

## Chronology and History Reference Guide

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## 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		New	est Events First	· 🗸	Configure View Creat	te Chronology Add to Chronology		
dditional								
dentity			Date		Category	Туре	Event Details	Actions
Photos			20-Dec-2019		General Events	Address Change	End of Primary Address: 2 The Common Pershore Lane	۹+
lisks	[		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.+
nvolvements CIN			20-Dec-2019		Relationships	Relation Address Change	End of Address for (Father) Tim Macdonald - Primary Address: 2 The Common Pershore Lane	۹+
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	۹+
History			19-Dec-2019		General Events	Address Change	End of Work Address: 9 Harrow Croft	Q +
	1		16-Dec-2010		General Events	Addross Chango	Work Addross: 9 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	tes 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



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- 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 -	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	<ul> <li>Substance Misuses</li> <li>Health Development</li> </ul>	$\Box$ CLA Legal Statuses				
	✓ Demographics	Friends and Family	- Checks	Placements ( all   none )				



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

west Events First 🔪	Configure View	Create 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	۹+
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	۹+
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	<b>q</b> +
-------------	---------------	-------------------------	--	------------



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 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 Parental Factors			Children's Social Care	Form Completion	Placement Search Record, by Sally Cook	
Relationships Involvements	Merge Down	15-Nov-2019	Children's Social Care	Form Draft	Case Transfer, by Tony Anagnostopoulos	
CIN CP	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 Costs	20-Dec-2019	20-Dec-2019 20-Dec-2019	Relationships Relationships	Relation Address Change Relation Address	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road Change of Address for (Mother) Jackie Macdonald - Primary Address: 107	
History	Add New Chrono	logy Group		Change	Spetchley Road	
<u>C</u> hronology	Add New Chrono Print Current Chr					
Shared History Forms	Export Chronolog					
Documents	Export Chronolog Delete Chronolog					

## The Chronology Tab

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

<u>Personal</u>	Chronology					
Personal Additional	Chronology	Event Date	Category	Туре	Event Details	Document Ref
_ Identity		14-Nov-2019	Relationships Relationships	New Relationship New Relationship	New Relationship (Mother) Jackie Macdonald New Relationship (Uncle) Benny Hill	
Photos	Merge Down	14-1007-2019	Relationships	New Relationship	New Reladoriship (oncle) Benny Hill	
Risks Parental Factors	15-Nov-2019	15-Nov-2019	Children's Social Care	Form Completion	Placement Search Record, by Sally Cook	
Relation <u>s</u> hips Involvements	Merge Down	15-Nov-2019	Children's Social Care	Form Draft	Case Transfer, by Tony Anagnostopoulos	
CIN CP	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	
Time Line Chronology Shared History Forms Documents Case Notes	Add New Chrono Add New Chrono Print Current Chr Export Chronolog Export Chronolog Delete Chronolog	logy Item onology gy gy Bundle				



#### 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 Merge Down	09-Dec-2019	Health	Health Assessments	Diagnosis of Asperger's Syndrome provided by specialists	
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 D	own				
10-Dec- 17-Dec-					
Merge D Unmerge					
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	- New Chronology Item
New Group Iter	m
Chronology	Group Item
Date of Event	13-Dec-2019
Category	Case Recording
Туре	Case Note B / U • AAAA X
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 - Update	te: 10-Dec-2019 - 17-Dec-2019
Chronology	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

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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 20-Dec-2019		Relation Address Change Relation Address	Change of Address for (Father) Tim Macdonald - Primary Address: 107 Spetchley Road Change of Address for (Mother) Jackie Macdonald - Primary Address: 107
	_		Change	Spetchley Road

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

Chronology				
Chronology	Event Date	Category	Туре	Event Details
			iew Chronology Group	
14-Nov-2019		Unat	le to create record.	
Merge Down	14-Nov-2019	Relatic		
15-Nov-2019	15-Nov-2019	Childre 15-N	ov-2019 to 15-Nov-2	invalid because it would overlap the following other Chronology groups: 019
Merge Down	15-Nov-2019	Childre	ov-2019 to 25-Nov-2 ec-2019 to 09-Dec-2	
25-Nov-2019	25-Nov-2019	Case Create	Cancel	
Merge Down		<u>C</u> hro	nology	ge
09-Dec-2019	09-Dec-2019	Health	Start Date	15-Nov-2019
Merge Down			End Date	09-Dec-2019 × 🕮
20-Dec-2019	20-Dec-2019	Relatio		
	20-Dec-2019	Relatic	Summari Date Alias	sable Details
Add New Chrono Add New Chrono Print Current Ch	ology Item	Create	Cancel	

#### **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 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       Court Date	<ul> <li>Subject</li> <li>Child: Betty Heinz</li> <li>Notes / Comments / Review</li> <li>Notes</li> <li>Access Control</li> <li>Restrictions None Selected</li> <li>Specify Access and Restrictions</li> <li>Administrative Actions</li> <li>Administrative Actions</li> <li>Motification</li> <li>Motification</li> <li>Wrs Gurpreet Kumari - Centre Professional Practice</li> <li>Update Notifications</li> <li>Notify Involved Professionals</li> </ul>			
	Court Name Court Case Number Applicant First Respondent Second Respondent Third Respondent Create Document				

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	lls
Audit	Document Type Date Editor Status File Document Number • Update Details • Delete Draft Docu • Complete Document • Edit Locally • Download Document	20-Dec-2019 Worker One - Team 1 Draft .rtf 201 KB 11113565 ument ent

 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
	<ul> <li>Edit Locally</li> <li>Download Document</li> <li>Upload Document: Browse</li> </ul>

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



ersonal	+ Cn	Create/Attach Document									
dditional	No filter applied - 5 records.										
dentity		Date	Category	Турс	Status	Team	Editor	Notes	Download		
'hotos Risks	1		Court Document	Court Document version of Chronology	Completed		Worker One	Document for court	Download the document		
arental Factors	2	15 Nov 2010	Form Attachmont	Form Attachment	Completed	Worcectorchire County		attachment	document docx		
telation <u>s</u> hips nvolvements	3	14-Nov-2019	Adoption Document	Health Assessment / Health Records	Completed	Council Worcestershire County Council	Anagnostopoulos Tony Anagnostopoulos	Letter from GP	GP letter.docx		
IN P	4	07-Nov-2018	Adoption Document	Education Document	Completed	Worcestershire County Council	Tony Anagnostopoulos	Attendance letter	Attendance concerns.docx		
LA	5	06-Nov-2017	Adoption Document	Education Document	Completed	Worcestershire County Council	Tony Anagnostopoulos	Claire's grades 2017	Claire's grades.doc		
doption osts											
istory											
ime Line											
hronology											
hared History											

#### 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 Landsca	pe   Small Mediu	m Large L	argest   Print pa	age 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:				I.		ey			
Child: Betty Heinz									
Full Name		Betty Heinz	Betty Heinz						
Date of Birth		01-Jan-2020	01-Jan-2020						
Case Number		701612	701612						
Gender		Female	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-Jan-2020									

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-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	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	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					
Chronology	Event Date	Category	Туре	Event Details	Document Ref
14-Nov-2019 -	14-Nov-2019	Relationships	New Relationship	New Relationship (Mother) Jackie Macdonald	
15-Nov-2019	14-Nov-2019	Relationships	New Relationship	New Relationship (Uncle) Benny Hill	
	15-Nov-2019	Children's Social Care	Form Completion	Placement Search Record, by Sally Cook	
	15-Nov-2019	Children's Social Care	Form Draft	Case Transfer, by Tony Anagnostopoulos	
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.	
09-Dec-2019	09-Dec-2019	Health	Health Assessments	Diagnosis of Asperger's Syndrome provided by specialists	
10-Dec-2019 -	12-Dec-2019	Home Visit	Meeting	Meeting to discuss care options	
17-Dec-2019	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	

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



05	a-Dec-201a	09-Dec-2019	nealui	nealul Assessment
10	0-Dec-2019 -	Meeting		
17	7-Dec-2019	13-Dec-2019	Case Recording	Case Note
This car		· · · · · · · · · · · · · · · · · ·	ind Channels and its and	
i nis car	nnot be restored a	is one of the arch	ived Chronology items	Deletion Address Of
	nnot be restored a erlap with an existi			Relation Address C
		ng Chronology it		Relation Address C Relation Address C

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)