

Sefton Council



**EHM**

**Create a Contact**

## Document History

<b>Date</b>	<b>Version</b>	<b>Produced By</b>	<b>Comments</b>
20/01/2015	1.0	Lynn Parsons	Created
25/03/2015	2.0	Lynn Parsons	Modified to incorporate key information section
23/01/2017	3.0	Lynn Parsons	Updated to version 12

## Table of Contents

<b>Maintaining Key Information</b> .....	<b>4</b>
<b>Create a New Contact</b> .....	<b>4</b>
Basic Contact Information.....	6
Other Involved Persons .....	8
Contact details & information gathering.....	9
Outcome .....	10
Saving the Contact .....	10
Finalise the Contact and Assign .....	10
<b>Cancelling a Contact</b> .....	<b>12</b>

## Maintaining Key Information

Prior to creating a contact on a child it is important that you update the information recorded under personal details including **Locality**. Check that the **Relationships** are up to date and that all **Key Agencies** involved are recorded.

## Create a New Contact

In order to record a Contact for a child/young person, the child's record must be displayed. For more information on searching please refer to the eCAF **General** manual and the section on **Searching**.

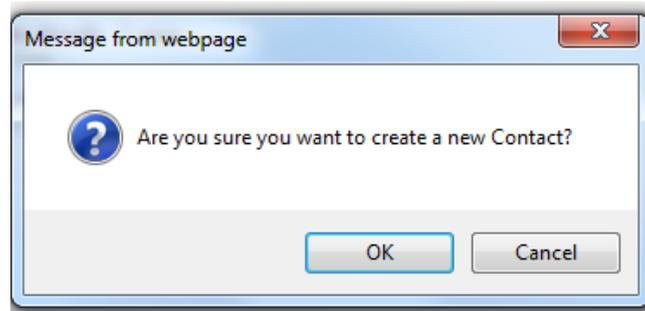
On the **Basic Demographics screen** of the child/young person's record there is a link to **Create a New Contact** under Actions on the right hand side.

**NOTE:** If an open contact exists for the child/young person then a further contact cannot be created; the option to create a new contact will be disabled. In such instances the outstanding open contact would need to be completed or updated with the new details before a new contact can be created.

The screenshot displays the 'Basic Demographics' screen for a child named Jimmy Woods, 7 years old, born on 19-Oct-2009 (Case No: 1019411). The interface is divided into several sections:

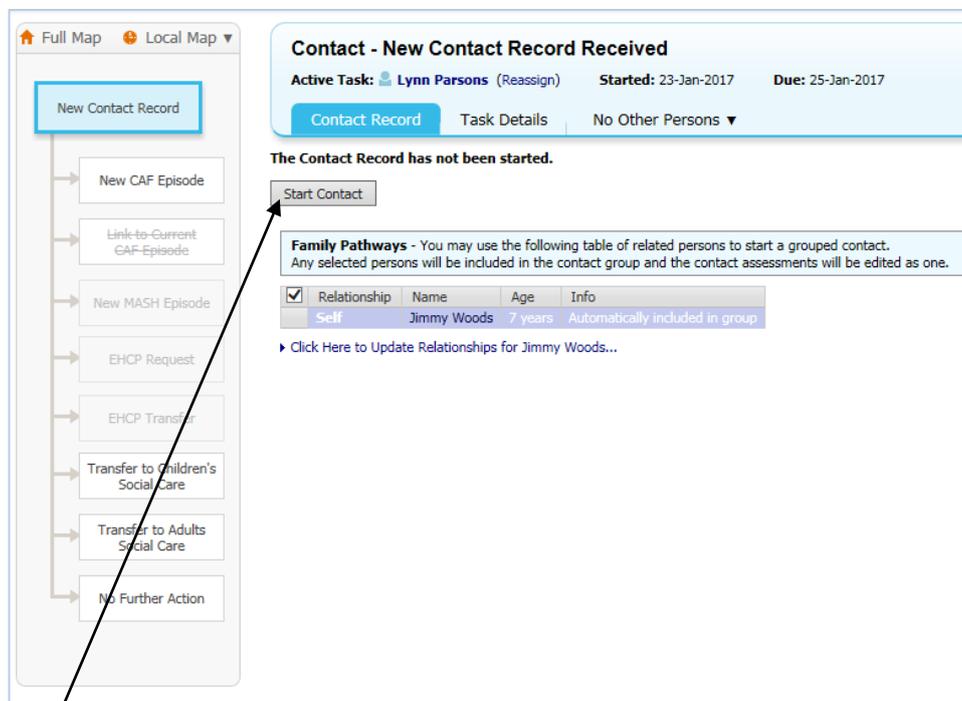
- Personal:** Case Number 1019411, Title, Surname Woods, Forename Jimmy, Gender Male.
- Age / Date of Birth:** Actual DOB 19-Oct-2009, Age 7 years, Unborn Child checkbox.
- Other Names:** Add Other Name button.
- Addresses:** Primary Address 27 Jubilee Road, Crosby, Liverpool L25 3BD. Includes a link to 'Update Addresses' circled in red.
- Troubled Family:** Is this a Troubled Family cohort? checkbox, Update for family link.
- Locality:** Mid Sefton.
- E-Mail:** Add Contact Number / View Historic Numbers... link.
- Telephones:** Add Contact Number / View Historic Numbers... link.
- Disability:** Is Disabled? checkbox, Is on a Disability Register? checkbox, See Further Details for disability details link.
- SEN:** Has special education needs No.
- Important Information:** None at this time. No NHS Number recorded, No UPN recorded. Start New Pre-Assessment Form button.
- Actions:** Create a new Contact, New Document. This section is circled in red.
- Relationships:** Jimmy Woods - 7 years (This Child), Mary Woods - ~ 29 years (Jimmy's Mother).

The following prompt will appear:



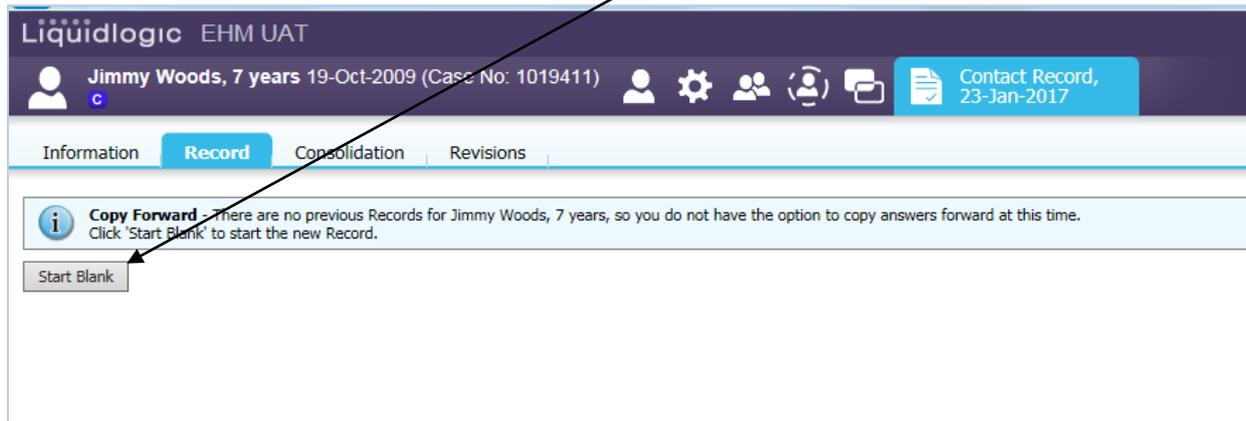
Click **OK** to confirm that a new contact will be created or **Cancel** to return to the personal tab on the child's record.

The new contact record screen is displayed:



If there are any siblings displayed select which children should be included in the Contact the Click on **Start Contact**.

If there are existing records then you will be asked to select which records to copy forward; if there are no previous records then you will only be able to Start Blank



The **Contact Record** screen will be displayed.



### **Basic Contact Information**



To start entering data into the Contact Record click on the first section under the Contact Record (**Basic Contact Information**):

The screenshot shows the 'Contact Record' form in the Liquidlogic EHM UAT system. The user is Jimmy Woods, 7 years old, with case number 1019411. The record is dated 23-Jan-2017. The form is divided into sections: 'Basic contact information' and 'Details of person making contact'. Fields with red text are mandatory.

Field Name	Field Type	Value / Options
Date of Contact	Text/Calendar	23-Jan-2017
Time of Contact	Radio Buttons	Normal working hours, Out of Hours - Evening, Out of Hours - Morning
Contact Method	Pull-down	[Dropdown]
Who has made contact?	Pull-down	[Dropdown]
Source Type	Pull-down	[Dropdown]
Contact email	Text	[Text Field]

Fields with **Red Text** are mandatory fields; if a mandatory question has not been answered, a yellow alert will be displayed to notify the user of which fields have been omitted or contain invalid information.

A form cannot be finalised until all the mandatory fields are completed correctly:-

- Date of Contact** Enter the actual date of the Contact (this can be backdated if required) use the calendar to select the date OR type it in using the format **dd/mm/yyyy**
- Time of Contact** Select from the three options by clicking the button next to the relevant text
- Contact Method** From the pull-down box select the method of contact
- Who has made the contact** From the pull-down box select who made the contact – **depending on the selection made additional fields will be displayed; please complete all information you have for this contact.**
- Source Type** From the pull-down box select the source type of the contact

## Other Involved Persons

This screen is split into two sections:-

Family / household members and significant others

Other agencies

The screenshot shows the 'Other involved persons details' screen for Jimmy Woods, 7 years old. The interface includes a navigation menu on the left with options like 'Print', 'Contact Record', 'Basic contact information', 'Other involved persons', 'Contact details & I...', 'Outcome', and 'Attachments (0)'. The main content area is titled 'Other involved persons details' and is split into two sections: 'Family / household members and significant others' and 'Other agencies'. The 'Family / household members and significant others' section is titled 'Relationships for Jimmy Woods, 7 years' and contains a table with columns for 'MC', 'YC', 'PR', 'NK', 'EC', 'Defined Relationships', 'Name', 'Age/Gender', 'Address', and 'Start/End Date'. A row is shown for 'Mother' with a dropdown menu, 'Mary Woods', '29 years Female', '27 Jubilee Road, Crosby, Liverpool, L23 3BD', and '23-Jan-2017'. Below the table are links for 'Search and Create' and 'Suggest'. The 'Other agencies' section is titled 'Other agencies' and contains the text 'No Other Agencies have been defined.' and a link to 'Add Other Agency'.

MC	YC	PR	NK	EC	Defined Relationships	Name	Age/Gender	Address	Start/End Date
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mother	Mary Woods	29 years Female	27 Jubilee Road, Crosby, Liverpool, L23 3BD	23-Jan-2017

This information will pull through into each section from the Basic Demographic information of the Person which has previously been set up.

**It is important that all relationships and agencies are recorded in the Basic Demographics screen of the child/young person.**

## Contact details & information gathering

Please enter as much information into each of the fields on this screen.

The screenshot shows a web application interface for 'Liquidlogic EHM UAT'. The user is logged in as 'Jimmy Woods, 7 years 19-Oct-2009 (Case No. 1019411)'. The current page is 'Contact Record, 23 Jan 2017'. The navigation menu includes 'Information', 'Record', 'Consolidation', and 'Revisions'. The left sidebar shows a tree view with 'Contact Record' expanded, containing 'Basic contact info...', 'Other involved per...', 'Contact details & I...', 'Outcome', and 'Attachments (0)'. The main content area is titled 'Contact details & information gathering' and contains several text input fields: 'Details of contact', 'Child's current whereabouts', 'Initial information gathering', 'Brief details of any relevant early intervention work provided', and 'Notes'. Below these fields are three sections with radio button options: 'Threshold Level' (with options 1, 2, 3a, 3b, 4), 'Community Adolescence Service' (with Yes/No options), and 'Consent & information sharing' (with Yes/No options for child/young person, parent/carer awareness, and consent to share information).

The **Threshold Level** field is Mandatory and must be completed to proceed.

## Outcome

Please complete all fields on this screen.

### ***Saving the Contact***

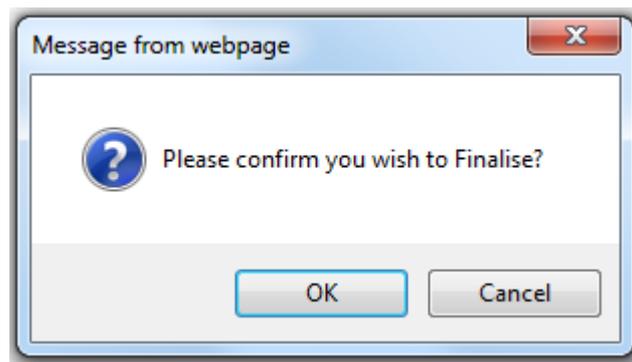
You can save the Contact Details at any point when entering the information by clicking the **Save** button at the top right hand side of the Contact Form.

### ***Finalise the Contact and Assign***

Finalising the Contact Form will mean that you have entered all of the information relating to the Contact; you will not be able to make any further amendments.

To finalise the Contact click on the **Finalise Record** at the top of the screen.

You will be prompted to confirm you wish to **Finalise** the form:-



Click on **OK** and the following screen will be displayed:

### Contact - New Contact Record Received

Active Task: Lynn Parsons (Reassign)    Started: 23-Jan-2017    Due: 25-Jan-2017

Contact Record    Task Details    No Other Persons ▼

**Assign**

● Please select a user to authorise this Contact Record:

Triage Group Early Help Gateway

Comments:

You will be prompted to assign the Contact for Authorisation, there will only be one option available – **Triage Group**.

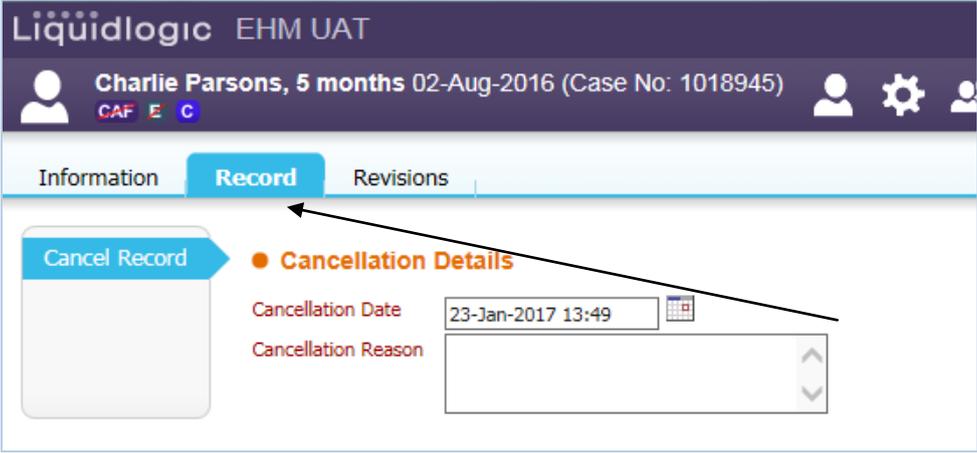
Click in the button next to the Team and then click **Assign** at the top of the screen.

## Cancelling a Contact

If the contact has been created in error it can be cancelled using the Cancel Record button.

Once a Contact Form has been started it can be cancelled at any point prior to finalising it

At any point in the Contact Form click on the **Cancel** button at the top right hand of the screen. The Cancellation Screen will be displayed:



The screenshot shows the 'Cancellation Details' screen in the Liquidlogic EHM UAT interface. The header includes the user name 'Charlie Parsons, 5 months 02-Aug-2016 (Case No: 1018945)'. The 'Record' tab is selected. A 'Cancel Record' button is visible on the left. The 'Cancellation Details' section contains a 'Cancellation Date' field with the value '23-Jan-2017 13:49' and a 'Cancellation Reason' text box. An arrow points from the 'Cancel Record' button to the 'Cancellation Details' section.

The date field will default to the current date and you will need to provide a cancellation reason in the text box.

Once the above fields have been completed click on the **Confirm Cancellation** button.