

Chronology and History Reference Guide

Contents

Introduction	2
What is the difference between the History and Chronology tabs?	2
The History Tab	2
Configuring Events in the History Tab	2
Creating a Chronology	5
Add to Chronology	5
Add Individual Events to a Chronology	5
The Chronology Tab	6
Add New Chronology Item	7
Add New Chronology Group	8
Exporting a Chronology	10
Printing the Chronology	13
Merge Events into Groups	14
Export Chronology Bundle	15
Delete Chronology	16
Archive Chronology	16
Retrieve an Archive	17



Introduction

This Quick Reference Guide will describe how to create Chronologies for an individual's record in LCS. This will involve the use of the **History** tab and the **Chronology** tab.

What is the difference between the History and Chronology tabs?

The History tab shows the **Case History** for an individual and are referred to as **events**. Whenever the individual's record is updated (e.g. adding case notes, starting forms, updating basic demographics etc), a new event will be recorded within the case history for the individual.

The **Chronology** shows a list of key/significant events that have taken place in an individual's life. The Chronology can be populated using events from the History tab or individual events can be manually added by the Case Worker.

The History Tab

Configuring Events in the History Tab

1. With the History tab selected, click on **Configure View**

Personal	•	Cas	se History - Ne	west	events first			
<u>P</u> ersonal	[New	est Events First	~	Configure View Creat	te Chronology Add to Chronology]	
Additional					-	57 57	1	
Identity			Date		Category	Туре	Event Details	Actions
Photos			20-Dec-2019		General Events	Address Change	End of Primary Address: 2 The Common Pershore Lane	۹+
RISKS			20-Dec-2019		General Events	Address Change	Primary Address: 107 Spetchley Road	Q +
Parental Factors Relation <u>s</u> hips			20-Dec-2019		Relationships	Relation Address Change	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road	Q.+
<u>I</u> nvolvements CIN			20-Dec-2019		Relationships	Relation Address Change	End of Address for (Father) Tim Macdonald - Primary Address: 2 The Common Pershore Lane	Q.+
CP CLA			20-Dec-2019		Relationships	Relation Address Change	Change of Address for (Mother) Jackie Macdonald - Primary Address: 107 Spetchley Road	۹+
Adoption			20-Dec-2019		Relationships	Relation Address Change	End of Address for (Mother) Jackie Macdonald - Primary Address: 2 The Common Pershore Lane	Q.+
History			19-Dec-2019		General Events	Address Change	End of Work Address: 9 Harrow Croft	Q +
			16-Doc-2010		Conoral Evonto	Addross Change	Work Addrocc: 0 Harrow Croft	0 +



2. The following screen will show a list of all the **Event Types**



3. Events can be configured to show by date range

Select the D	ites to include in theChronology	
From Date	Until Date (Note: Leave blank to include all dates)	

4. The **Predefined Template** shows various sections that can be selected. Clicking on an item in the list will select all events in that section



Liquidlogic User Guide





- Address Changes
 Missing Person Records
 Demographics
- 6. Individual events can be selected/deselected by clicking on the relevant check boxes



 When all relevant events have been selected, click on the Return to Information View button

Case History -	Newest events first			
Return to Information Select the Dates t	Niew	ology		
From Date	Until Date	(Note: Le	ave blank to include all dates)	
Select Information	n To Display			
Predefined Templa	ite	\checkmark		
General Workspaces	General Events (all none)	Case Notes (all none)	Health (all none)	Legal Status (all none)
	✓ Hazards	✓ Significant Events	Other Significant Health	Special Guardianship
	Address Changes	Others	Events	Order Legal Statuses
	Missing Person Records	Birth Relative Initiated Contact	 Substance Misuses Health Development 	\Box CLA Legal Statuses
	✓ Demographics	Friends and Family	- Checks	Placements (all none)



8. The Case History will be filtered to show the selected events

Case History - New Newest Events First	Configure View Cr	eate Chronology Add to Chronology		
Date	Category	Туре	Event Details	Actions
20-Dec-2019	Relationships	Relation Address Change	Change of Address for (Mother) Jackie Macdonald - Primary Address: 107 Spetchley Road	Q.+
20-Dec-2019	Relationships	Relation Address Change	End of Address for (Father) Tim Macdonald - Primary Address: 2 The Common Pershore Lane	Q.+
20-Dec-2019	Relationships	Relation Address Change	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road	Q.+
20-Dec-2019	Relationships	Relation Address Change	End of Address for (Mother) Jackie Macdonald - Primary Address: 2 The Common Pershore Lane	Q +
25-Nov-2019	Case Notes	Case Note	Contact Type: Case Note Summary, Reason for Contact:	Q.+

Creating a Chronology

You can create a chronology using all the displayed Case History events by clicking on the **Create Chronology** button

Case History - Newest events first						
Newest Events First \checkmark	Configure View	Create Chronology	Add to Chronology			

NOTE: This will remove any existing chronology and replace it with the events listed in the Case History view

Add to Chronology

Select the **Add to Chronology** button to add all listed Case History events to the existing Chronology



Add Individual Events to a Chronology

In the Case History table, each event has a + button at the end of each row.

	20-Dec-2019	Relationships	Relation Address Change	End of Address for (Mother) Jackie Macdonald - Primary Address: 2 The Common Pershore Lane	9	
--	-------------	---------------	-------------------------	--	---	--



Selecting it will add the individual event to the Chronology and change the icon to a – symbol



Clicking on the – symbol will remove this event from the Chronology and change the symbol back to a + symbol. This gives you the option to add it back to the chronology if required.

When all events have been added, click on the **Chronology tab** to access the Chronology and view the events that have been added

Personal	Chronology					
Personal	Chronology	Event Date	Category	Туре	Event Details	Document Ref
Identity	14-Nov-2019	14-Nov-2019	Relationships	New Relationship	New Relationship (Mother) Jackie Macdonald	
Photos	Merge Down	14-Nov-2019	Relationships	New Relationship	New Relationship (Uncle) Benny Hill	
Risks Barontal Factors	15-Nov-2019	15-Nov-2019	Children's Social	Form Completion	Placement Search Record, by Sally Cook	
Relationships	Merge Down	15-Nov-2019	Children's Social Care	Form Draft	Case Transfer, by Tony Anagnostopoulos	
CIN	25-Nov-2019 Merge Down	25-Nov-2019	Case Notes	Case Note	Contact Type: Case Note Summary, Reason for Contact: This is an example of a case.	
CLA Adoption Cos <u>t</u> s History	20-Dec-2019	20-Dec-2019 20-Dec-2019	Relationships Relationships	Relation Address Change Relation Address Change	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road Change of Address for (Mother) Jackie Macdonald - Primary Address: 107 Spetchley Road	
<u>Time Line</u> <u>C</u> hronology	Add New Chrono Add New Chrono Print Current Chr	logy Group logy Item onology				-
Shared History <u>F</u> orms Documents	Export Chronology Export Chronology Bundle Delete Chronology					

The Chronology Tab

The Chronology Tab shows the current chronology and provides various options in relation to the Chronology

Personal	Chronology					
Personal Additional	Chronology	Event Date	Category	Туре	Event Details	Document Ref
Identity	14-Nov-2019	14-Nov-2019	Relationships	New Relationship	New Relationship (Mother) Jackie Macdonald	
Photos	Merge Down	14-Nov-2019	Relationships	New Relationship	New Relationship (Uncle) Benny Hill	
Risks	15-Nov-2019	15-Nov-2019	Children's Social	Form Completion	Placement Search Record, by Sally Cook	
Parental Factors Relationships	Merge Down	15-Nov-2019	Care Children's Social Care	Form Draft	Case Transfer, by Tony Anagnostopoulos	
CIN	25-Nov-2019	25-Nov-2019	Case Notes	Case Note	Contact Type: Case Note Summary, Reason for Contact: This is an example of a case.	
CLA Adoption Cos <u>t</u> s	20-Dec-2019	20-Dec-2019 20-Dec-2019	Relationships Relationships	Relation Address Change Relation Address Change	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road Change of Address for (Mother) Jackie Macdonald - Primary Address: 107 Snetchley Road	
History Time Line Chronology Shared History Forms	Add New Chrono Add New Chrono Print Current Chr Export Chronolog	logy Group logy Item ronology gy		entinge	apound room	
<u>D</u> ocuments Case <u>N</u> otes	Export Chronolog Delete Chronolog	gy Bundle gy				



Add New Chronology Item

1. Click on the link Add New Chronology Item



2. In the window that appears, record details of the Chronology Event. Click **Create** when done.

New Chronology Ite	m	\otimes					
Create Cancel							
Chronology	Group Item						
Date of Event	09-Dec-2019						
Category	Health						
Туре	Health Assessments						
Details	Diagnosis of Asperger's Syndrome provided by specialists						
Document Ref							
Copied From	n						
No Copied From	No Copied From						
Remove Copie	Remove Copied From Link						
Create Cancel							

3. The event will be added to the Chronology and organised by the date of the event.

Chronology					
Chronology	Event Date	Category	Туре	Event Details	Document Ref
14-Nov-2019	14-Nov-2019	Relationships	New Relationship	New Relationship (Mother) Jackie Macdonald	
Merge Down	14-Nov-2019	Relationships	New Relationship	New Relationship (Uncle) Benny Hill	
15-Nov-2019 Merge Down	15-Nov-2019 15-Nov-2019	Children's Social Care Children's Social Care	Form Completion Form Draft	Placement Search Record, by Sally Cook Case Transfer, by Tony Anagnostopoulos	
25-Nov-2019 Merge Down	25-Nov-2019	Case Notes	Case Note	Contact Type: Case Note Summary, Reason for Contact: This is an example of a case.	
09-Dec-2019	09-Dec-2019	Health	Health Assessments	Diagnosis of Asperger's Syndrome provided by specialists	
Merge Down					
20-Dec-2019	20-Dec-2019 20-Dec-2019	Relationships Relationships	Relation Address Change Relation Address Change	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road Change of Address for (Mother) Jackie Macdonald - Primary Address: 107 Spetchley Road	



Add New Chronology Group

Chronology Events can be grouped in a date range called a **Chronology Group**

1. Click the link Add New Chronology Group



2. In the window that appears, add the appropriate date range. When done, click **Create**.

Create new Chronology Group						
Create Cancel						
<u>C</u> hronology	Date Ra	nge				
	Start Date	10-Dec-2019				
	End Date	17-Dec-2019 ×				
	• Summar	risable Details				
	Date Alias					
Create Cancel						

3. A group will be added to Chronology table with the relevant date range.

	09-Dec-2019	09-Dec-2019	Health	Health Assessments	Diagnosis of Asperger's Syndrome provided I
_	Merge Down				
	10-Dec-2019 - 17-Dec-2019 Merge Down Unmerge				
l					
	20-Dec-2019	20-Dec-2019	Relationships	Relation Address Change	Change of Address for (Father) Tim Macdona Spetchley Road
		20-Dec-2019	Relationships	Relation Address Change	Change of Address for (Mother) Jackie Macd Spetchley Road

4. Click on the row to see a screen which allows you to add Chronology Items





5. Add the information and click **Create**

Create Cancel	- New Chronology Item						
New Group Item							
Chronology	Group Item						
Date of Event	13-Dec-2019						
Category	Case Recording						
Туре	Case Note						
Details	Notes written following meeting						
Document Ref							
Copied From	n						
No Copied Fron	n						
Remove Copie	ed From Link						

6. The screen will show a summary of added Chronology Items. Add as many items as required for the group. When done, click **Create**

Update Cancel - Updat	te: 10-Dec-2019 - 17-Dec-2019
<u>C</u> hronology	Date Range Start Date 10-Dec-2019 End Date 17-Dec-2019
	Summarisable Details Date Alias Notes 12-Dec-2019 - Home Visit: Meeting - Meeting to discuss care options
	13-Dec-2019 - Case Recording: Case Note - Notes written following meeting Actions Delete Chronology Group Add Chronology Item

7. Once updated, each item will appear within the Chronology Group

Liquidlogic User Guide



09-Dec-2019	09-Dec-2019	Health	Health Assessments	Diagnosis of Asperger's Syndrome provided by specialists
Merge Down				
10-Dec-2019 - 17-Dec-2019	12-Dec-2019	Home Visit	Meeting	Meeting to discuss care options
Merge Down Unmerge	13-Dec-2019	Case Recording	Case Note	Notes written following meeting
20-Dec-2019	20-Dec-2019	Relationships	Relation Address Change	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road
	20-Dec-2019	Relationships	Relation Address Change	Change of Address for (Mother) Jackie Macdonald - Primary Address: 107 Spetchley Road

NOTE: You are unable to create a Chronology group if it overlaps with Chronology groups that already exist.

• Chion	• Chronology							
Chronol	logy	Event Date	Categor	y Type Event Details				
				Create new Chronology Group				
14-Nov	v-2019	14-Nov-2019	Relatio	Unable to create record.	T			
Merge F	Down	14-Nov-2019	Relatic		H.			
15-Nov	v-2019	15-Nov-2019	Childre	 Ine specified date range is invalid because it would overlap the following other Chronology groups: 15-Nov-2019 to 15-Nov-2019 				
Merge E	Down	15-Nov-2019	Care Childre Care	• 25-Nov-2019 to 25-Nov-2019 • 09-Dec-2019 to 09-Dec-2019				
25-Nov	v-2019	25-Nov-2019	Case N	Create Cancel				
Merge D	Down			Chronology • Date Range	11			
09-Dec	c-2019	09-Dec-2019	Health	Start Date 15-Nov-2019				
Merge D	Down			End Date 09-Dec-2019 ×	11			
20-Dec	c- 2019	20-Dec-2019	Relatio					
		20-Dec-2019	Relatio	Summarisable Details	11			
				Date Alias	11			
Add New	v Chrono	logy Group			11			
Add New Print Cur	v Chrono rrent Chr	logy Item		Create Cancel				
Think Cur	nene eni	onology						

Exporting a Chronology

A Chronology can be exported to produce a document that can be used for court proceedings.

1. Select Export Chronology





2. Fill I the relevant fields and click on Create



3. On the following screen, complete the fields in the **Edit Locally** section and select **Create Document**

Details	Document Details	Subject		
Details Audit	Document Details Document Type Court Document version of Chronology Date 01-Aug-2020 Editor Mrs Gurpreet Kumari - Centre Professional Practice Status Draft File File not found. Document Number 72839377 Update Details Delete Draft Document Complete Document Change document type Edit Locally Upload Document: Browse RTF Generator The following information is required in the document Once you have entered the information, please click on the Create Document Link	 Subject Child: Betty Heinz Notes / Comments / Review Notes Access Control Restrictions None Selected Specify Access and Restrictions Administrative Actions Administrative Actions Motification Mrs Gurpreet Kumari - Centre Professional Practice Update Notifications Notify Involved Professionals 		
	Court Date Court Name Court Case Number Applicant First Respondent Second Respondent Third Respondent Chird Expondent Chird Respondent Chird R			

4. The document will now be created from a template. To view the document, click on **Download Document**. This will open the document in Microsoft Word and allow you to amend the document if required.



Details	Document Deta	ils
Audit	Document Type Date Editor Status File Document Number • Update Details • Delete Draft Docu • Complete Document • Edit Locally • Download Document	Court Document version of Chronology 20-Dec-2019 Worker One - Team 1 Draft .rtf 201 KB 11113565 ument ent t: Browse

 After making any changes, you will need to save the document to your computer and re-upload it by clicking on **Upload Document: Browse**. This will show the file explorer to locate the edited document for upload.



6. If you are happy with the document, click on the **Complete Document** link. This will save the document in its current form.

Details	Document Details
Audit	Document Type Court Document version of Chronology Date 20-Dec-2019 Editor Worker One - Team 1 Status Draft File .rtf 201 KB Document Number 11113565 • Update Details • Delete Draft Document • Complete Document • Complete Document
	 Edit Locally Download Document Upload Document: Browse

7. A copy of the Chronology will be saved within the Documents Tab on the individual's record



Personal	• •	ocuments								
Personal	► Cr	eate/Attach Doo	cument							
<u>A</u> dditional	No	No filter applied - 5 records.								
Identity		Date	Category	Турс	Status	Team	Editor	Notes	Download	
Photos Risks	1	20-Dec-2019	Court Document	Court Document version of Chronology	Completed	Team 1	Worker One	Document for court	Download the document	
Parental Factors	2	15-Nov-2019	Form Attachment	Form Attachment	Completed	Worcestershire County	Tony	attachmont	document docx	
Relationships						Council	Anagnostopoulos	_		
nvolvements	3	14-Nov-2019	Adoption Document	Records	Completed	Worcestershire County Council	Tony Anagnostopoulos	Letter from GP	GP letter.docx	
IN	4	07-Nov-2018	Adoption Document	Education Document	Completed	Worcestershire County Council	Tony Anagnostopoulos	Attendance letter	Attendance concerns.docx	
л 1А	5	06-Nov-2017	Adoption Document	Education Document	Completed	Worcestershire County Council	Tony Anagnostopoulos	Claire's grades 2017	Claire's grades.doc	
aopuon isisto isistory jime Line faronology ihared History ome										

Printing the Chronology

1. Click on Print Current Chronology

Add New Chronology Group Add New Chronology Item					
Print Current Chronology					
Export Chronology Export Chronology Bundle Delete Chronology					

2. A printable view of the Chronology will appear with various option to change the size and orientation and export as a PDF



X Close Printable View Portrait Landscape Small Medium Large Largest Print page now 📆								
ARE YOU PRINTING CONFIDENTIAL OR SENSITIVE INFORMATION? If so check that those to whom you will provide copies of the document are entitled to see the information. The information contained in printed documentation and the distribution of that documentation is solely the responsibility of the user of this system. The software and / or system provider cannot in anyway be held liable for the distribution of confidential information to any entity, legal or personal, having no entitlement to be privy to the information contained in forms and documents that the user has produced using this system.								
Dudley Metropolitan Centre Professional Pr Corbyn Road Dudley West Midlands DY1 2JZ Tel: Fax:	Dudley Metropolitan Borough Council Centre Professional Practice Corbyn Road Dudley West Midlands DY1 2JZ Tel:							
Child: Betty Heinz								
Full Name		Betty Heinz	Betty Heinz					
Date of Birth		01-Jan-2020	01-Jan-2020					
Case Number		701612	701612					
Gender		Female						
Referral Start Date		26-Oct-2020	26-Oct-2020					
Chronology								
Chronology	Event Date	Category	Туре	Event Details	Document Ref			
01-Jan-2020	01-Jan-2020	Birth		Betty Born				
01-Aug-2020	01-Aug-2020	Court report						

3. To close the printable view, click on the option **Close Printable View**

X Close Printable View | Portrait Landscape | Small Medium Large Largest | Print page now | 🏗

NOTE: For details on printing in LCS/EHM, please see the relevant guidance document on the intranet.

Merge Events into Groups

You can merge individual events into groups

1. In the list of events in the Chronology, click on the word Merge down

Chronology	Event Date	Category	Туре	Event Details
14-Nov-201	19 14-Nov-2019	Relationships	New Relationship	New Relationship (Mother) Jackie Macdonald
Merge Down	14-Nov-2019	Relationships	New Relationship	New Relationship (Uncle) Benny Hill
15-Nov-201	19 15-Nov-2019	Children's Social Care	Form Completion	Placement Search Record, by Sally Cook
Merge Down	15-Nov-2019	Children's Social Care	Form Draft	Case Transfer, by Tony Anagnostopoulos

 The events will now be merged into a group. These can be merged down further into subsequent groups. They can be unmerged by clicking the **unmerge** link



Chronology	Event Date	Category	Туре	Event Details
14-Nov-2019 - 15-Nov-2019 Merge Down Unmerge	14-Nov-2019 14-Nov-2019 15-Nov-2019 15-Nov-2019	Relationships Relationships Children's Social Care Children's Social Care	New Relationship New Relationship Form Completion Form Draft	New Relationship (Mother) Jackie Macdonald New Relationship (Uncle) Benny Hill Placement Search Record, by Sally Cook Case Transfer, by Tony Anagnostopoulos

Export Chronology Bundle

This creates a Zip file, which includes a chronology as well as separating individual events into folders.

1. Click Export Chronology Bundle



2. A file will download. Click to save or open the file

	Chronology Audit	
	Created 20-Dec-2019 12:39 by Worker One Last Updated 20-Dec-2019 15:02 by Worker One	
_	Chronology Archive	
	Do you want to open or save Chronology for Child_Claire Macdonald.zip from protocolwor.syhapp.com?	Open Save 🔻 Cancel 🛪

3. Clicking **Open** will open the file explorer where you can see the generated export documents created as well as folders holding details of any forms or case notes created.





Delete Chronology

It is possible to delete a Chronology, allowing you to create a new one manually or retrieve one which has been archived

1. Click on **Delete Chronology**



- 2. A warning message will appear. Click **OK** to confirm the deletion.
- 3. The Chronology will be removed.



Archive Chronology

Chronologies can be archived so that other versions of the chronology can be saved for a later purpose (for example, you may want to have a different chronology archived for use in a different situation)

1. Click on Archive



2. Add a comment to describe the chronology and select Create



lew Chronolog	y as of Friday 20 December, 2019	
Archive For: Date Archived	Macdonald, Claire (6 years) 20-Dec-2019 15:14	
Archived By Comments	Worker One - Team 1 Saved for court case	^

The chronology will be archived

Retrieve an Archive

Archives can be retrieved if required.

1. Click on Retrieve Archive

Chronology Archive	
Add Current Chronology to Archive: Archive	Retrieve Archived Chronology: Retrieve Archive

2. Click on the archive you want to retrieve

Archive No	Date Archived	Archived By	Comments
3	20-Dec-2019 15:14	Worker One - Team 1	Saved for court case
4	20-Dec-2019 15:17	Worker One - Team 1	Another archived Chronology

3. A summary of the Chronology will appear. Click Restore Chronology

Chronology as of Friday 20 December, 2019					
Chronology					
Chronology	Event Date	Category	Туре	Event Details	Document Ref
14-Nov-2019 -	14-Nov-201	9 Relationships	New Relationship	New Relationship (Mother) Jackie Macdonald	
15-Nov-2019	14-Nov-201	9 Relationships	New Relationship	New Relationship (Uncle) Benny Hill	
	15-Nov-201	9 Children's Social Care	Form Completion	Placement Search Record, by Sally Cook	
	15-Nov-201	9 Children's Social Care	Form Draft	Case Transfer, by Tony Anagnostopoulos	
25-Nov-2019	25-Nov-2019 25-Nov-2019		Case Note	Contact Type: Case Note Summary, Reason for Contact: This is an example of a case.	
09-Dec-2019	09-Dec-201	9 Health	Health Assessments	Diagnosis of Asperger's Syndrome provided by specialists	
10-Dec-2019 -	12-Dec-201	Home Visit	Meeting	Meeting to discuss care options	
17-Dec-2019	13-Dec-201	9 Case Recording	Case Note	Notes written following meeting	
20-Dec-2019	20-Dec-201	9 Relationships	Relation Address Change	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road	
	zo-Dec-z)1	9 Relationships	Relation Address Change	Change of Address for (Mother) Jackie Macdonald - Primary Address: 107 Spetchley Road	
Restore Chrono	logy				

4. The Chronology will be restored

NOTE: If you try to retrieve a Chronology where the event dates overlap, the option to restore the chronology will be crossed out



	03-DGC-2013	09-Dec-2019	пеаци	nealul Assessmenu
10-Dec-2019		12-Dec-2019	Home Visit	Meeting
	17-Dec-2019	13-Dec-2019	Case Recording	Case Note
will	cannot be restored a overlap with an existi	Relation Address Cl		
		Relation Address Cl		

If you want to restore another Chronology where this happens, you will need to delete the current Chronology (make sure to archive it first, in case you need it for later)