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Liquidlogic – Create a Contact

BACKGROUND INFORMATION	
Subject	Liquidlogic
Document Purpose	Training Guide
Reference and Version	NELC-COLL-001
Target Audience	Liquidlogic Users
Author	Adam Brown
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Create a Contact

After finding or creating the person, you will be taken to their **Basic Demographics**. Find and click on the link titled **Create a new contact** which is located under the **Actions** heading.

The screenshot shows the 'Basic Demographics' page for a user named 'Test Ehm, 8 years (Case No: 2005943)'. The page is divided into several sections:

- Personal:** Includes fields for Case Number (2005943), Title, Surname (Ehm), Forename (Test), and Gender (Female).
- Age / Date of Birth:** Includes fields for Actual DOB (15-Dec-2012), Age (8 years), and a checkbox for 'Unborn Child'.
- Status Details:** Includes a field for Marital Status.
- Other Names:** Includes a field for 'Add Other Name' and a checkbox for 'Mark this Record as a Duplicate'.
- Addresses:** Includes a field for 'Primary Address' (3 Hendron Mews, Grimsby, DN32 8HU) and a link for 'Address History / Update Addresses'.
- Locality:** Includes a field for 'Locality' and a link for 'Locality Notes'.
- Contact Methods:** Includes a link for 'Add Contact Number / View Historic Numbers...' and a link for 'Show Relevant Contact Methods'.
- E-Mail:** Includes a checkbox for 'Is Disabled?' and a checkbox for 'Is on a Disability Register?'.
- Disability:** Includes a checkbox for 'Is Disabled?' and a checkbox for 'Is on a Disability Register?'.
- Important Information:** Includes a yellow box stating 'No NHS Number recorded' and a link for 'Consent to information sharing is not recorded'.
- Consent to Information Sharing:** Includes a link for 'Update Consent to Information Sharing'.
- Start New Pre-Assessment Form:** Includes a dropdown menu and a 'Start' button.
- Actions:** Includes a link for 'Create a new Contact' (highlighted with a red box), a link for 'Create a new Early Help Episode', and a link for 'New Document'.
- Relationships:** Includes a link for 'Test Ehm - 8 years This Child'.

A pop-up may appear asking if you wish to proceed. If it does, click on **OK**.

Are you sure you want to create a new Contact?

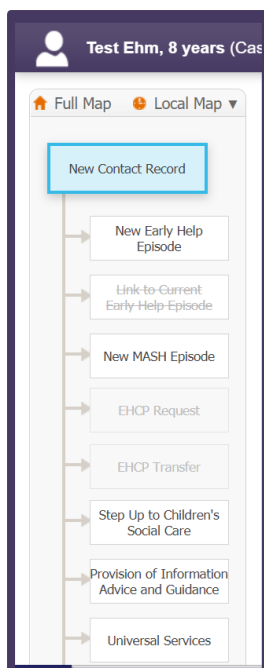
OK

Cancel

This will start the contact process.

The screenshot shows the 'Contact - New Contact Record Received' page. The page is divided into several sections:

- Task Details:** Includes a task assigned to Adam Brown, started on 21-Dec-2020, and due on 22-Dec-2020. The task is titled 'Contact Record' and 'Task Details'.
- The Contact Record has not been started:** Includes a link for 'Start Contact'.
- Family Pathways:** Includes a table of related persons to start a grouped contact. The table has columns for Relationship, Name, Age, and Info. The first row is 'Self' (Test Ehm, 8 years) and the second row is 'Automatically included in group'.
- Click Here to Update Relationships for Test Ehm...**



On the left-hand side of your screen is the pathway for the **New Contact Record**. If an item is in blue, it signifies that this part of the pathway is in process and is not complete. Items in white have not been initiated and items in grey indicate that a pathway element has been completed.

Contact - New Contact Record Received

Active Task: Adam Brown (Reassign) Started: 21-Dec-2020 Due: 22-Dec-2020

Contact Record Task Details No Other Children ▼

The Contact Record has not been started.

Start Contact

Family Pathways - You may use the following table of related persons to start a grouped contact. Any selected persons will be included in the contact group and the contact assessments will be edited as one.

<input type="checkbox"/>	Relationship	Name	Age	Info
<input checked="" type="checkbox"/>	Self	Test Ehm	8 years	Automatically included in group

► Click Here to Update Relationships for Test Ehm...

From here you can click on **Start Contact** to begin the form, however, if you need to include information for multiple children within the family, then you will need to click on the tickbox next to each child listed. You can also add relationships from this screen if you have not entered them earlier.

After clicking on **Start Contact**, you will be presented with a screen like this one.

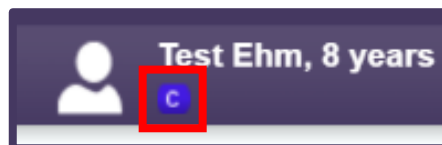
Information **Record** Consolidation Revisions

Copy Forward - There are no previous Records for Ehm, Test (8 years), so you do not have the option to copy answers forward at this time. Click 'Start Blank' to start the new Record.

Start Blank

As this is a new child that we have inputted into the system, there are no previous records so we can click on **Start Blank** to proceed. If records did exist for this child, they would appear here with a tick box option to select the records we wished to copy forward onto this contact.

You may notice that a new icon has appeared underneath the child's name. If you hover your mouse pointer over this, you will be informed what the icon means. In this case, it is informing us that a contact record has begun.



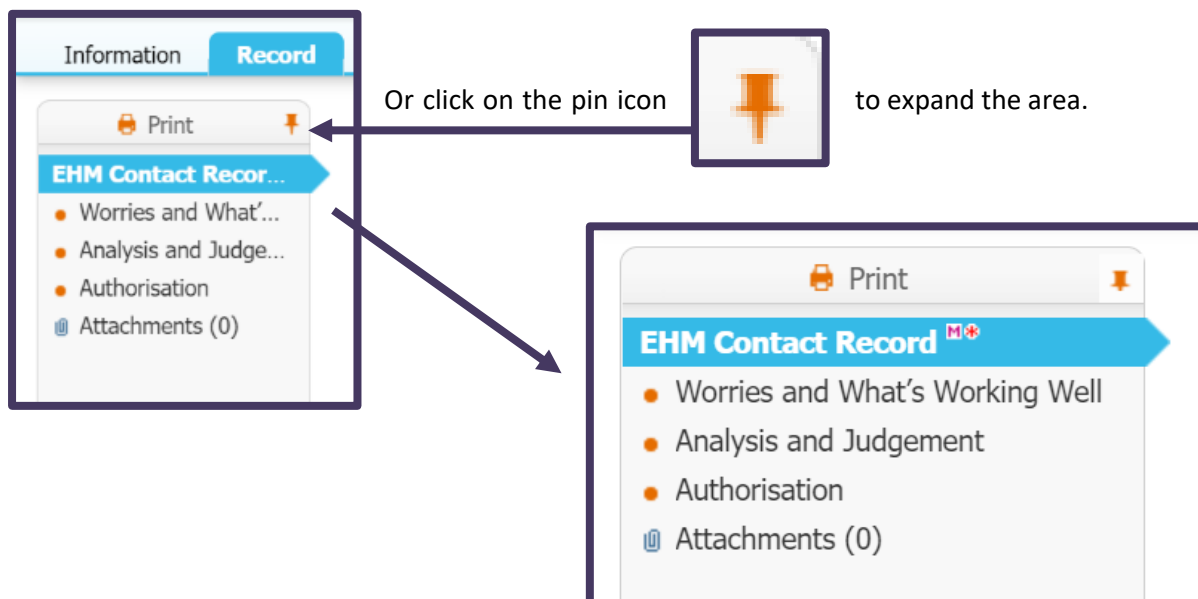
You should now follow the process outlined in the form. Consider this a script that is advisable that you read and adhere to as you are conducting the contact. Items in **red** must be completed.

For the Date of Contact field, after inputting a date, add a space after the year and then input the exact time that the contact started. This ensures we have accurate times recorded.

You should complete as much as you can in this first screen (**EHM Contact Record**) and then you can move on to the next area (**Worries and What's Working Well**) and keep following the process throughout each section on the left-hand side. Remember that any areas in **red** text must be completed.

If you want to know what the phrases say in full, you can either hover your mouse pointer over them –





A date and time must also be entered in the **Analysis and Judgement** section.

The process will differ depending on what you select from the **Suggested Outcomes** area.

Once you have completed the record, proofread and check your text and then click on **Save** in the top right of your screen IF you are not ready to finalise the record OR click on **Finalise Record** which will save the contact information to the child's record.

A pop-up may appear asking you to confirm that you wish to finalise. Click on **OK**.