



# **LCS / Post Adoption Support Workspace User Guide**

**Liquidlogic Children's Systems (LCS)**

Author:

Date:

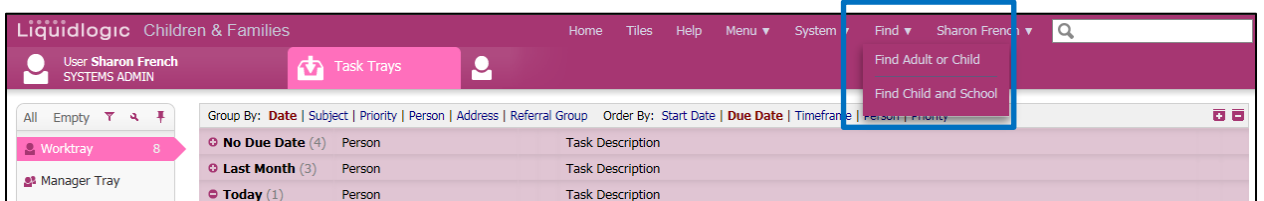
## Table of Contents

1.	SEARCHING.....	1
2.	WILD CARDS .....	2
3.	CREATING A PERSON RECORD .....	3
4.	STARTING AN EPISODE .....	4
5.	POST ADOPTION TAB.....	5
6.	FORMS TAB .....	5
7.	DOCUMENTS TAB.....	6
	• Exporting Documents.....	7
	• Uploading Exported Documents.....	8
8.	CASE NOTES TAB.....	10
	• Creating a Case Note.....	11
	• Finalising / Updating / Printing a Case Note.....	12
	• Case Note Report.....	14
9.	SERVICES TAB.....	15
10.	ACCESS TAB .....	17
11.	AUDIT TAB .....	17
12.	OTHER FUNCTIONALITY .....	17

## 1. SEARCHING

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

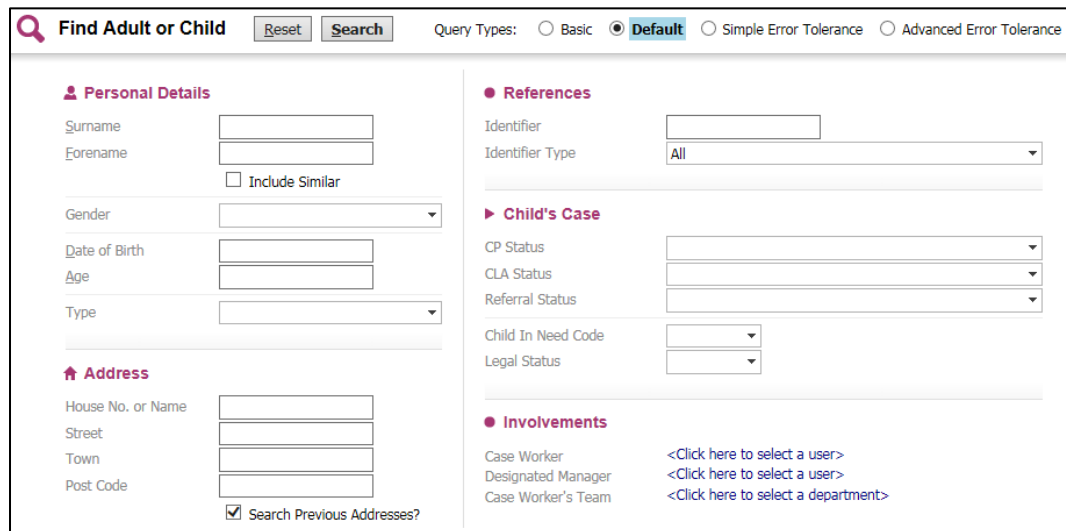
- Select **Find Adult or Child** from the **Find** drop down menu on the toolbar at the top of the screen



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

## 2. 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

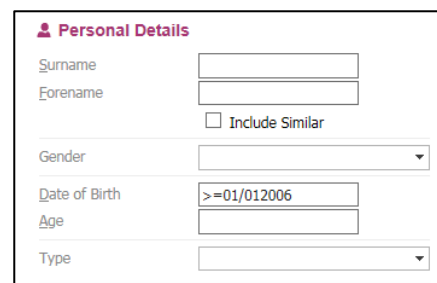
To make the search easier, you could enter the following: \*L\*n\*

**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



Personal Details	
Surname	<input type="text"/>
Forename	<input type="text"/>
	<input type="checkbox"/> Include Similar
Gender	<input type="text"/>
Date of Birth	<input type="text" value="&gt;=01/012006"/>
Age	<input type="text"/>
Type	<input type="text"/>

## 3. 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**

- You will be taken to the following screen

- 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 ...**

**● Address**

House No / Name

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'.

- 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

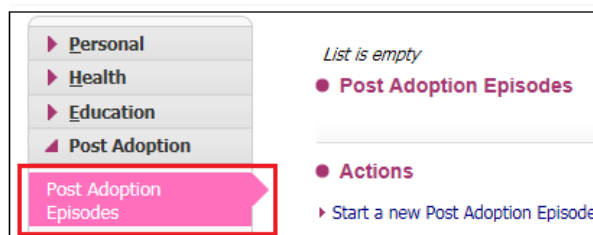
**NB:** If the address is not on the list you may need to refine your search criteria

#### 4. STARTING AN EPISODE

The Post Adoption Support (PAS) Workspace Tab provides a summary of the various details entered within the PAS Episode and users will be able to create separate Episodes

The PAS Workspace Tab

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



- Then click on **Start a new Post Adoption Episode**
- Select from the options the **Title** of the Episode, enter the **Start Date**; then click on **Create**

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




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




## 5. POST ADOPTION TAB

The Post Adoption Episodes Tab displays the Key Adoption Dates, and End Post Adoption Episode link.

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

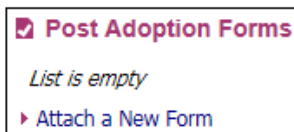
● **Key Adoption Dates** ✔ ✕

Letterbox Number	<input type="text"/>	
Date the person was adopted	<input type="text"/> 	
Date the person will turn 18	<input type="text"/> 	
Date they turn 21	<input type="text"/> 	
Adoption Worker	<input type="text"/> 	
Details	<div style="border: 1px solid #ccc; height: 40px;"></div>	

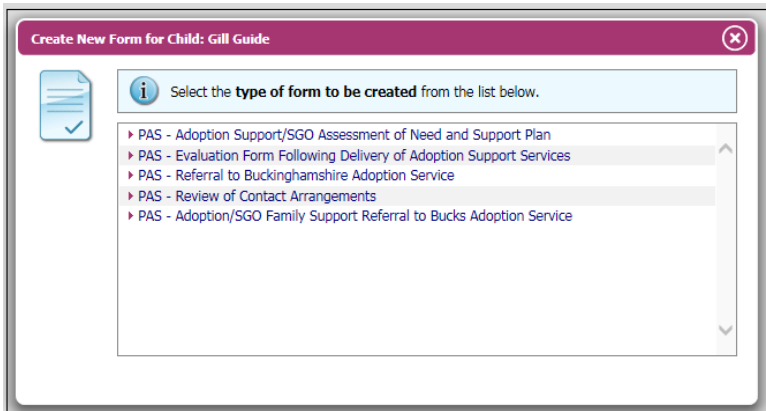
Once all the information has been entered into the relevant fields, click on the  to save the information

## 6. FORMS TAB

The Forms Tab contains a list of all forms/exemplars created that are specific to the PAS 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 select from the list which form you wish to create:



If there are no previous Forms completed 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. *Please note that the copy forward functionality only works if there are questions within the new form that match questions from the forms you are copying forward.*

Follow the instructions further below 'Exporting Documents' and 'Uploading Exported Documents' on how to download/upload documents.

## 7. DOCUMENTS TAB

The Documents Tab contains a list of all documents/letters created that are specific to the PAS Workspace. The first time looking at the Tab after the episode has been created, the list will be blank.

To start a new document select **Create/Attach a New Document**



On the next screen choose the **Type** (name of document), complete the **Date** and any **Notes** you might want to add. Then select **Finish**.

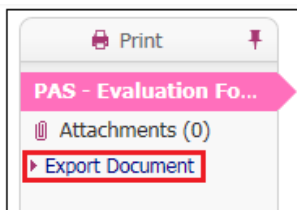


Follow the instructions below 'Exporting Documents' and 'Uploading Exported Documents' on how to download/upload documents.

- **Exporting Documents**

Some forms/documents/letters need to be sent out to clients, so in order for them to print as they show on the system there is the 'Export Document' facility. You can either complete parts of the form first or just send it out blank.

For example, within the 'Evaluation Form Following the Delivery of Adoption Support Services' form, you will see the link '**Export Document**' on the left hand side of the screen under the Print button.



Select this link and on the next screen complete the **Date**, choose the **Type** (name of form/document) and any **Notes** you might want to add. Then select **Create**.

Click **Download Document**, and select **Open** when prompted to choose Open, Save or Cancel.

You will now see the form as a Word Document and you can print as is, or complete information within as needed and save somewhere.

- **Uploading Exported Documents**

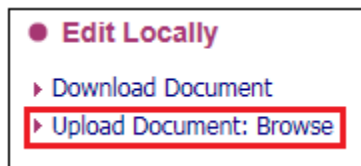
Once a form has been received back from the client (e.g. the Evaluation Form) you can upload it and attach it to the LCS form or save within the Documents tab, if you wished.

From the **Forms Tab** (only), select the relevant form you wish to attach your copy to then click on **Attachments** under the print button. If you're uploading a **Document** then follow the instructions below.

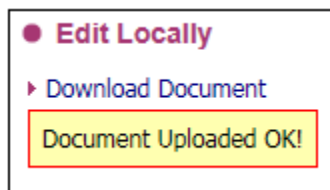
Now click on the Name of the form. DO NOT select 'Download the document' as this will download the original blank document and not your new updated version.

Attachments (1)						
Date	Category	Type	Status	Editor	Notes	Download
03-Feb-2017	RTF Export	Evaluation Form Following Delivery of Adoption Support Services	Draft	Therese Owen, ICT Analyst		Download the document
▶ Add Attachment						

Select **Upload Document: Browse**, this will allow you to now search for where you've saved your updated document as it will open the file browser.



Double click on your chosen document, your screen will refresh and you will see the following message:



Now select **Download Document** and choose **Open** when prompted to choose Open, Save or Cancel and you will now see your uploaded form, and this can be closed without saving.

Back in your LCS screen you will see the Document Details. Selecting Update Details will allow you to change information within the Document Details and add further notes if needed. Delete Draft Document and Delete do the same thing – delete what you've just uploaded, so only select these if you've added the wrong document. By selecting **Complete Document** this will now lock the document and it can only be accessed as view only and no further changes can be made.

● **Document Details**

Document Type	Evaluation Form Following Delivery of Adoption Support Services
Date	03-Feb-2017
Editor	Therese Owen - SYSTEMS ADMIN
Status	Draft
File	.rtf 2 MB (2,138 KB)
Original Filename	Evaluation.rtf
Document Number	72977

- ▶ Update Details
- ▶ Delete Draft Document
- ▶ Delete
- ▶ **Complete Document**

To view the document at any time, you will need to come back into your form, select the form under attachments and click on **View the Document (Read Only)**. Or if you've uploaded to the Documents tab, it will be listed under here.

● **Document**

- ▶ **View the Document (Read Only)**
- ▶ Copy To New Document

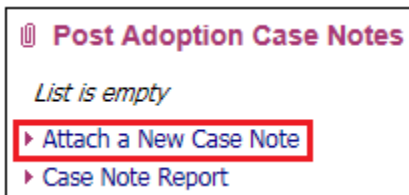
## 8. CASE NOTES TAB

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*

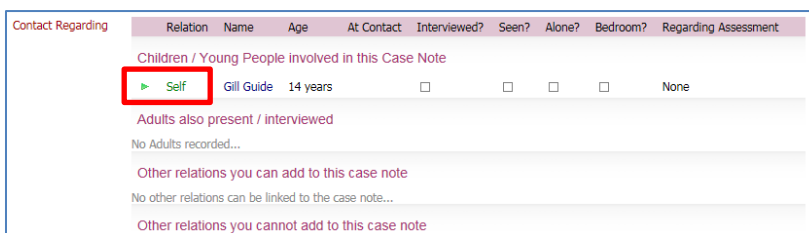
Enter the **Contact Date**, for example the date of the phone call, date of visit or date letter received

The **Type of Contact**

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.



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	<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									

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

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

### ➤ Reason for Contact

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

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

Post Adoption Case Notes								
<input type="checkbox"/>	Finalised?	Significant Event	Contact Date	Type of Contact	Contact Regarding	Reason for Contact	Created By	Status
<input type="checkbox"/>	<input type="checkbox"/> No	<input type="checkbox"/> No	03-Feb-2017	Post Adoption Case Note	Gill Guide	Reason for Contact	Therese Owen	Private
<a href="#">▶ Attach a New Case Note</a> <a href="#">▶ Case Note Report</a>								

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: Gill, Gill (14 years)  
 Contact Date: 03-Feb-2017  
 Type of Contact: Post Adoption Case Note  
 Add to Chronology: No

**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		Yes			None

Adults also present / interviewed  
 No Adults recorded...

Reason for Contact: Reason for Contact

**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 3 new options appear. Each of these options have a different functionality

**Post Adoption Case Notes**

Finalised?	Significant Event	Contact Date	Type of Contact	Contact Regarding	Reason for Contact	Created By	Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	03-Feb-2017	Post Adoption Case Note	Gill Guide	Reason for Contact	Therese Owen	Private

Publish Make Private Detach

- **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 PAS 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 PAS 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 PAS workspace

Click on the link **Case Note Report**; you can either select all PAS 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**



Show Report Cancel - Show report: Case Note Report for Guide, Gill (14 years)

**Case Note Report for Guide, Gill (14 years)**

- **Type of Contact**
  - ▶ Select All
  - Post Adoption Case Note
- **Dates**
  - Date From
  - Date To
- **Written By**
  - Worker
  - Department
- **Significant Events**
  - Significant Events only?
- **Ordering**
  - Date Descending (Show Newest First)

## 9. SERVICES TAB

Within this tab are 3 areas of service:

### 1. Letterbox Communication

Select **New Communication** and complete the relevant dropdowns/date fields. Once you have added all your information, click **Create** at the bottom of the screen.

Create New Row

Create Cancel

**Communication**

Audit

- **Create / Update Communication**
  - Type of communication sent/received
  - Date communication received
  - Date communication checked
  - Checked communication passed
  - Date communication sent
  - From / To
  - Family Member
  - Details
- Include Entry in History?

Create Cancel

## 2. Post Adoption Services

Select **New Post Adoption Services** and complete the relevant dropdowns/date fields. Once you have added all your information, click **Create** at the bottom of the screen.

The screenshot shows a 'Create New Row' dialog box with a purple header and a close button. It contains two 'Create' and 'Cancel' buttons at the top and bottom. A sidebar on the left has 'Services' selected. The main area is titled 'Create / Update Post Adoption Service' and includes the following fields: 'Service Start Date' (date picker), 'Type of Service' (dropdown), 'Review Date' (date picker), 'Service End Date' (date picker), 'Service End Reason' (dropdown), and 'Details' (text area). An 'Include Entry in History?' checkbox is at the bottom.

## 3. Contact Arrangements

Select **New Contact Arrangements** and complete the relevant dropdowns/date fields. Once you have added all your information, click **Create** at the bottom of the screen.

The screenshot shows a 'Create New Row' dialog box with a purple header and a close button. It contains two 'Create' and 'Cancel' buttons at the top and bottom. A sidebar on the left has 'Contact Arrangements' selected. The main area is titled 'Create / Update Contact Arrangements' and includes the following fields: 'Person responsible for Contact Arrangements' (dropdown), 'Contact With' (dropdown), 'Contact Due' (date picker), 'Has Contact been arranged?' (dropdown), 'Actual Contact Date' (date picker), 'Type' (dropdown), 'Location' (dropdown), 'Specific Arrangements' (text area), and 'Frequency' (dropdown). An 'Include Entry in History?' checkbox is at the bottom.

## 10. 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 Post Adoption Group so they will be able to view that workspace episode. It is also possible to restrict users from being able to view the Post Adoption Support episode, even if they are a member of the group given access

#	User/Group/Department	Administrator	Contributor	Observer	Excluded	Actions
1	Post Adoption Admin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	▼ Down <span style="color: red;">✗ Remove</span>
2	Post Adoption Contributor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	▲ Up ▼ Down <span style="color: red;">✗ Remove</span>
3	Post Adoption Observer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▲ Up <span style="color: red;">✗ Remove</span>
4	Everyone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

▶ Add New User/Department/Group Rule

## 11. 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

## 12. 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 Post Adoption Support 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

There is also an option in certain areas that will allow it to be added to the History, as below.

<input type="checkbox"/> 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
16-May-2017	Post Adoption	Document	PAS - 28 Day Letter (Restricted), Started on 16-May-2017	Q +
15-May-2017	Post Adoption	Form Draft	PAS - Evaluation Form Following Delivery of Adoption Support Services, by Therese Owen	Q +
15-May-2017	Post Adoption	Form Draft	PAS - Adoption/SGO Family Support Referral to Bucks Adoption Service, by Therese Owen	Q +
01-Feb-2017	Post Adoption	Workspace	Post Adoption Episode, Started on 01-Feb-2017	Q +
16-Jan-2017	Customer Workflow	Form Completion	Special Guardianship Support Request, by Therese Owen	Q +
16-Jan-2017	Customer Workflow	Special Guardianship Support Started	Special Guardianship Support started ( Key 199, revision 1)	Q +
02-Jan-2017	Post Adoption	Workspace	Post Adoption Episode, Ended on 02-Jan-2017	Q +
01-Jan-2017	Post Adoption	Workspace	Post Adoption Episode, Started on 01-Jan-2017	Q +
08-Nov-2016	Customer Workflow	FGC Ended	FGC ended ( Key 100, revision 3)	Q +

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**

General

Workspaces

**Legal Workspace** ( all | none )

Episode

Forms

Documents

Case Notes

Custom Fields

Records

**Young Carer** ( all | none )

Episode

Forms

Documents

Case Notes

Custom Fields

Records

**Post Adoption** ( all | none )

Episode

Forms

Documents

Case Notes

Custom Fields

Records

**CSE Workspace** ( 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

● 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	Q +	
04-Oct-2016	General Events	Date of Birth change	Date of Birth changed from 03-Oct-2006 to 03-Oct-2001	Q +	
<input checked="" 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 +	

**CSE Workspace** ( all | none )

Episode

Forms

Documents

Case Notes

Custom Fields

Records

