



Internal Ref:	NELC-CNLL-001
Review date	August 2021
Version No.	V01.00

## **Liquidlogic – Adding a Case Note**

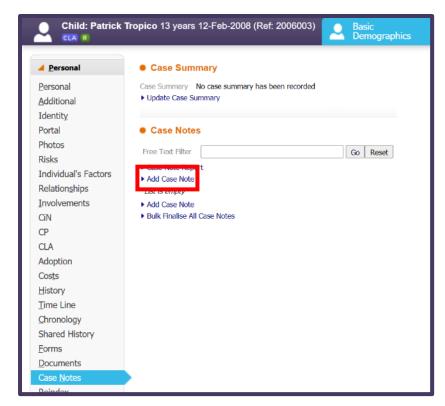
BACKGROUND INFORMATION	
Subject	Liquidlogic
Document Purpose	Training Guide
Reference and Version	NELC-CNLL-001
Target Audience	Liquidlogic Users
Author	Adam Brown
Last Review	10/08/2021
Copyright	North East Lincolnshire Council





## Adding a Case Note

To add a basic case note, access the child's **Basic Demographics** page and click on **Case Notes** from the left-hand side.



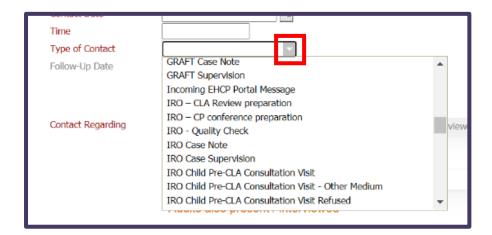
Any existing case notes will appear in this section. This example does not contain any case notes.

If there were many case notes, you can search for specific ones by typing key words into the **Free Text Filter** box.

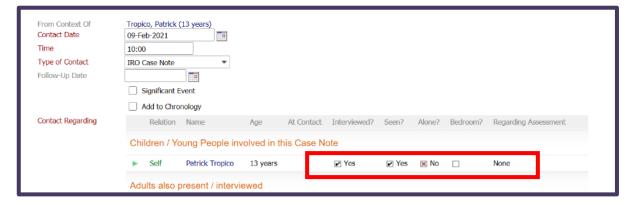
Click Add Case Note.

Complete as much detail as you can. Anything in red is mandatory.

Click in the drop-down menu next to **Type of Contact** to select the appropriate type.



In the **Contact Regarding** section, the checkboxes allow you to click on them <u>once</u> which will enter a tick and add the word 'Yes'. If you click on the same checkbox <u>twice</u>, it will place a cross in the box and the word 'No' will appear next to the checkbox.



You can add another person to the case note by clicking on the square box to the left of their name or by clicking on the green plus symbol to the right of their name.



If you hover over the green triangle symbol, a pop-up will appear to inform you that the case note is viewed from the context of the person that has the green triangle symbol to the left of their name.



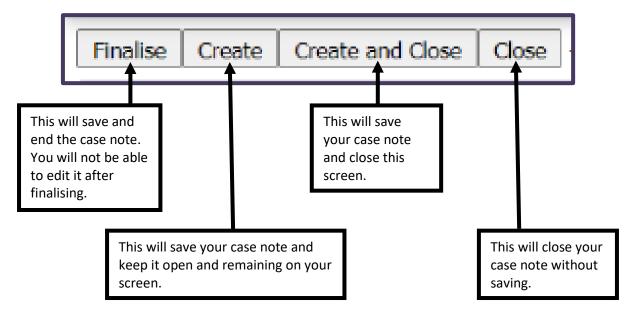


You can change the context by clicking in the square boxes to the left of someone else's name.



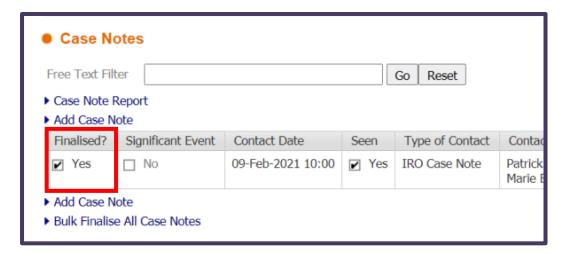
After all information has been input, it is time to save the case note.

The options for saving the case note are on the top left-hand side of your screen.



For this demonstration, we will click on Finalise.

You should now be back in the child's demographics case notes section. From here, we can see that the case note has been finalised. It would not be ticked as finalised if we had chosen **Create** or **Create** and **Close**.



If we click on the created case note, you will be presented with the following screen. If you wish to add an attachment, you would click on the **Attachments** link.



In the next screen, click on the link to **Add Attachment**. You can then locate the document you wish to attach to the case note.

