



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:

1. 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.

2. 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**.
9. Enter the **Case Note Detail**; this is in the form of a memo.
10. 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.

Date	Updated By	Case Note Key Event	Linked File	Event	CRN	Type	Status	Chronology
		<input type="checkbox"/>	No					<input type="checkbox"/>
		<input checked="" type="checkbox"/>	No	CN Summary				<input checked="" type="checkbox"/>

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:

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

The screenshot shows a dialog box titled '3. Sign Off'. It contains three input fields: 'Sign Off', 'Digital Signature', and 'On'. A 'Sign Now' button is located to the right of the 'On' field.

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:

1. 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 **My Workflow Messages** panel on **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.
5. 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.

The screenshot shows the 'Add Workflow Item' dialog box. It has a 'Message' section with a text area. Below that is the 'Assign To' section with radio buttons for 'System User' and 'Post'. At the bottom is the 'Due' section with a checked 'Task' checkbox and a 'Due Date' dropdown menu. 'OK' and 'Cancel' buttons are at the bottom right.

Cloning a Case Note

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

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

The screenshot shows the 'Case Note' form. It has fields for 'Case Reference Number', 'Event Type', 'Service Team', 'Created By', 'Date', 'People Present', 'Time', 'Case Note Summary', 'Case Note Detail', and 'Linked Files'. There is also a 'Key Event' checkbox.



Related Reference Guides:

- RG_Chronology_Using the Chronology