LCS / Creating a Contact

Liquidlogic Children's Systems (LCS)

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Date: 24.05.2016

DOCUMENT HISTORY

DATE	**PRODUCED BY**	**DOCUMENT VERSION**	**COMMENTS**
24.05.2016	S.ALLWRIGHT	1.0	INITIAL VERSION
28.02.2022	S. WEBB	1.1	REDESIGN

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1. COURSE OVERVIEW

This guide has been specifically designed for the Children & Young People Service who are required to record Contact Records.

By the end of this guide you will be able to:

- Create a Contact Record
- Complete a Contact Record
- Add Attachments
- Export Documents
- Send a Contact Record for authorisation

COURSE PREREQUISITES

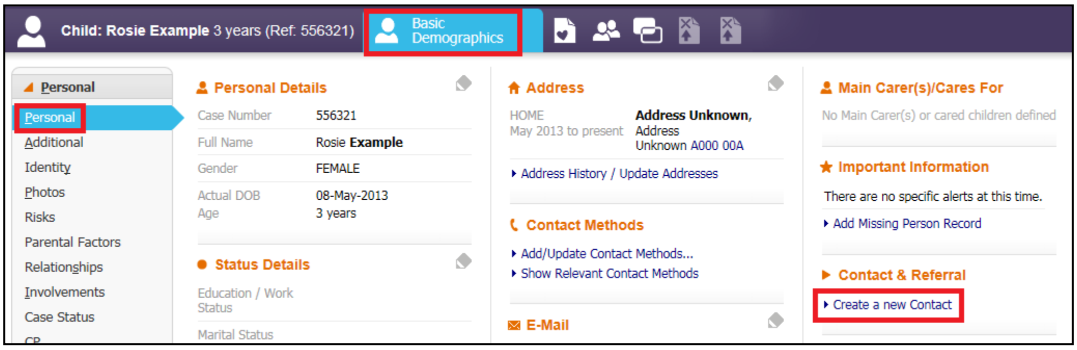
Viewing MeLearning modules.

2. Create a Contact Record

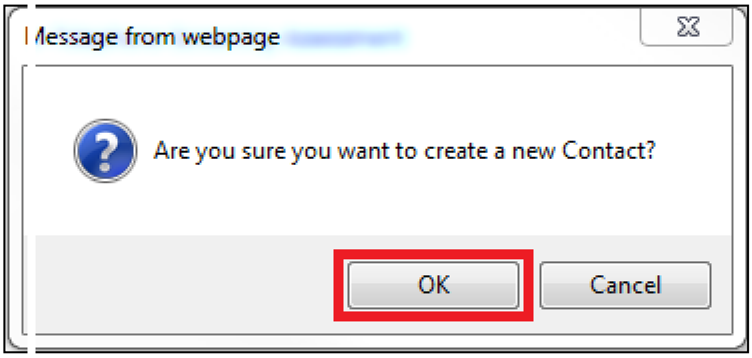
Before creating a contact record you must ensure that you search LCS thoroughly. Once you have search LCS you can create the new record where necessary. Please see the **ICS Quick Reference Guides for Searching and Creating a Person** for guidance on searching for a record on LCS.

2.1. Creating a Contact Record

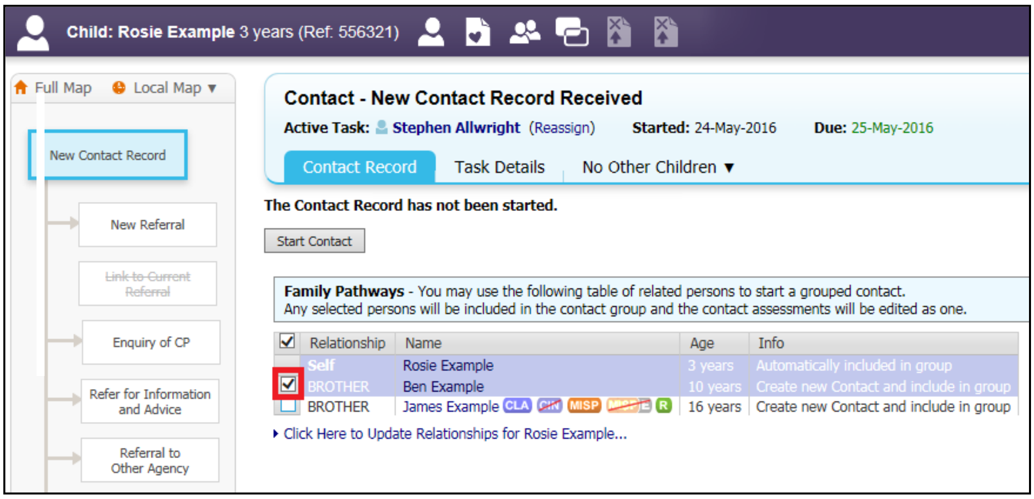
- Click on the ‘Create a New Contact’ link from within the Personal tab of Basic Demographics.



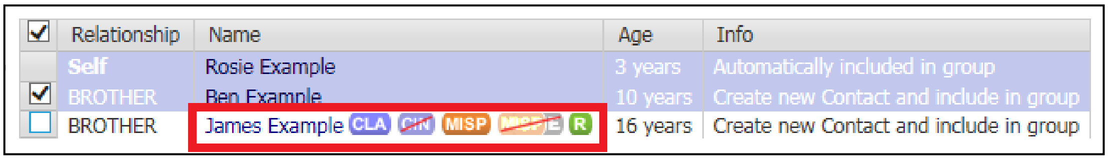
- A pop up appears asking you to confirm if you wish to create a new contact. Select “OK” to confirm or “Cancel” to abort.



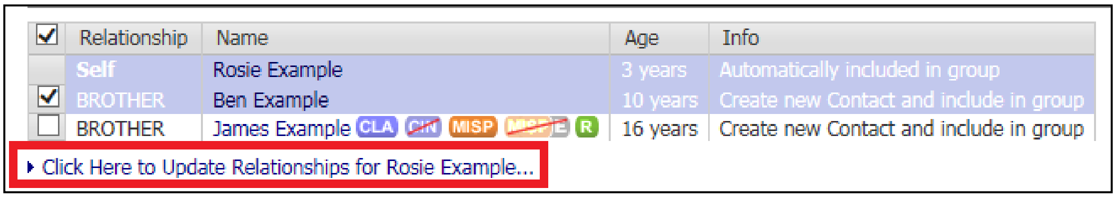
- Next click the box next to the child’s name that needs to have a Contact Record started.



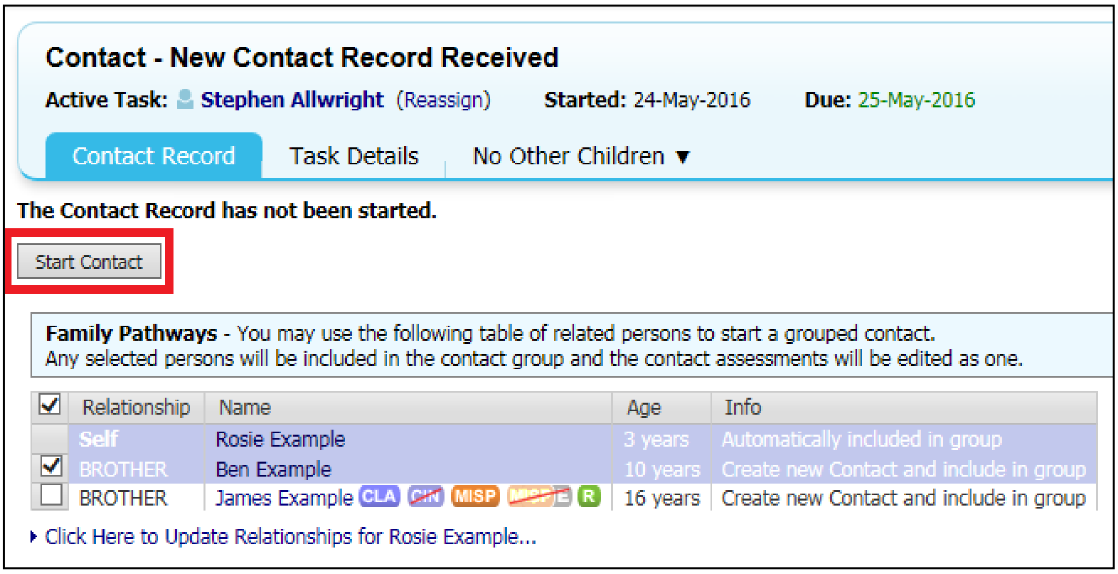
- If any siblings already have an OPEN referral (Green R flag), then the Contact should only be recorded against those without an Open Referral and that the detail is relevant to.



- If a sibling is missing from the list of relationships click the link "Click Here to Update Relationships for (Child's Name)…
- For further guidance on Updating the Relationships please the Basic Navigation Manual



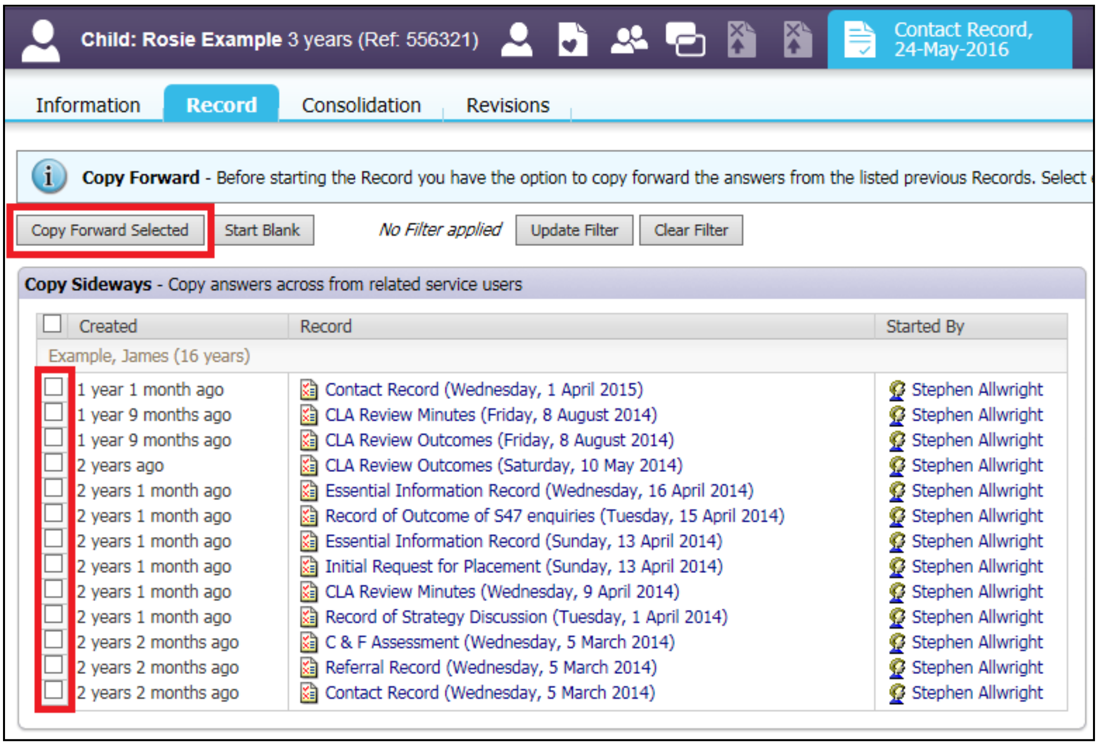
- Click the "Start Contact" button



3. Completing a Contact Record

- You will then be taken to the Copy Forward screen. This screen lists previous completed forms for the child and any siblings.

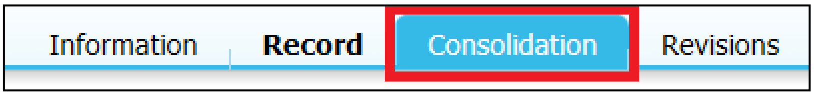
- If you need to Copy Forward any previous information or Copy Sideways information from siblings, click the tick box next to form and then click "Copy Forward Selected".



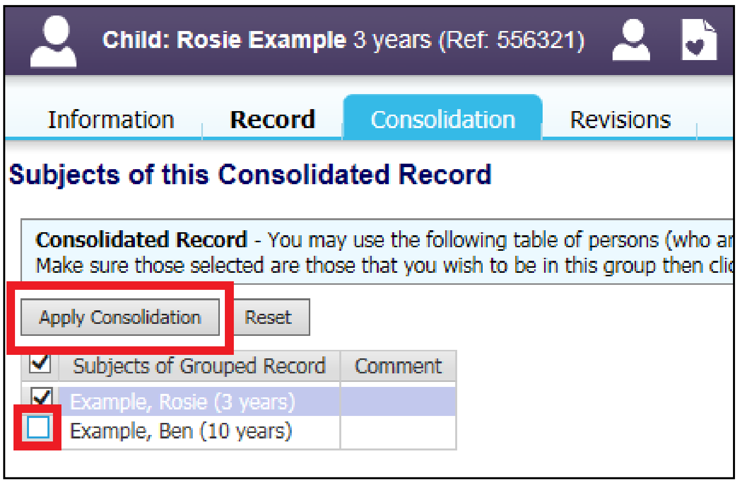
- If you do not wish to copy an previous in formation click “Start Blank”

3.1. Cancelling a Contact Record

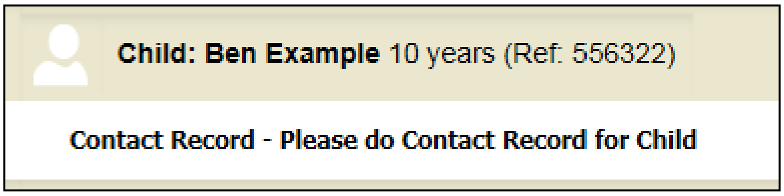
- If you the contact record has been started in error you are able to cancel it
- If the siblings are consolidated and the contact started in error on one of them click the “Consolidation” tab.



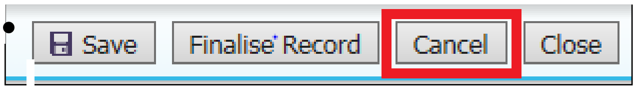
- Click the box next to the sibling who should not have had the contact opened and click the “Apply Consolidation” button



- Click "Home" to return to your worktray
- By the child who has had the contact started in error click the task "Contact Record – Please for Contact Record for Child"

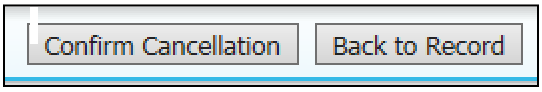


- Then click the "Cancel" button

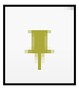
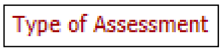


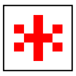
- As shown below you will then need to input a Cancellation Date and a Cancellation Reason.

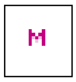
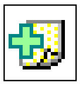
- Click the "Confirm Cancellation" button. If you click "Back to Record" stop the contact from being cancelled.

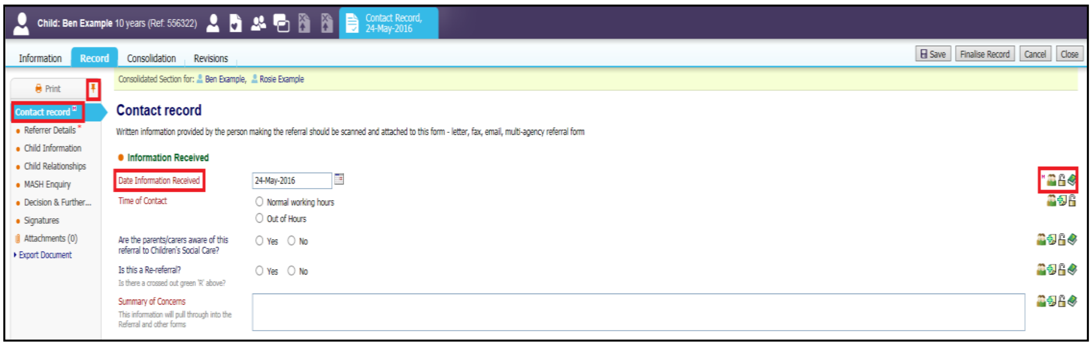


3.2. Navigating around the Contact Record

- The current Sidebar bar may be truncated – either hoover the mouse over the heading to read in full or click on the "Pin" icon to set the size to automatically adjust to autofit each Sidebar heading. 
- To move to another sidebar, simply click on the Sidebar heading.
- Any field depicted in red means it is a mandatory field. You cannot finalise without completing all mandatory fields. 

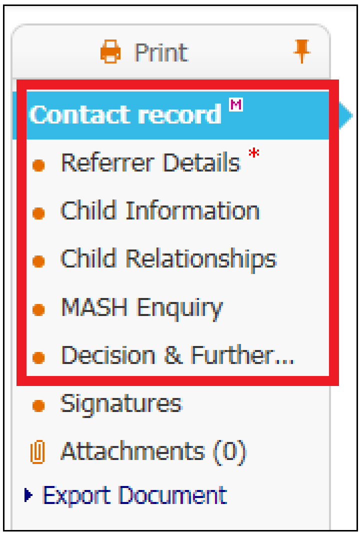
- A red * displays when you have filled in a field. A blue * would be if somebody else filled in a field. 
- The "Family Working" icon allows you to unconsolidate a field – enabling you to create separate answers to a question for siblings. You can also rejoin the answers. 

- An "M" means the field is not editable and has been automatically merged. 
- A "post it note" allows you to enter a comment (which doesn't print out). 
- A "green manual" allows you to read the help guidance. Hoover the mouse to read the instructions or click on the icon to view on a separate screen. Click on "Return to Form" at the top of the page to return to the original screen. 
- The "Open Lock" means that question has <u>not</u> been locked for security. 



3.3. Filling out the Contact Record

- When a contact Record is started it should be completed within 24 hours.
- Go through the tabs on the left hand side of the screen to fill out the relevant information about the contact record.

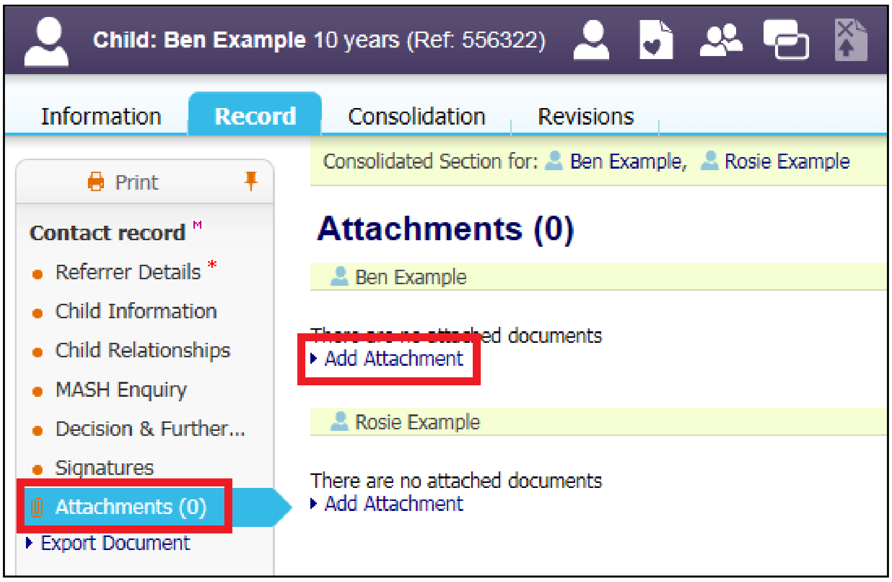


- <u>Referral Details</u> – Requires information about the person making the referral
- <u>Child Information</u> – You are able to update the Ethnicity Information by clicking "Update Ethnicity Details"
- <u>Child Relationships</u> – You are able to update the relationships for the child/young person

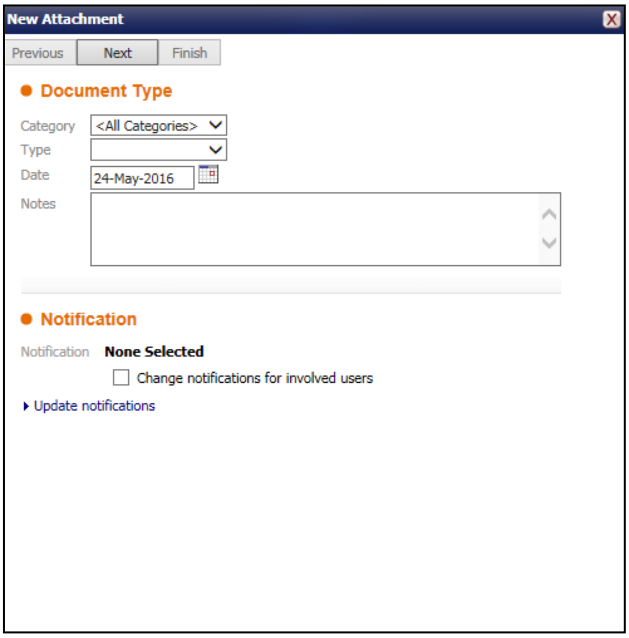
- MASH Enquiry – Enables to state whether a MASH Enquiry has been completed
- Decision & Further Action – You state what the Outcome of the Contact Record is and the reasons for the Outcome

3.4. Attaching Documents

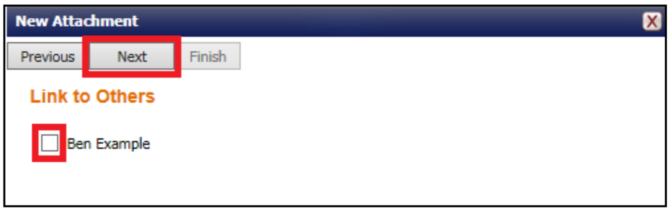
- There are times when extra information is received from referrers. It is possible for this information to be attached to the contact record.
- Within the contact record click the "Attachments" tab and then click "Add Attachment"



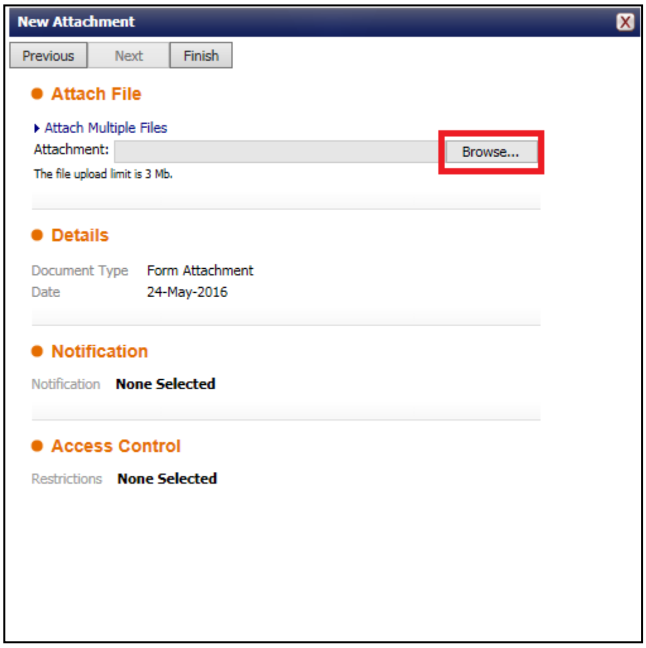
- Then click in Category drop down menu and choose either "Form Attachment" or "Transfer"
- Click the Type drop down menu, if you choose the one option that is shown.



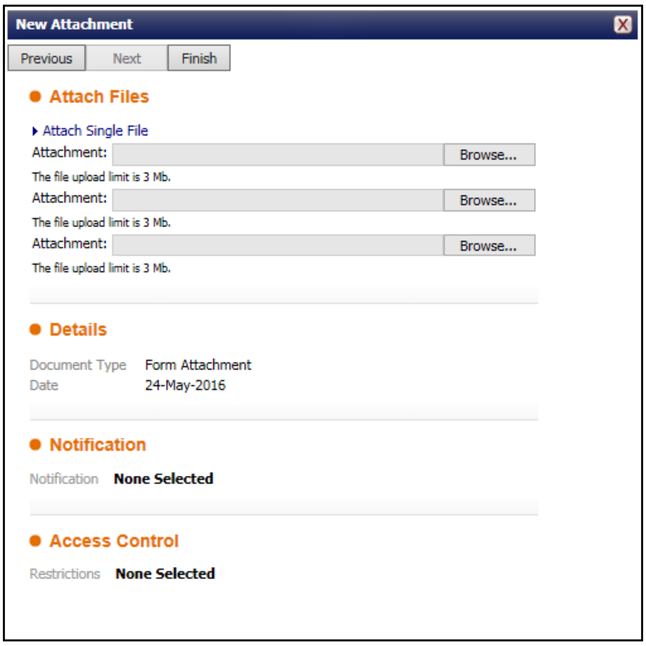
- Then input the Date and any Notes
- Then click the "Next" button
- You can link the siblings attachments so that you only have to input the attachment once.
- Click the box next to the siblings name and then click the "Next" button



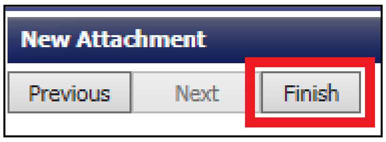
- Next you can add the file you want to attach. Click the "Browse" button and search for the file.



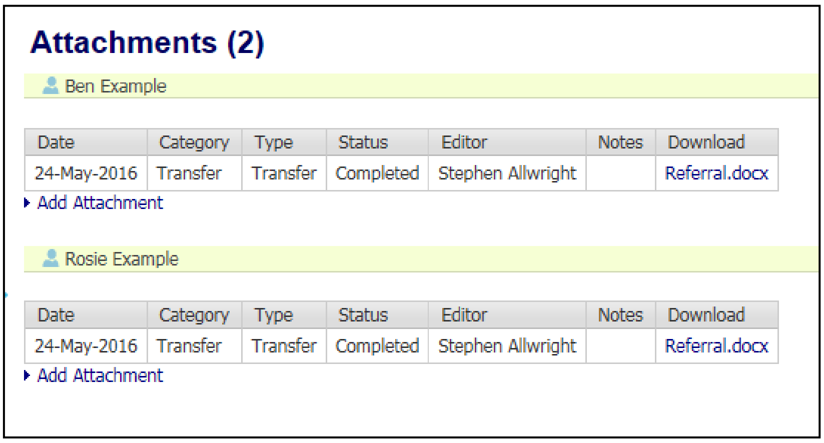
- If you wish to attach more than one document click “Attach Multiple Files”. Your screen will then show the below box.



- One you have found the relevant files click “Finish”



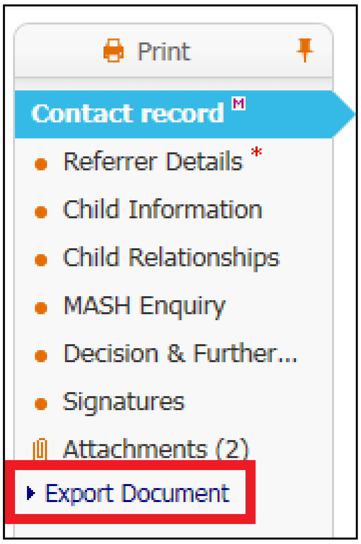
- The document will then be attached to the form.



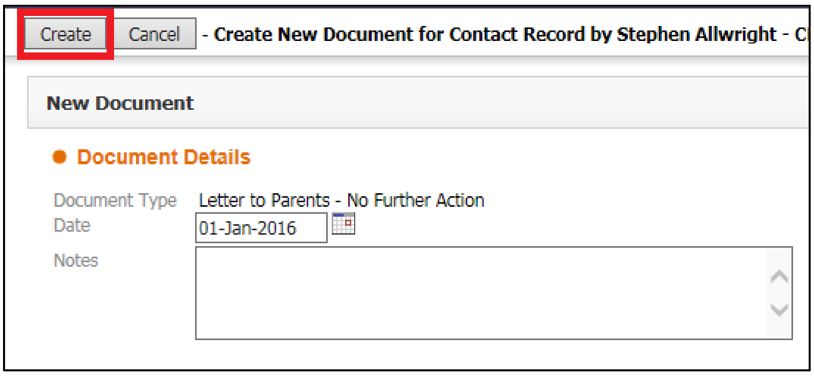
3.5. Exporting a Document

Within the Contact record there are letter templates that advise Parents and Referrers when either an Assessment needs to be carried out or No Further Action is being taken.

- Within the Contact Record click the "Export Document" link



- Input the date
- Click the Category drop down menu and choose either:
  - Referrer
  - Parent
- Click the Type drop down menu and choose either:
  - Letter to Parents – Assessment Required (CF)
  - Letter to Referrer – Assessment Required (CF)
  - Letter to Parents – Early Help Triage
  - Letter to Referrer – Early Help Traige
  - Letter to Parents – No Further Action
  - Letter to Referrer – No Further Action
- Once you have picked the Category and Type click the "Create" button

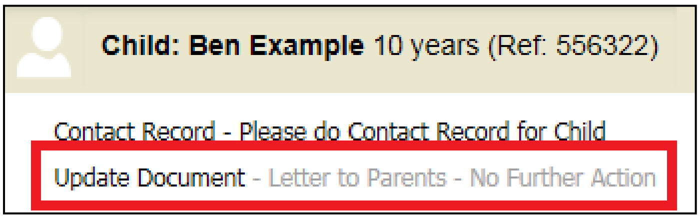


- You will then be able to Download the Document by clicking "Download Document"

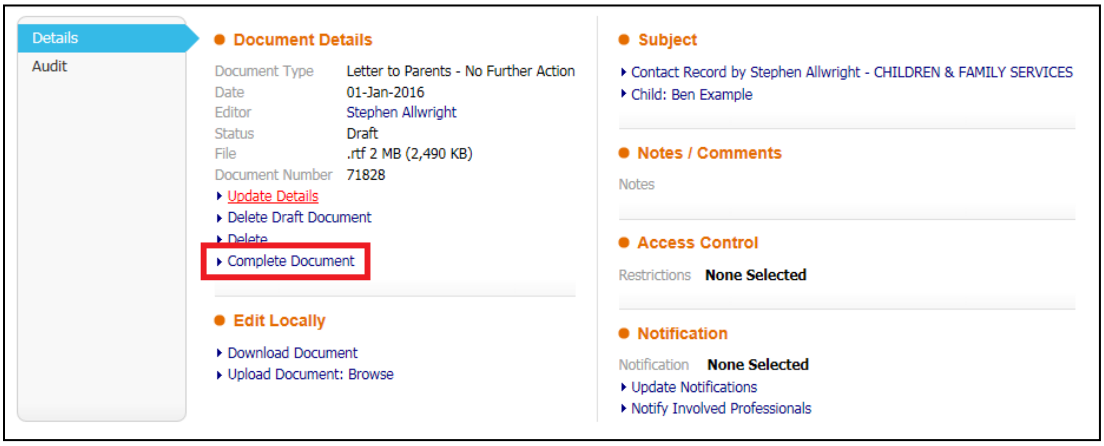
- This will then open a Word Document which you will be able to save and Print out.

3.5.1. Completing Alerts

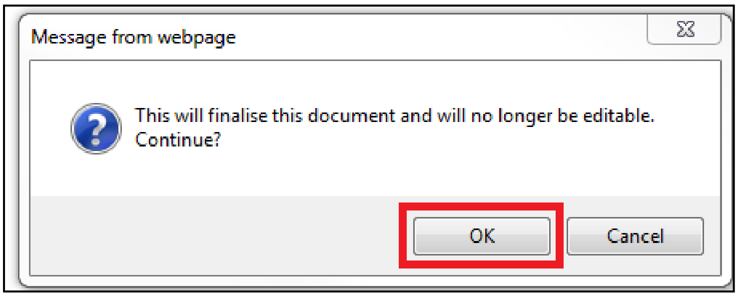
- From Exporting the document you will have an alert task in your worktray
- Click "Home"
- Click the task by the children you are working "Update Document - …."



- Once you have sent out the letters to the Parents/Referrer click the "Complete Document" link



- If you are happy to finalise the document click "OK" in the pop up box.



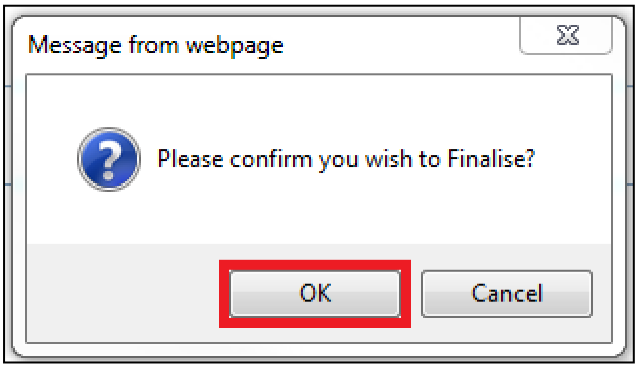
- This will then remove the alert task from your tray.

N.B. If siblings are consolidated in a contact you will need to complete the points from 3.5.1 for each child.

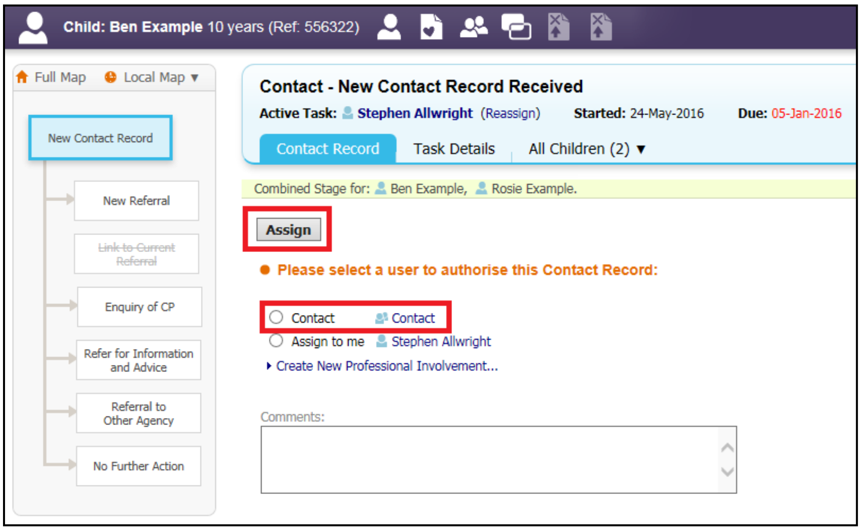
4. Finalising the Contact Record

- Once the contact record has been filled out click the “Finalise Record” button

- If you are happy to finalise click “OK” in the pop alert



- You will then need to decide who the Contact Record is authorised by.
- Click the circle next to “Contact” and then click “Assign”



- A manager will then pick the contact record up from the Contact tray and either authorise or request further information.

For any questions or queries please contact the LCS Support Mailbox and an LCS Support Officer will respond and assist you.