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Liquidlogic – General Notes

BACKGROUND INFORMATION	
Subject	Liquidlogic
Document Purpose	Training Guide
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Target Audience	Liquidlogic Users
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General Notes

General Notes are used to record attendance at a group or where basic information, advice or guidance has been offered to a family that does not have an open Contact or Early Help Episode. This would only be used for basic information - as anything more substantial would require a Contact Record to be completed. **It is possible to add case notes in EHM and we will look at this shortly.**

When in **EHM**, to add a general note, access the child's **Basic Demographics** page and click on **General Notes** from the left-hand side.

The screenshot shows the 'Basic Demographics' page for a child named 'Test Ehm, 8 years (Case No: 2005943)'. The left-hand navigation menu includes 'Personal', 'General Notes', 'Imports', 'History', 'Time Line', 'Chronology', 'Shared History', and 'Costs'. The 'General Notes' section is active, showing a 'General Case Summary' and a 'General Notes' section. The 'General Notes' section has a 'Free Text Filter' and a red box around the 'Add General Note' button. Below the button, it says 'List is empty'. There is also an 'Add General Note' link below the button.

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

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

Click **Add General 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.

The screenshot shows the 'Type of Contact' dropdown menu. The dropdown is open, showing a list of contact types: Home Visit, Hub Visit, Information Advice and Guidance, Management Decision, Managers Audit Oversight, Meeting, Parent-Child Parallel Group, Parenting Group, Telephone call, Text message, Vulnerable Young Person Group, and Adults also present / interviewed. The 'Type of Contact' label is highlighted with a red box.

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.

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 general 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	
Brother	Thunder Tropico	13 years	

Adults also present / interviewed

Mother	Lois Tropico	28 years	
Carer	Marie Barron	59 years	

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

Children / Young People involved in this Case Note

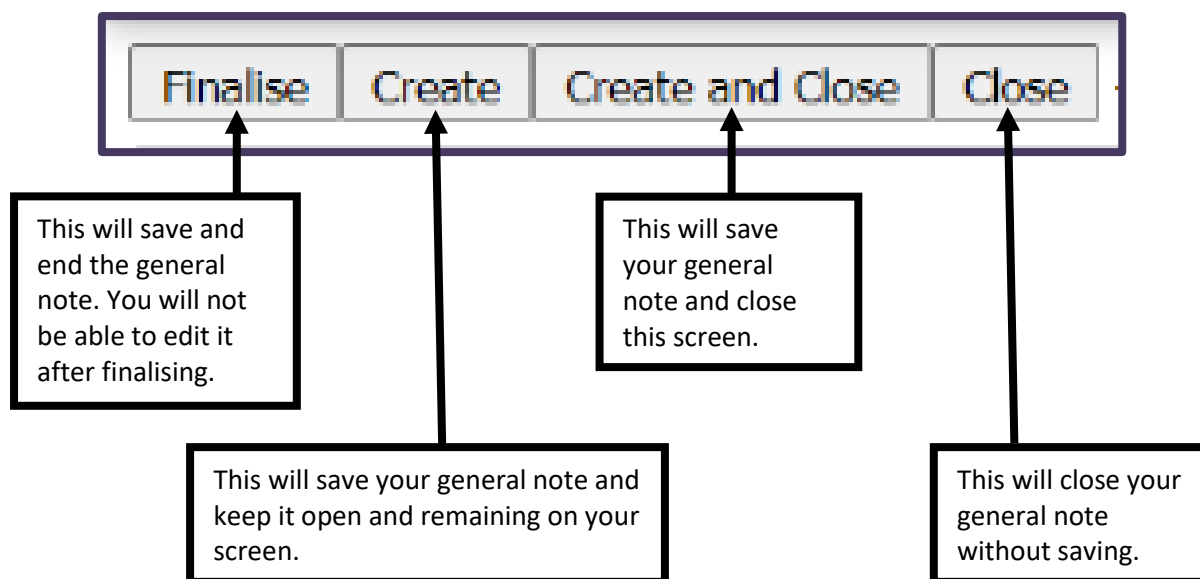
Self	Patrick Tropico	13 years
Brother	Thunder Tropico	13 years

Children / Young People involved in this Case Note

Brother	Patrick Tropico	13 years
Self	Thunder Tropico	13 years

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

The options for saving the general 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 general notes section. From here, we can see that the general note has been finalised. It would not be ticked as finalised if we had chosen **Create** or **Create and Close**.

The screenshot shows the 'General Notes' section. On the left is a sidebar with various menu items. The main area has a 'General Notes' heading with a note about its context. Below this is a 'General Note Report' table. The 'Finalised?' column has a checked box for 'Yes' and an unchecked box for 'No'. Below the table is an 'Add General Note' button. Below the table is an 'Episodic Case Notes' section with a 'Free Text Filter' and 'Go' and 'Reset' buttons.

Finalised?	Significant Event	Contact Date	Seen	Contact Type	Contact Regarding	Reason for Contact	Att.	Created By
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	26-Jul-2021 10:00	<input checked="" type="checkbox"/> Yes	Vulnerable Young Person Group	Test Ehm	test		Adam Brown

The screenshot shows the 'Part 1 - Contact' section. On the left is a sidebar with 'General Note', 'Restricted Access', 'Audit', and 'Attachments (0)'. The main area shows details for 'Test Ehm' including 'From Context Of', 'Contact Date', 'Time', 'Contact Type', 'Add to Chronology', and 'Contact Regarding'. Below this is a table for 'People involved in this General Note'.

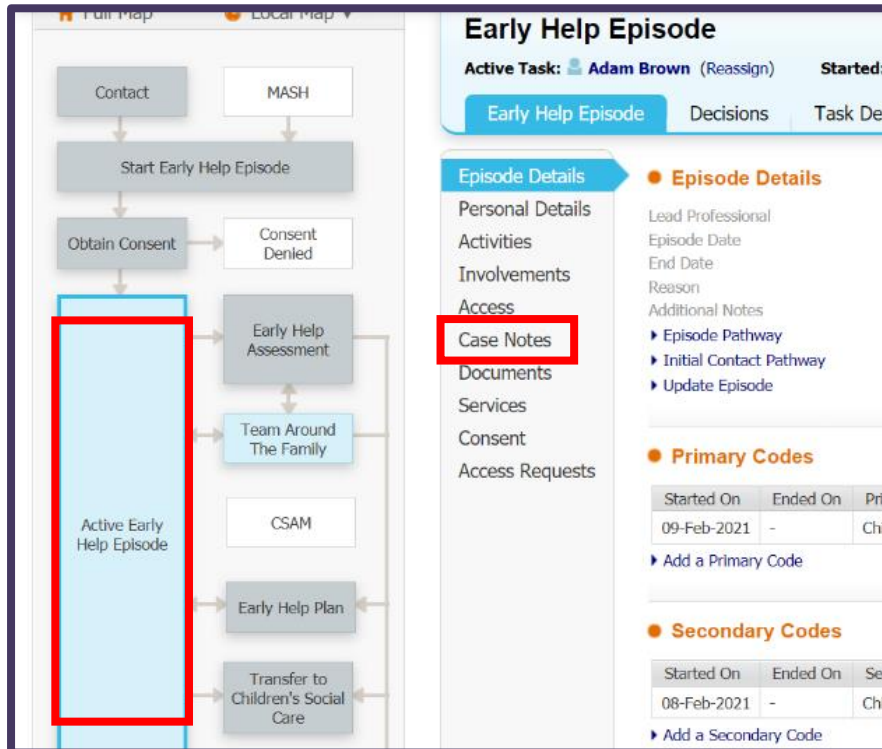
Relation	Name	Age	At Contact	Inter
Self	Test Ehm	8 years	8 years	Yes

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

The screenshot shows the 'Attachments (0)' section. On the left is a sidebar with 'General Note', 'Restricted Access', 'Audit', and 'Attachments (0)'. The main area shows 'Attachments (0)' with a red box around the 'Add Attachment' button.

Case Notes in EHM

You can add case notes when in EHM. To do this, you must be within the **Active Early Help Episode** from the map.



When on the **Early Help Episode** tab, click on the **Case Notes** link.

Note that you can view any general notes from here by clicking on them from the table under the **Person General Notes** heading. These general notes are not attached to the early help episode. Click on **Add Case Note**.

The screenshot shows the 'Case Notes' section. On the left, the 'Case Notes' link is highlighted in the sidebar. The main content area shows a 'Free Text Filter' with 'Go' and 'Reset' buttons. Below this, the 'Add Case Note' button is highlighted with a red rectangle. The 'Person General Notes (not attached to this episode)' section is also visible, showing a table with columns: Finalised?, Significant Event, Contact Date, Seen, and Contact Type. The table contains one row of data.

Finalised?	Significant Event	Contact Date	Seen	Contact Type
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	26-Jul-2021 10:00	<input checked="" type="checkbox"/> Yes	Vulnerable Young

Once you have created the case note and finalised or create and closed, you will be taken back to this screen. You can click on the case note/s by selecting them from the table under the **Case Notes** heading. Any case notes recorded from within an Active Early Help Episode are directly linked to the episode.

Case Notes

Free Text Filter Go Reset

► Case Note Report

► Add Case Note

Finalised?	Significant Event	Contact Date	Seen	Contact Type
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	03-Aug-2021 11:00	<input checked="" type="checkbox"/> Yes	Early Years Group

► Add Case Note

Person General Notes (not attached to this episode)

Free Text Filter Go Reset

Finalised?	Significant Event	Contact Date	Seen	Contact Type
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	26-Jul-2021 10:00	<input checked="" type="checkbox"/> Yes	Vulnerable Young Person

If we go back to the **General Notes** link within a child's basic demographics, you will be able to view the case note/s by clicking on them from the table underneath the **Episodic Case Notes** heading.

General Case Summary

General Case Summary No case summary has been recorded

► Update General Case Summary

General Notes

Note: If this person is involved in a Case Note which was created within the context of an episode of another child, it will appear as a General Note in this area only if:

- This person did not have an open episode at the time.
- You have access to the episodes of all involved children.

Free Text Filter Go Reset

► General Note Report

► Add General Note

Finalised?	Significant Event	Contact Date	Seen	Contact Type	Contact Regarding	Reason for Contact	Att.	Created By
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	26-Jul-2021 10:00	<input checked="" type="checkbox"/> Yes	Vulnerable Young Person Group	Test Ehm	test		Adam Brown

► Add General Note

Episodic Case Notes

Free Text Filter Go Reset

Finalised?	Significant Event	Contact Date	Seen	Contact Type	Contact Regarding	Reason for Contact	Att.	Created By	Attached To
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	03-Aug-2021 11:00	<input checked="" type="checkbox"/> Yes	Early Years Group	Test Ehm	test		Adam Brown	Early Help Episode of 04-Jan-2021