

EHM Case Notes

Document History

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Case Notes

Case Notes are accessed via the Active Episode box of the pathway.



Case notes appear in the left-hand menu of the Active Episode screen.

Liquidlogic ECAF TRAIN	Home Help Menu v System v Find v Mrs Lynn Parsons (0) v Q
Joseph Carney, 5 years (Ca	ase No: 1008870) 🚨 🔅 🕰 🔁
Full Map ● Local Map ▼ Contact Episode Started Obtain Consent Cafe Assessment CaF Assessment CaF Assessment Cafe Active Episode Contributions Meeting Step up to Social Care Episode Completed	Active CAF Episode Active Task: Mrs Lynn Parsons (Ressign) Started: 24-Feb-2015 Due: Unspecified Active CAF Episode Decisions Task Details All Children (2) • Episode Details • Case Summary No case summary has been recorded Forms • Update Case Summary No case summary has been recorded Active CAF Episode • Case Notes • Case Notes Documents • Case Notes • Case Note Services • Add Case Note • Add Case Note Access Requests • Person General Notes (not attached to this episode) Lst is empty • Lst is empty

The Case Note tab lists all saved and finalised case notes. This tab also provides the ability to create a new case note, update an un-finalised case note, filter the list of case notes based on the entered free text criteria or produce case note reports.

Add new Case Note

Select the Case Notes tab and click Add Case Note

Active Task: 💄 Lynn I	Parsons (Reassign)	Started: 23-Jan	-2017 Due: ur	nspecified
Active CAF Episod	e Decisions	Task Details	No Other Chi	ldren 🔻
Episode Details	• Case Summa	ry		
Personal Details	Case Summary	No case summa	ry has been recorde	d
Forms	• Update Case Summ			
Activities				
Involvements	Case Notes			
Access	Free Text Filter			Go Reset
Case Notes				Go Reset
Documents	<i>List is empty</i> Add Case Note			
Services				
Consent	Person Gener	ral Notes (not a	ttached to this	enisode)
Access Requests	· Ferson Gener	a notes (not a	tached to this	episodej

The Case Note screen will be displayed:

opuate case note mulvidua	al: Jimmy Woods		
Case Note Individual		Notify	
Individual's Name Jimmy Woods	ridual is a Child / Young Person	Users to be Notified	Notify Role(s) Case Worker (Lynn Parsons)
Interviewed?	Please tick if 'Jimmy Woods' was interviewed Interviewed? Yes No Please tick if 'Jimmy Woods' was seen during the interview		Notify User(s) Mr Allan Glennon, EIP Assessment Lead (Your Supervisor) Jacqueline Kerr (Your Manager) Select another user to be notified
Seen During Interview?	◯ Yes ◯ No		
Seen Alone?	◯ Yes ◯ No		
Seen Bedroom?	🔿 Yes 🔘 No		
Interview Concerning			
 Interview concerning 			

Use the **checkboxes** to indicate if the child/young person was interviewed and/or seen during the interview.

Use the **Notification checkboxes** (on the right-hand side) to specify which user/role will be notified about the case note.

You can use the **Select another user** to be notified link to manually specify another user from the Address Book to be notified about this case note.

Once the above information has been completed click on the **Update** button at the top of the screen.

The next screen displayed is in two parts:

- Part 1 Contact
- Part 2 Write Up

ontact Date	Jinny	Woods									
ontact Type											•
	_ s	ignificant Ev	vent								
		dd to Chron	ology								
Contact Regarding		Relation	Name	Age	At Contact	Interviewed?	Seen?	Alone?	Bedroom?	Regarding Assessment	
	Chi	ildren / Yo	oung People involv	ed in	this Case I	Note					
			Jimmy Woods	-		✓ Yes	✓ Yes	✓ Yes		None	
	Ad	ulte also r	oresent / interviewe	be							
		dults record		cu							
	Oth	ier relatio	ns you can add to	this c	ase note						
			Mary Woods	-							ф
	•	Self	Mr STEPHEN BYRNE	-							÷
		Mother	Mrs MARY BYRNE	-							÷
		Father	Mr COLIN BYRNE	-							ф
eason for Contact											
Detailed Note	s										
etailed Notes											
claned Notes											

Part 1 – Contact

- The **From Context of** section at the top of the case note displays the name of the child/young person which the case note is about
- Enter the **Contact Date**. This is blank as default
- Choose a **Contact Type** from the drop down selection and then tick the box if this is a significant event AND/OR should be added to Chronology
- **Contact Regarding** displays the name of the child/young person involved in the case note and whether they were interviewed and/or seen during the interview.

<u>NOTE</u>: You can click on the details of the child/young person involved in this case note to update whether this person was interviewed/seen during the interview etc.

- Other relations can be identified as involved in the case note. If other relations are displayed you can select these family members and the case note will be added to their record as well as the current child. <u>NOTE</u>: If the family member selected does not have an open episode then the note will be recorded as a General Note and will be displayed outside of the episode and viewable by anyone accessing the child/young person's record.
- Enter a **Reason for Contact** enter a brief description
- **Detailed Notes -** Enter more detailed information about the case note.

• Part 2 - Write	Up
Analysis of information	
Management Decision	
Action	B / U AAAA X

Part 2 – Write Up

Into each of the fields type the relevant information.

Once all the information has been entered into the case note click on **Finalise Case Note** under the Actions Section.



You will be prompted to confirm you wish to Finalise the Case Note:-



Note: If you have need to save the case note and add further information later then click on the **Create** link at the top of the page as this will enable you to return to the Case Note and finalise later.

Case Note Alerts

If the creator of a case note selected another user to be notified of the case note, an alert will appear in the notified user's worktray, see example below:

	No Due Date	Geet 🛛 💋	Jimmy Woods, 7 years [Case No: 1019411]	A	Case Notes - This child has been added to a Case Note by Lynn Parsons
--	-------------	----------	---	---	---

• Click on the Case Note Notification

Alert Deta	ils						
Date Issued 23	-Jan-2017 14:31						
Assigned Ly	nn Parsons						
Subject Ca	ase Notes						
escription Th	nis child has been a	added to a Case	Note by Lynn Parso	ons			
View Case Not	e						
Alert Complete	d .						
Alert Complete	5 U						
All Alerts Com	pleted						
All Alerts Com	pleted						
All Alerts Com	pleted						
All Alerts Com Reassign Alert	pleted						
All Alerts Complete All Alerts Comp Reassign Alert Other Ale Date Issued	rts	Assigned	Task Assigned	Subject	Description	Person	Form

• Click Alert Completed to remove the notification from the worktray

Free Text Filter

Free Text Filter on the Case Notes main screen allows the user to input free text and filter the list of case notes to only show case notes which contain the specified free text.

• Enter text in the Free Text Filter field and then click Go

Case Notes	5			
Free Text Filter		Go	Reset	

EHM will filter the list of case notes accordingly and only display case notes which contain the specified text.

Click **Reset** to display all case notes and remove the filter.

Viewing a Case Note

From the Case Notes list, click on the required case note to view it

ree Text Fi			Go	Reset		
Case Note						
Add Case N Finalised?	Significant Event	Contact Date	Contact Type	Contact Regarding	Reason for Contact	Created By
Finaliseur	Significant Event	Contact Date	contact type	Contact Regarding	Reason for Contact	Created by
Yes	□ No	24-Feb-2015	ECAF - Case Notes	Joseph Carney	This is a training test	Mrs Lynn Parsons

NOTE: Case notes appear in the order they were created e.g. if three are created on the same day, then the oldest will appear at the bottom and the newest will appear at the top

Case Note Audit

The **Audit** tab displays when and by whom the case note was created, modified, finalised and if anyone else was notified.

From the Case Notes list click on a case note to view it and select the **Audit** tab from the right-hand side to reveal the audit details

Case Note	Created	
Audit	Created Date	
Attachments (0)	Created By Creator's Dept	Lynn Parsons Triage Team
	Modified	
	Modified Date Modified By	23-Jan-2017 14:33 Lynn Parsons - Triage Team
	• Finalised	
	Finalised Date Finalised By Finalised Dept	
	Notified	
	Notified	Lynn Parsons

Case Note Report

• From the Case note screen click the Case Note Report link

Liquidlogic	ECAF TRAIN	١		Home H	ielp Menu 🔻	System ▼ Find ▼	Mrs Lynn Parsons (
Joseph Carr	ney, 5 years ((Case No: 1008	370) 🚨	🌣 🐣 🖻	Episode 2015	24-Feb-		
Episode Details Personal Details Forms Activities Involvements Case Notes Documents Services	Case Summary Case Summary No case summary has been recorded Update Case Summary Case Notes Free Text Filter Go Reset Add Case Note Report Add Case Note							
Consent	Finalised?	Significant Event	Contact Date	Contact Type	Contact Regarding	Reason for Contact	Created By	
Access Requests	Ves	No No	24-Feb-2015 17-Feb-2015	ECAF - Case Notes ECAF - Case Notes	Joseph Carney Joseph Carney	This is a training test This is for training purposes	Mrs Lynn Parsons Mrs Lynn Parsons	
	Add Case Note							
	Persor List is empty		es (not attac	hed to this epis	sode)			

You will be prompted to decide which type of case notes they wish to view using defined criteria:

Type of Contact	Dates
Select All	Date From
Education Notes	Date To
Other	
	Written By
	Worker
	Department
	Significant Events
	Significant Events only?
	Ordering

- Dates From and To can be entered in the dates fields, if required
- Use the **Click here to select** a user link to specify which user or department has created the case note, if required
- You can choose to order the case notes so the newest case notes appear first by clicking on the tick box for Date Descending
- Once all of the information has been entered click Show Report

A screen similar to the following will be displayed:

			Confidential Informa	tion			
Child ID	1008870						
Contact Date Reason for Contact Detailed Notes Analysis of Information Action	Tuesday 17 February, 2015 This is for training purposes This is for training purposes This is for training purposes This is for training purposes	Type of Contact	ECAF - Case Notes	Created By	Mrs Lynn Parsons	Finalised on	Not Finalised
Contact Date Reason for Contact Detailed Notes Analysis of Information Action	Tuesday 24 February, 2015 This is a training test This is for training purposes This is for training purposes This is for training purposes	Type of Contact	ECAF - Case Notes	Created By	Mrs Lynn Parsons	Finalised on	Tuesday 24 February, 2015

From this screen you can create a **printable view** ready to print out or create a **PDF version** by clicking the relevant selections at the top.