



LCS / Creating a Contact

Liquidlogic Children's Systems (LCS)

Author: S. Allwright

Date: 24.05.2016

DOCUMENT HISTORY

DATE	PRODUCED BY	DOCUMENT VERSION	COMMENTS
24.05.2016	S.ALLWRIGHT	1.0	INITIAL VERSION
28.02.2022	S. WEBB	1.1	REDESIGN

TABLE OF CONTENTS

1.	COURSE OVERVIEW.....	1
2.	CREATE A CONTACT RECORD.....	2
2.1.	CREATING A CONTACT RECORD	2
3.	COMPLETING A CONTACT RECORD	3
3.1.	CANCELLING A CONTACT RECORD	4
3.2.	NAVIGATING AROUND THE CONTACT RECORD.....	5
3.3.	FILLING OUT THE CONTACT RECORD	6
3.4.	ATTACHING DOCUMENTS.....	7
3.5.	EXPORTING A DOCUMENT	9
3.5.1.	<i>Completing Alerts.....</i>	<i>11</i>
4.	FINALISING THE CONTACT RECORD	12

1. COURSE OVERVIEW

This guide has been specifically designed for the Children & Young People Service who are required to record Contact Records.

By the end of this guide you will be able to:

- Create a Contact Record
- Complete a Contact Record
- Add Attachments
- Export Documents
- Send a Contact Record for authorisation

COURSE PREREQUISITES

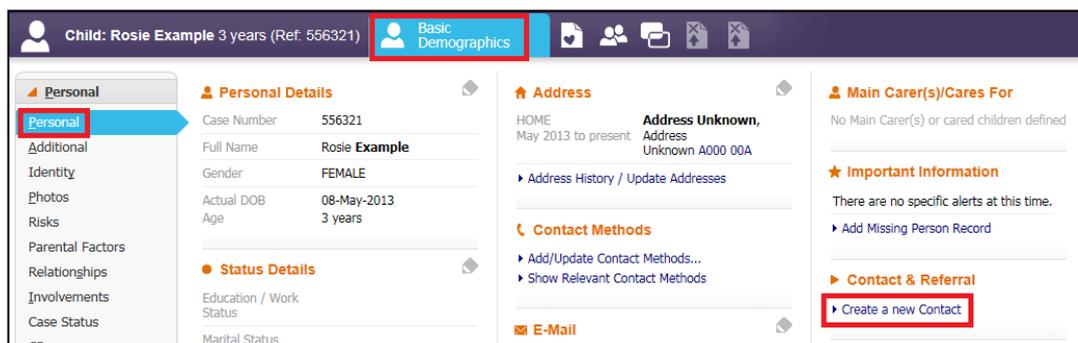
Viewing MeLearning modules.

2. Create a Contact Record

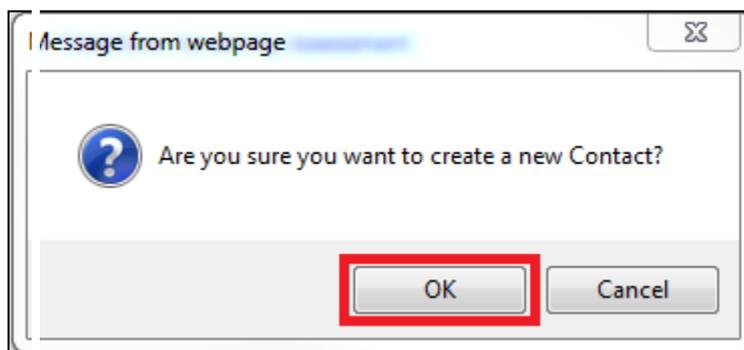
Before creating a contact record you must ensure that you search LCS thoroughly. Once you have search LCS you can create the new record where necessary. Please see the **ICS Quick Reference Guides for Searching and Creating a Person** for guidance on searching for a record on LCS.

2.1. Creating a Contact Record

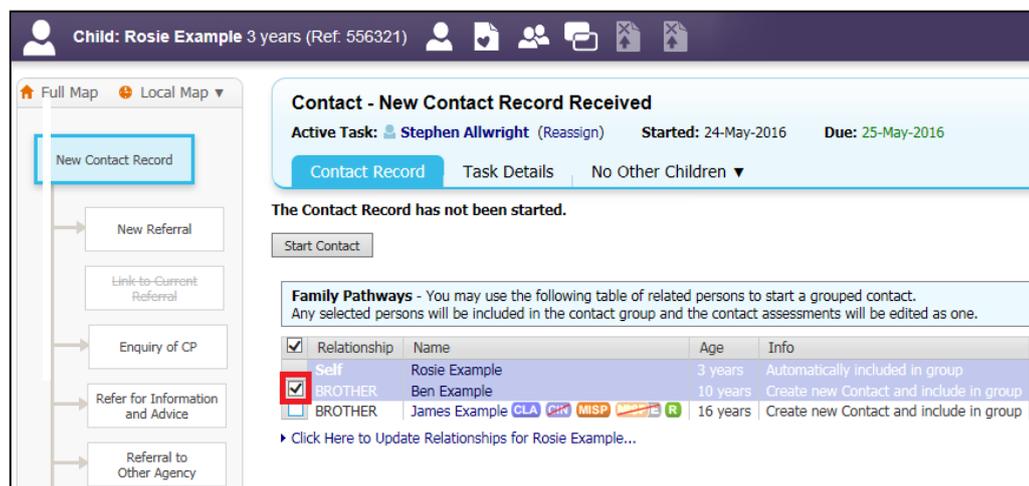
- Click on the 'Create a New Contact' link from within the Personal tab of Basic Demographics.



- A pop up appears asking you to confirm if you wish to create a new contact. Select "OK" to confirm or "Cancel" to abort.



- Next click the box next to the child's name that needs to have a Contact Record started.



- If any siblings already have an OPEN referral (Green R flag), then the Contact should only be recorded against those without an Open Referral and that the detail is relevant to.

<input checked="" type="checkbox"/>	Relationship	Name	Age	Info
<input checked="" type="checkbox"/>	Self	Rosie Example	3 years	Automatically included in group
<input checked="" type="checkbox"/>	BROTHER	Ben Example	10 years	Create new Contact and include in group
<input type="checkbox"/>	BROTHER	James Example CLA CHV MISP MISPE R	16 years	Create new Contact and include in group

- If a sibling is missing from the list of relationships click the link “Click Here to Update Relationships for (Child’s Name)...”
- For further guidance on Updating the Relationships please the Basic Navigation Manual

<input checked="" type="checkbox"/>	Relationship	Name	Age	Info
<input checked="" type="checkbox"/>	Self	Rosie Example	3 years	Automatically included in group
<input checked="" type="checkbox"/>	BROTHER	Ben Example	10 years	Create new Contact and include in group
<input type="checkbox"/>	BROTHER	James Example CLA CHV MISP MISPE R	16 years	Create new Contact and include in group

[Click Here to Update Relationships for Rosie Example...](#)

- Click the “Start Contact” button

Contact - New Contact Record Received

Active Task: Stephen Allwright (Reassign) Started: 24-May-2016 Due: 25-May-2016

Contact Record Task Details No Other Children ▼

The Contact Record has not been started.

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 checked="" type="checkbox"/>	Relationship	Name	Age	Info
<input checked="" type="checkbox"/>	Self	Rosie Example	3 years	Automatically included in group
<input checked="" type="checkbox"/>	BROTHER	Ben Example	10 years	Create new Contact and include in group
<input type="checkbox"/>	BROTHER	James Example CLA CHV MISP MISPE R	16 years	Create new Contact and include in group

[Click Here to Update Relationships for Rosie Example...](#)

3. Completing a Contact Record

- You will then be taken to the Copy Forward screen. This screen lists previous completed forms for the child and any siblings.
- If you need to Copy Forward any previous information or Copy Sideways information from siblings, click the tick box next to form and then click “Copy Forward Selected”.

Child: Rosie Example 3 years (Ref: 556321) Contact Record, 24-May-2016

Information **Record** Consolidation Revisions

Copy Forward - Before starting the Record you have the option to copy forward the answers from the listed previous Records. Select

Copy Forward Selected Start Blank *No Filter applied* Update Filter Clear Filter

Copy Sideways - Copy answers across from related service users

Created	Record	Started By
Example, James (16 years)		
<input type="checkbox"/>	1 year 1 month ago	Contact Record (Wednesday, 1 April 2015)
<input type="checkbox"/>	1 year 9 months ago	CLA Review Minutes (Friday, 8 August 2014)
<input type="checkbox"/>	1 year 9 months ago	CLA Review Outcomes (Friday, 8 August 2014)
<input type="checkbox"/>	2 years ago	CLA Review Outcomes (Saturday, 10 May 2014)
<input type="checkbox"/>	2 years 1 month ago	Essential Information Record (Wednesday, 16 April 2014)
<input type="checkbox"/>	2 years 1 month ago	Record of Outcome of S47 enquiries (Tuesday, 15 April 2014)
<input type="checkbox"/>	2 years 1 month ago	Essential Information Record (Sunday, 13 April 2014)
<input type="checkbox"/>	2 years 1 month ago	Initial Request for Placement (Sunday, 13 April 2014)
<input type="checkbox"/>	2 years 1 month ago	CLA Review Minutes (Wednesday, 9 April 2014)
<input type="checkbox"/>	2 years 1 month ago	Record of Strategy Discussion (Tuesday, 1 April 2014)
<input type="checkbox"/>	2 years 2 months ago	C & F Assessment (Wednesday, 5 March 2014)
<input type="checkbox"/>	2 years 2 months ago	Referral Record (Wednesday, 5 March 2014)
<input type="checkbox"/>	2 years 2 months ago	Contact Record (Wednesday, 5 March 2014)

- If you do not wish to copy an previous in formation click “Start Blank”



3.1. Cancelling a Contact Record

- If you the contact record has been started in error you are able to cancel it
- If the siblings are consolidated and the contact started in error on one of them click the “Consolidation” tab.



- Click the box next to the sibling who should not have had the contact opened and click the “Apply Consolidation” button

Child: Rosie Example 3 years (Ref: 556321)

Information **Record** **Consolidation** Revisions

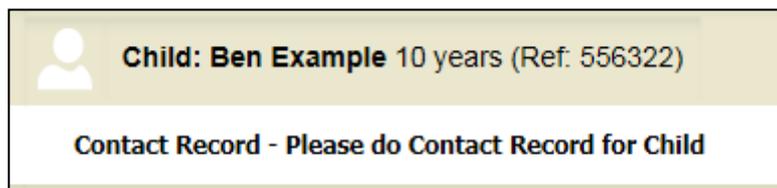
Subjects of this Consolidated Record

Consolidated Record - You may use the following table of persons (who are...
Make sure those selected are those that you wish to be in this group then click

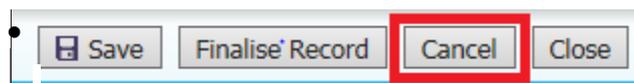
Apply Consolidation Reset

<input checked="" type="checkbox"/>	Subjects of Grouped Record	Comment
<input checked="" type="checkbox"/>	Example, Rosie (3 years)	
<input type="checkbox"/>	Example, Ben (10 years)	

- Click “Home” to return to your worktray
- By the child who has had the contact started in error click the task “Contact Record – Please for Contact Record for Child”



- Then click the “Cancel” button

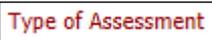


- As shown below you will then need to input a Cancellation Date and a Cancellation Reason.

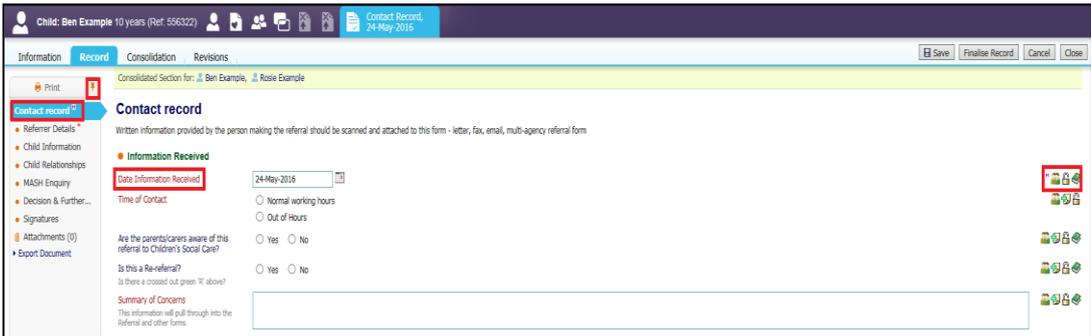
- Click the “Confirm Cancellation” button. If you click “Back to Record” stop the contact from being cancelled.



3.2. Navigating around the Contact Record

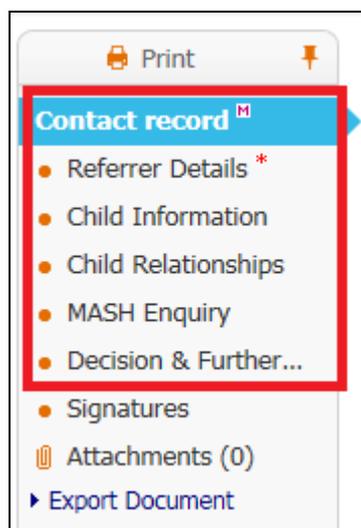
- The current Sidebar bar may be truncated – either hover the mouse over the heading to read in full or click on the “Pin” icon to set the size to automatically adjust to autofit each Sidebar heading. 
- To move to another sidebar, simply click on the Sidebar heading.
- Any field depicted in red means it is a mandatory field. 
- A red * displays when you have filled in a field. A blue * would be if somebody else filled in a field. 
- The “Family Working” icon allows you to unconsolidate a field – enabling you to create separate answers to a question for siblings. You can also rejoin the answers. 

- An “M” means the field is not editable and has been automatically merged. 
- A “post it note” allows you to enter a comment (which doesn’t print out). 
- A “green manual” allows you to read the help guidance. Hoover the mouse to read the instructions or click on the icon to view on a separate screen. Click on “Return to Form” at the top of the page to return to the original screen. 
- The “Open Lock” means that question has not been locked for security. 



3.3. Filling out the Contact Record

- When a contact Record is started it should be completed within 24 hours.
- Go through the tabs on the left hand side of the screen to fill out the relevant information about the contact record.

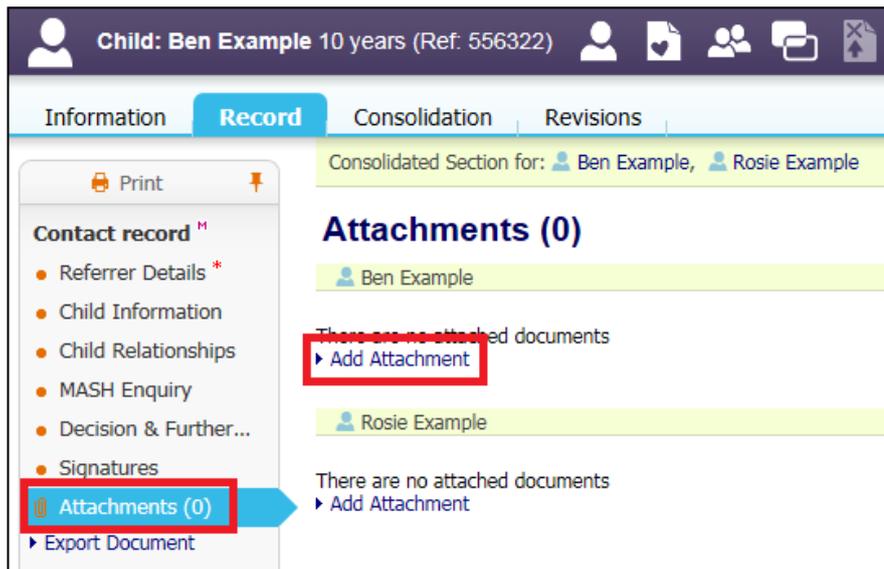


- Referral Details – Requires information about the person making the referral
- Child Information – You are able to update the Ethnicity Information by clicking “Update Ethnicity Details”
- Child Relationships – You are able to update the relationships for the child/young person

- MASH Enquiry – Enables to state whether a MASH Enquiry has been completed
- Decision & Further Action – You state what the Outcome of the Contact Record is and the reasons for the Outcome

3.4. Attaching Documents

- There are times when extra information is received from referrers. It is possible for this information to be attached to the contact record.
- Within the contact record click the “Attachments” tab and then click “Add Attachment”



- Then click in Category drop down menu and choose either “Form Attachment” or “Transfer”
- Click the Type drop down menu, if you choose the one option that is shown.

The 'New Attachment' dialog box is shown with the following fields and options:

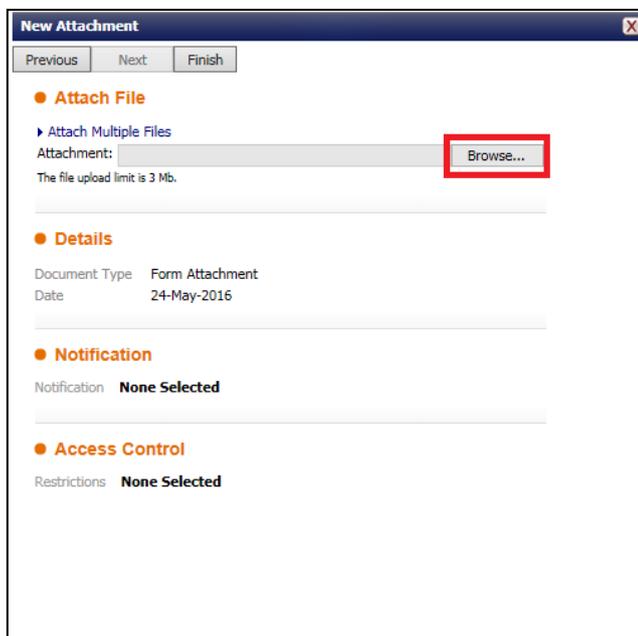
- Document Type:**
 - Category: <All Categories>
 - Type: [Dropdown]
 - Date: 24-May-2016
 - Notes: [Text area]
- Notification:**
 - Notification: None Selected
 - Change notifications for involved users
 - [Update notifications](#)

Navigation buttons: Previous, Next, Finish.

- Then input the Date and any Notes
- Then click the “Next” button
- You can link the siblings attachments so that you only have to input the attachment once.
- Click the box next to the siblings name and then click the “Next” button



- Next you can add the file you want to attach. Click the “Browse” button and search for the file.



- If you wish to attach more than one document click “Attach Multiple Files”. Your screen will then show the below box.

- Once you have found the relevant files click “Finish”

- The document will then be attached to the form.

Attachments (2)

Ben Example

Date	Category	Type	Status	Editor	Notes	Download
24-May-2016	Transfer	Transfer	Completed	Stephen Allwright		Referral.docx

▶ Add Attachment

Rosie Example

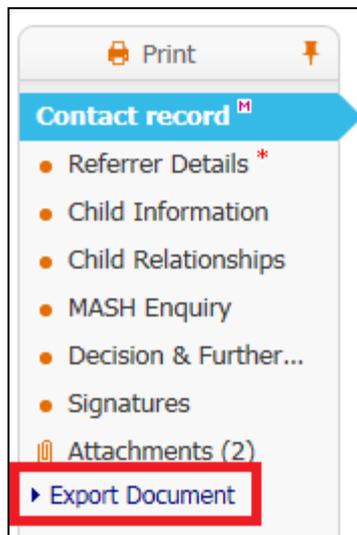
Date	Category	Type	Status	Editor	Notes	Download
24-May-2016	Transfer	Transfer	Completed	Stephen Allwright		Referral.docx

▶ Add Attachment

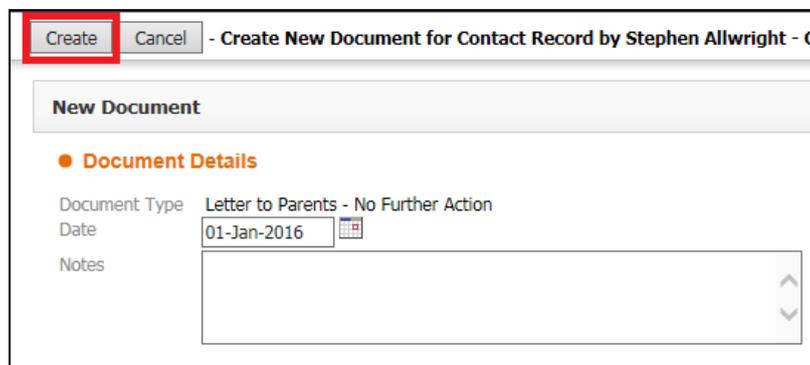
3.5. Exporting a Document

Within the Contact record there are letter templates that advise Parents and Referrers when either an Assessment needs to be carried out or No Further Action is being taken.

- Within the Contact Record click the “Export Document” link



- Input the date
- Click the Category drop down menu and choose either:
 - Referrer
 - Parent
- Click the Type drop down menu and choose either:
 - Letter to Parents – Assessment Required (CF)
 - Letter to Referrer – Assessment Required (CF)
 - Letter to Parents – Early Help Triage
 - Letter to Referrer – Early Help Traige
 - Letter to Parents – No Further Action
 - Letter to Referrer – No Further Action
- Once you have picked the Category and Type click the “Create” button

A screenshot of a 'Create New Document' form. The form has a title bar with 'Create' and 'Cancel' buttons, and a subtitle '- Create New Document for Contact Record by Stephen Allwright - C'. The main content area is titled 'New Document' and contains a section for 'Document Details'. The 'Document Type' is set to 'Letter to Parents - No Further Action'. The 'Date' is set to '01-Jan-2016'. There is a 'Notes' field with a text area and a scroll bar.

- You will then be able to Download the Document by clicking “Download Document”

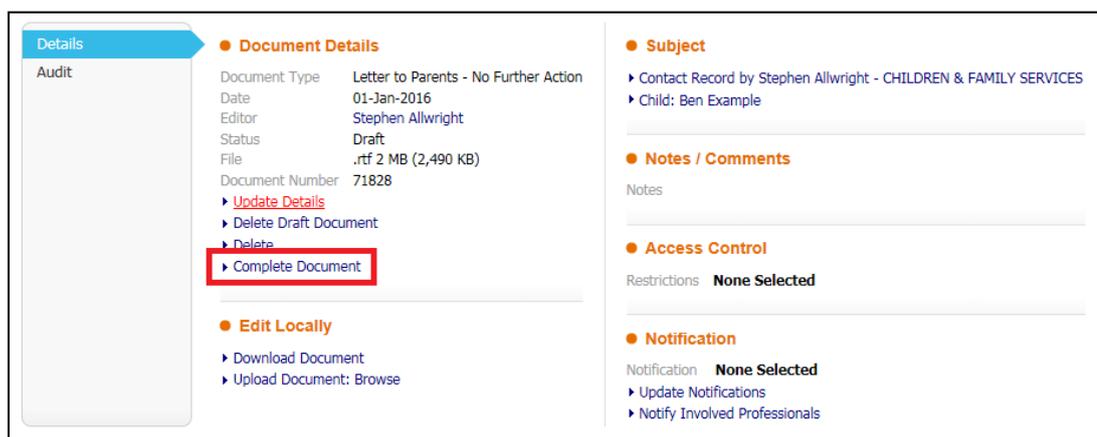
- This will then open a Word Document which you will be able to save and Print out.

3.5.1. Completing Alerts

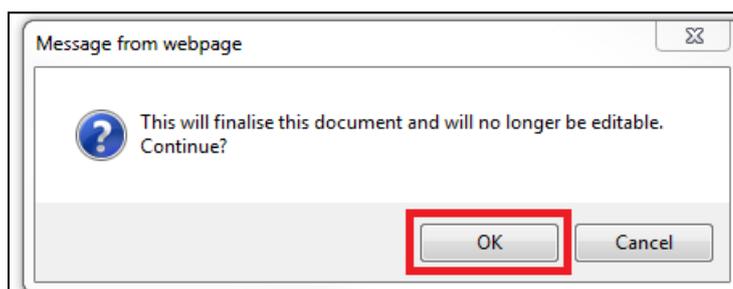
- From Exporting the document you will have an alert task in your worktray
- Click “Home”
- Click the task by the children you are working “Update Document -”



- Once you have sent out the letters to the Parents/Referrer click the “Complete Document” link



- If you are happy to finalise the document click “OK” in the pop up box.



- This will then remove the alert task from your tray.

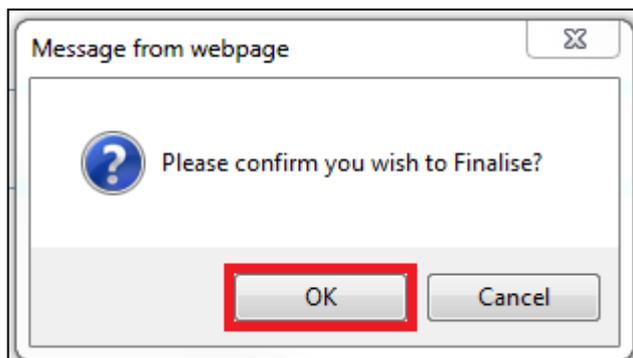
N.B. If siblings are consolidated in a contact you will need to complete the points from 3.5.1 for each child.

4. Finalising the Contact Record

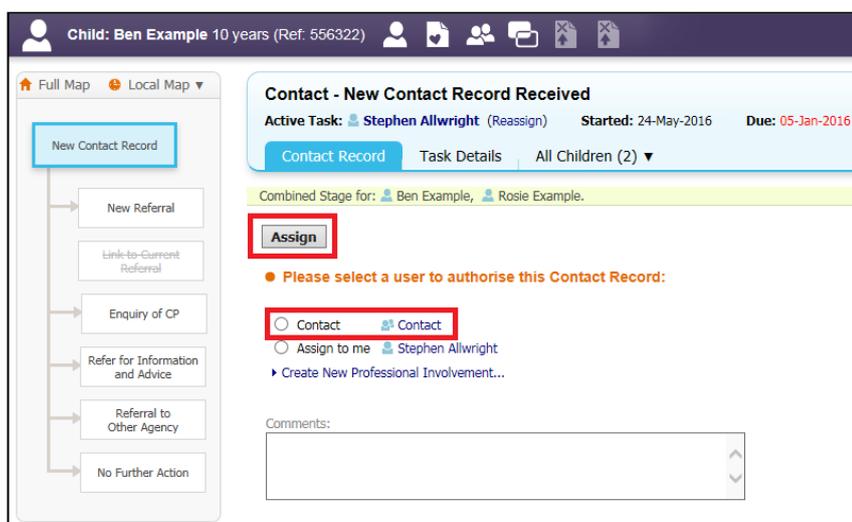
- Once the contact record has been filled out click the “Finalise Record” button



- If you are happy to finalise click “OK” in the pop alert



- You will then need to decide who the Contact Record is authorised by.
- Click the circle next to “Contact” and then click “Assign”



- A manager will then pick the contact record up from the Contact tray and either authorise or request further information.

For any questions or queries please contact the LCS Support Mailbox and an LCS Support Officer will respond and assist you.