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.

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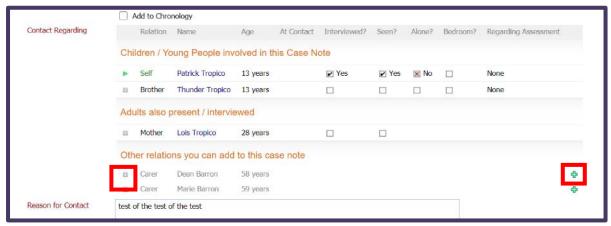
Click in the drop-down menu next to **Type of Contact** to select the appropriate type.

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.

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.

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.
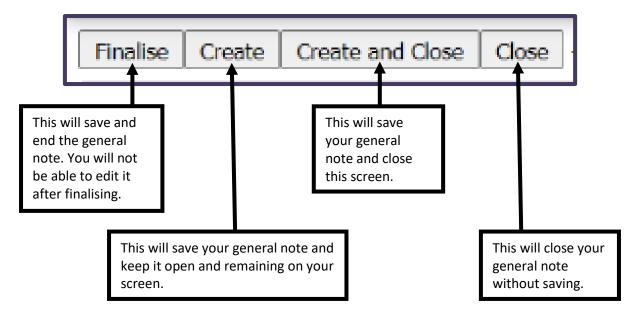

You can change the context by clicking in the square boxes to the left of someone else's name.

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

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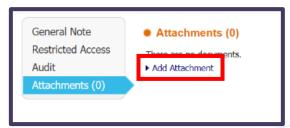

Finalise | **Create** | **Create and Close** | **Close**

This will save and end the general note. You will not be able to edit it after finalising.

This will save your general note and keep it open and remaining on your screen.

This will save your general note and close this screen.

This will close your general note without saving.

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**.
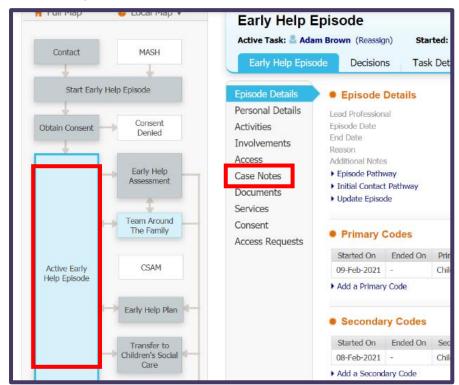

If we click on the created general note, you will be presented with the following screen. If you wish to add an attachment, you would click on the **Attachments** link and then **Add Attachment**.
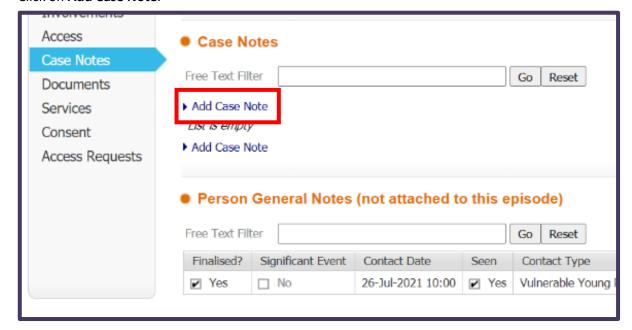
Case Notes in EHM

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**.

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.

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.