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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
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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.

Child: Patrick Tropico 13 years 12-Feb-2008 (Ref: 2006003) Basic Demographics

Personal

- Personal
- Additional
- Identity
- Portal
- Photos
- Risks
- Individual's Factors
- Relationships
- Involvements
- CIN
- CP
- CLA
- Adoption
- Costs
- History
- Time Line
- Chronology
- Shared History
- Forms
- Documents
- Case Notes**
- Reminder

Case Summary

Case Summary No case summary has been recorded

► Update Case Summary

Case Notes

Free Text Filter Go Reset

► Add Case Note

► Add Case Note

► Bulk Finalise All Case Notes

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.

Time

Type of Contact

Follow-Up Date

Contact Regarding

GRAFT Case Note

GRAFT Supervision

Incoming EHCP Portal Message

IRO - CLA Review preparation

IRO - CP conference preparation

IRO - Quality Check

IRO Case Note

IRO Case Supervision

IRO Child Pre-CLA Consultation Visit

IRO Child Pre-CLA Consultation Visit - Other Medium

IRO Child Pre-CLA Consultation Visit Refused

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

From Context Of: Tropico, Patrick (13 years)

Contact Date: 09-Feb-2021

Time: 10:00

Type of Contact: IRO Case Note

Follow-Up Date:

☐ Significant Event

☐ Add to Chronology

Contact Regarding

Relation	Name	Age	At Contact	Interviewed?	Seen?	Alone?	Bedroom?	Regarding Assessment
Children / Young People involved in this Case Note								
Self	Patrick Tropico	13 years		<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/>	None
Adults also present / interviewed								

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.

☐ Add to Chronology

Contact Regarding

Relation	Name	Age	At Contact	Interviewed?	Seen?	Alone?	Bedroom?	Regarding Assessment
Children / Young People involved in this Case Note								
Self	Patrick Tropico	13 years		<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/>	None
Brother	Thunder Tropico	13 years		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None
Adults also present / interviewed								
Mother	Lois Tropico	28 years		<input type="checkbox"/>	<input type="checkbox"/>			
Other relations you can add to this case note								
Carer	Dean Barron	58 years						
Carer	Marie Barron	59 years						

Reason for Contact: test of the test of the test

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.

Relation	Name	Age	At Contact
Children / Young People involved in this Case Note			
Self	Patrick Tropico	13 years	
Adults also present / interviewed			
Mother	Lois Tropico	28 years	
Carer	Marie Barron	59 years	

Reason for Contact: test of the test of the test

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

The diagram shows two side-by-side screenshots of a user interface. The left screenshot shows a list with 'Self' selected for Patrick Tropic (13 years) and 'Brother' selected for Thunder Tropic (13 years). A red arrow points to the right screenshot, where 'Brother' is now selected for Patrick Tropic and 'Self' is selected for Thunder Tropic.

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.

The diagram shows a horizontal bar with four buttons: 'Finalise', 'Create', 'Create and Close', and 'Close'. Below each button is a text box explaining its function:

- Finalise:** This will save and end the case note. You will not be able to edit it after finalising.
- Create:** This will save your case note and keep it open and remaining on your screen.
- Create and Close:** This will save your case note and close this screen.
- Close:** This will close your case note without saving.

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**.

The screenshot shows the 'Case Notes' section of a web application. It includes a 'Free Text Filter' with 'Go' and 'Reset' buttons. Below are links for 'Case Note Report' and 'Add Case Note'. A table displays case notes with columns: 'Finalised?', 'Significant Event', 'Contact Date', 'Seen', 'Type of Contact', and 'Contact'. The first row shows a case note for Patrick Marie B. with 'Finalised?' checked (Yes), 'Significant Event' as 'No', 'Contact Date' as '09-Feb-2021 10:00', 'Seen' checked (Yes), and 'Type of Contact' as 'IRO Case Note'. Below the table are links for 'Add Case Note' and 'Bulk Finalise All Case Notes'.

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.