

# **Chronology**Case Notes (CSS / SEN / EHCP)

Case notes for Children's Support Services (CSS), Special Education Needs (SEN) and Education, Health and Care Plan (EHCP) are used to record details of events, meetings and communications between people.

Case notes can be added by various professionals who are also One users. A case note displays which service team it relates to and provides details of who created the case note.

Access to the Case Notes functionality for CSS, SEN and EHCP is via the Chronology link in the Links panel.

Case note permissions are granted according to the permissions given to the post.

## **Creating a New Case Note**

To create a new case note:

Select Focus | People | Students | Links |
 Chronology to display the student's Chronology
 page.

Existing records are displayed in the **Chronology** panel below, according to the selections made in the **Filter** panel.

Click the New button and select New Case Note to display the Case Note Details page.

From here you can set ACLs, add alerts and show relationships.

The **Subject Details** panel displays read-only information about the subject. Click the **Details** link to display the **Person Details** dialog to make any changes.

On the **Case Note** panel, **Case Reference Number** is only required for ICS case notes.

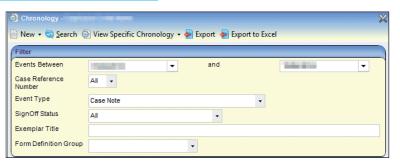
- 3. If required, select **Key Event**.
- 4. Select an Event Type.
- 5. Select a Service Team (mandatory).

**Created By** is populated after the case note is saved.

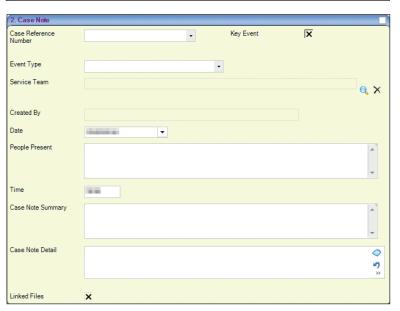
- 6. Select a Date and enter a Time.
- 7. Enter the details of People Present.
- 8. Enter the Case Note Summary.
- Enter the Case Note Detail; this is in the form of a memo.
- Any linked files or documents are recorded on the Linked Files check box.
- 11. Click the Save button.

If you do not want to sign off the case note at this point, click the cross at the top of the page to close the case note and return to the **Chronology** page.

Click the **Search** button to refresh the **Chronology** browse and view the chronology history.







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Drag a column here to group by this column.								
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For more information on using the chronology, see RG\_Chronology\_Using the Chronology.



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# Signing Off a Case Note

Case notes can be signed off immediately or at a later date, if required. Only the person designated to sign off the case note can complete the digital sign off. To send the case note to another person for sign off, you must use the **Workflow** functionality. For more information see *Using Workflow to Sign Off a Case Note*.

To sign off a case note:

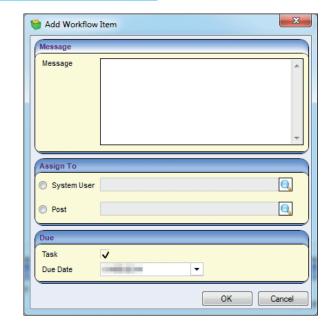
- In the Sign Off panel, click the Sign Now button.
   The Digital Signature and the date are populated.
- Click the Save button, then close the case note.



#### **Using Workflow to Sign Off a Case Note**

If you are not the designated signatory for the case note, you must send a message to another user for sign off. To send a workflow message:

- Click the Workflow button at the top of the page to display the Add Workflow Item dialog.
- 2. Enter a Message.
  - This is displayed in the  ${f My}$  Workflow Messages panel on  ${f My}$  Home Page.
- 3. Select a **System User** or a **Post** to assign the workflow item to.
- 4. If required, select the Task check-box.
- The Due Date defaults to one week ahead, but can be edited.If the date is more than a week ahead, the message will not instantly display in the My Workflow Messages panel.
- 6. Click the **OK** button.



### **Cloning a Case Note**

Signed or unsigned case notes can be cloned for use with a different subject. To clone a case note:

- Click the Clone button at the top of the page to display the new case note.
- 2. Select a new Subject.
- Select a new Service Team (mandatory).
- 4. If required, edit the cloned fields on the Case Note panel.
- Click the Save button. The Created By field is populated.
   The case note displays in the new subject's chronology.

