details** (selected)
- Audit** (empty list)
- Started On**: 03-Oct-2016
- Ended On**: (empty)
- Telephone Number**: 1234567890
- Details**: (empty text area)
- Include Entry in History?**

To delete a Allegations (Telephones/Mobiles), place a tick in the box next to the Number you want to delete, then click on the **Delete Selected** button

<input checked="" type="checkbox"/>	Start Date	End Date	Telephone Number	Details
<input checked="" type="checkbox"/>	03-Oct-2016		1234567890	

Delete Selected

12. FORMS TAB

The Forms Tab contains a list of all forms /exemplars created that are specific to the CSE Workspace. The first time looking at the Tab after the episode has been created, the list will be blank.

To start a new form, click on the link **Attach a New Form**; Then click on **CSE MASE Minutes**; then click on **OK**



The screenshot shows a 'Create New Form for Child: Call Guide' dialog box. It contains the following elements:

- Select the type of form to be created from the list below.**
- CSE MASE Minutes** (selected)

If there are no previous Minutes for the person you will not have the option to copy forward any answers at this time, therefore click on **Start Blank** and the form will open for you to complete.

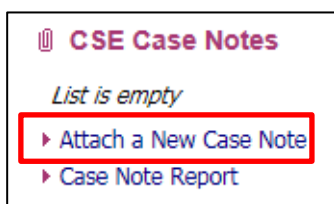
13. CASE NOTES TAB

Case Notes can be added at any time against a person record and should be used to detail ongoing activity against a case, for example, phone calls, emails, letters etc.

The Case Notes tab lists all saved and finalised case notes. This tab also provides the ability to create a new case note, update an un-finalised case note, filter the list of case notes based on the entered free text criteria or produce case note reports

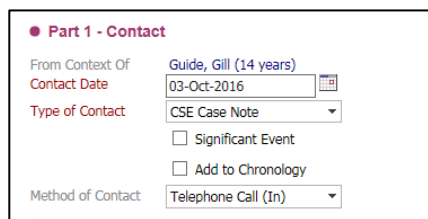
I. Creating a Case Note

From the Case Note Tab click on the link **Attach a New Case Note**



The case note is divided into 3 areas:

➤ Part 1 – Contact



**Add to chronology, please see heading Other Functionality*

Enter the **Contact Date**, for example the date of the phone call, date of visit or date letter received

The **Type of Contact** is automatically generated

Select the **Method of Contact**

➤ Contact Regarding

This will automatically default to the person's record that you are in. It will also list all other family members that are recorded under the Relationships Tab.

LCS – Child Sexual Exploitation Workspace – User Guide

V.1.1

Contact Regarding	Relation	Name	Age	At Contact	Interviewed?	Seen?	Alone?	Bedroom?	Regarding Assessment
Children / Young People involved in this Case Note									
<input checked="" type="checkbox"/>	Self	Gill Guide	14 years		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None
Adults also present / interviewed									
No Adults recorded...									
Other relations you can add to this case note									
No other relations can be linked to the case note...									
Other relations you cannot add to this case note									

This is a mandatory field and you will need to state whether you had interviewed or seen the person in respect of the Case Note

Click on **Self**; then

Please tick if the person was interviewed, or seen during the process and whether you need to notify your Supervisor/Manager; then click on **Update**

Update Case Note Individual: Guide, Gill (14 years)

Update Case Note Individual: Guide, Gill (14 years)

Individual's Name: Guide, Gill (14 years)
 This individual is a Child / Young Person

Please tick if "Gill Guide" was interviewed

Interviewed? Yes No

Please tick if "Gill Guide" was seen during the interview

Seen During Interview? Yes No
 Seen Alone? Yes No
 Seen Bedroom? Yes No

Notify Role(s)

Case Worker's Supervisor (Sharon French, ICT Analyst)

Notify User(s)

+ Select another user to be notified...

Interview Concerning

[Link to Form](#)
[Remove this Individual from the Case Note](#)

➤ Reason for Contact

Enter the details of the phone call, visit, email or letter in the **Reason for Contact**

Reason for Contact	Enter the details of the phone call, visit, email or letter here
Detailed Notes	
Analysis of information	
Action	

Once you have completed and entered all the information into your case note, click on **Create** and it will take you back to the Case Note Tab

CSE Case Notes							
<input type="checkbox"/> Finalised?	Significant Event	Contact Date	Type of Contact	Contact Regarding	Reason for Contact	Created By	Status
<input type="checkbox"/> No	<input type="checkbox"/> No	03-Oct-2016	CSE Case Note	Gill Guide	Enter the details of the phone call, visit, email or letter here	Sharon French	Private
Attach a New Case Note Case Note Report							

At this point you can still amend/update your case, or finalise it to stop further editing

II. Finalising / Updating / Printing a Case Note

Select the Case Note that you want to update or finalise by clicking on it

Under Actions you will have the options to either Update this Case Note, Finalise Case Note or Print it through Printable View

Part 1 - Contact
 From Context Of: Gillie, Gill (14 years)
 Contact Date: 03-Oct-2016
 Type of Contact: CSE Case Note
 Add to Chronology: No
 Method of Contact: Telephone Call (In)

Contact Regarding	Relation	Name	Age	At Contact	Interviewed?	Seen?	Alone?	Bedroom?	Regarding Assessment
Children / Young People Involved in this Case Note									
Self	Gill Guide	14 years	14 years	No	No				None

Adults also present / Interviewed
 No Adults recorded...

Reason for Contact: Enter the details of the phone call, visit, email or letter here

Detailed Notes
 Detailed Notes

Part 2 - Write Up
 Analysis of Information
 Action

Actions
 Update this Case Note
 Finalise Case Note
 Printable View

Click on the **Update this Case Note** link – once you have updated it, you will have the option to **Finalise, Save, Save and Close or Close**.

- **Finalise** will complete the case note and lock it, stopping further editing
- **Save** will save the case note and keep the case note open
- **Save and Close** will save the case note and close the screen
- **Close** will close the screen without saving any changes

To print the case note click on the link **Printable View**; select the orientation and font size; then click on **Print Page Now**

X Close Printable View | Portrait Landscape | Small Medium Large Largest | Print page now |

When a Case Note is Finalised and if the check box is selected next to any case note, then 4 new options appear. Each of these options have a different functionality

Finalised?	Significant Event	Contact Date	Type of Contact	Contact Regarding	Reason for Contact	Created By	Status
<input checked="" type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	03-Oct-2016	CSE Case Note	Gill Guide	Enter the details of the phone call, visit, email or letter here	Sharon French	Private

Comment Publish Make Private Detach

- **Comment** – this will enable a user to add a comment regarding the Case Note

- **Publish** – This will enable the case note to be made public. This means that it will be visible within the young person’s main demographics. Publishing the case note will add an entry to the History Tab and also create an item in the Case Notes Tab
- **Make Private** – This can only be selected if the case note has been published and made public. Clicking this link will make the case note private and only part of the CSE workspace. It will be removed from the person’s History and Case Note’s Tab in the main demographics
- **Detach** - This option is only valid when the case note has been published and made public. This will remove the case note from the CSE workspace altogether. So it is only displayed in the young person’s main demographics. **Note: *When a case note is detached from the workspace it cannot be re-attached, so it will only remain in the main demographics***

NOTE: Once the details within this screen have been entered and the **Finalise Note** button is clicked, the details are then permanent and cannot be edited further – ensure that you check through all the details you have entered before clicking **Finalise**

III. Case Note Report

A link is available within the Case Notes Tab to produce a case note report for all case notes recorded within the CSE workspace

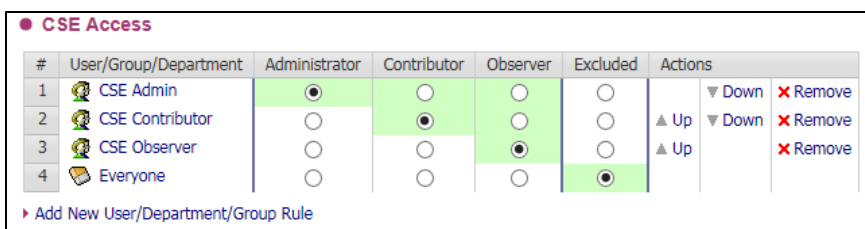
Click on the link **Case Note Report**; you can either select all CSE Case notes, or enter a date range, a worker, a department and order them in Date Descending (showing newest first). Once you have selected your parameters; click on **Show Report**

Case Note Report for Guide, Gill (14 years)

- **Type of Contact**
 - ▶ Select All
 - CSE Case Note
- **Dates**
 - Date From: [Date Picker]
 - Date To: [Date Picker]
- **Written By**
 - Worker: [Dropdown]
 - Department: [Dropdown]
- **Significant Events**
 - Significant Events only?
- **Ordering**
 - Date Descending (Show Newest First)

14. ACCESS TAB

The Access Tab is where access to individual episodes can be controlled. It is possible to add users to individual episodes who may not be a member of the CSE Group so they will be able to view that workspace episode. It is also possible to restrict users from being able to view the CSE episode, even if they are a member of the group given access



#	User/Group/Department	Administrator	Contributor	Observer	Excluded	Actions
1	CSE Admin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	▼ Down ✗ Remove
2	CSE Contributor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	▲ Up ▼ Down ✗ Remove
3	CSE Observer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▲ Up ✗ Remove
4	Everyone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

▶ Add New User/Department/Group Rule

15. AUDIT TAB

An audit is available within the main workspace as well. This will show any changes and view of workspace items and show what items were updated and by whom

16. OTHER FUNCTIONALITY - Inclusion of workspace items in History

By default certain workspace details will be shown in the main demographic History Tab. This information will only be visible to users with access to view the CSE workspace episode, otherwise data will be hidden

When a workspace is created or ended, then an entry will appear in the History Tab. Any workspace related forms, documents and case notes will also show in the History by default

LCS – Child Sexual Exploitation Workspace – User Guide

V.1.1

When creating a row in a table, for example Service Provisions, there is a check box to enable the user to select whether they wish for this entry to show in the History

Include Entry in History?

● Case History - Newest events first

Newest Events First | Configure View | Create Chronology | Add to Chronology

Date	Category	Type	Event Details	Actions
04-Oct-2016	CSE Workspace	Workspace table	Service Provision record has been updated	Q +
04-Oct-2016	General Events	Date of Birth change	Date of Birth changed from 03-Oct-2001 to 03-Oct-2002	Q +
04-Oct-2016	General Events	Date of Birth change	Date of Birth changed from 03-Oct-2006 to 03-Oct-2001	Q +
03-Oct-2016	CSE Workspace	Form Draft	CSE MASE Minutes, by Sharon French	Q +
03-Oct-2016	CSE Workspace	Workspace table	New Service Provision record has been added	Q +
03-Oct-2016	CSE Workspace	Case Note	Contact Type: CSE Case Note, Reason for Contact: Enter the details of the phone call, visit, email or letter here	Q +
30-Sep-2016	CSE Workspace	Workspace	CSE Workspace Episode, Started on 30-Sep-2016	Q +
<input type="checkbox"/> 03-Oct-2006	General Events	Address Change	HOME: 14 Broughton Crossing	Q +
03-Oct-2002	General Events	Birth	Born 03-Oct-2002	Q +

However, it is possible to configure the History Tab to show the relevant items. When clicking on *configure view* a new tab of workspace is shown and it is here the items that are included in the History View can be controlled by clicking on the **Workspace Tab**

● Case History - Newest events first

Return to Information View

Select the Dates to include in the Chronology

From Date Until Date (Note: Leave blank to include all dates)

Select Information To Display

Predefined Template

General

Workspaces

CSE Workspace (all | none)

- Episode
- Forms
- Documents
- Case Notes
- Custom Fields
- Records

Special Guardianship Support (all | none)

- Episode
- Forms
- Documents
- Case Notes
- Custom Fields
- Records

Deselect either all or some of the items, and then click on **Return to Information View**, those items will then not show in the History Tab

LCS – Child Sexual Exploitation Workspace – User Guide

V.1.1

● Case History - Newest events first

Newest Events First ▾ Configure View Create Chronology Add to Chronology

Date	Category	Type	Event Details	Actions
04-Oct-2016	General Events	Date of Birth change	Date of Birth changed from 03-Oct-2001 to 03-Oct-2002	🔍 +
04-Oct-2016	General Events	Date of Birth change	Date of Birth changed from 03-Oct-2006 to 03-Oct-2001	🔍 +
<input checked="" type="checkbox"/> 03-Oct-2006	General Events	Address Change	HOME: 14 Broughton Crossing	🔍 +
03-Oct-2002	General Events	Birth	Born 03-Oct-2002	🔍 +

CSE Workspace (all | none)

- Episode
- Forms
- Documents
- Case Notes
- Custom Fields
- Records

17. KEYBOARD SHORTCUTS

KEYSTROKES	ACTION
Ctrl A	Select All
Ctrl B	Bold
Ctrl C	Copies to the clipboard
Ctrl F	Find dialog box
Ctrl I	Italics
Ctrl P	Print
Ctrl T	Creates a New Tab
Ctrl U	Underlining
Ctrl V	Pastes from the clipboard
Ctrl X	Cuts to the clipboard
Ctrl Z	Undo last command
Ctrl Delete	Delete next word
Ctrl Backspace	Delete previous word
Mouse click 3 times	Selects whole paragraph
Ctrl +	Increases zoom by 25%
Ctrl -	Decreases zoom by 25%

LCS – Child Sexual Exploitation Workspace – User Guide

V.1.1

Ctrl 0	Returns zoom to normal
Shift F3	Highlight text then toggle between caps, title case and lowercase
F5	Refresh screen