Notes - Service request/case/contacts

Notes is the 2012 system note recording tool. This procedure explains how to record notes when required to do so.

This facility will be available to all new 2012 scheme users.

All 2012 scheme cases are updated by the raising of service requests (SRs). Each SR contains an activity plan, clearly detailing the actions that have been taken at each step of a case. Some SRs contain a text box for users to record additional information. This relieves the need for users to create additional notes entries as each SR details clearly the steps taken on a case and any decisions made. Notes are only ever required if a decision or discretionary decision has been made. These decisions require more detailed notes to be recorded against the SR to support the decision

For more information on discretionary decisions refer to the Policy, Law and Decision Making Guidance.

When confirming a confident address decision at the application stage, record the decision and any further supporting information in the paying parent contact notes.

Notes entries will not be used to record or support every action taken on a case. Notes are to be used in moderation and only when you need to add clarity to a decision or action as additional support to your SR. For example you would not record a notes entry to advise that you have raised an SR or to duplicate an action that has been recorded within an SR as this will be clear from the system. You will create a notes entry when making a discretionary decision on a case that requires the full decision to be recorded, that cannot be fulfilled supported by the notes within an SR or activity plan.

On some occasions CMS2012 may show a prompt asking if the note is to be private or public. Never select private. All notes must be public due to data protection laws.

A guide has been developed to further help with this. For information refer to Notes in the Fundamentals page in the Enhanced Support Model

Recording system notes

1. All 2012 scheme cases will be updated by the raising of service requests (SRs). Within SRs there is an activity plan detailing each action that is required before the SR can be completed.
2. The system has a comprehensive list of SRs and there is an SR available for every situation.
3. If you feel that your decision requires more clarity than the SR can provide or the information from the SR alone does not fully cover your decision or action taken, you are able to make an entry in notes and attach it to the SR to support your decision.
4. Each notes entry can hold 1750 characters. You do not need to leave your name, initials or team location as part of the note as your user details are logged against your entry. If you require more space to record your note, you will need to create an additional notes entry.
5. All SRs that have been created for a case are held within the 2012 system and you are able to view each SR regardless of the status, for example ones that are open, closed and in progress. This provides users with a detailed log of the actions taken and notes relating to each SR.
6. When making certain decisions on a case, a specific entry must be entered to make sure any legislative requirements are met. Normally these come in the form of a discretionary decision and must be entered verbatim, the policy, law and decision making guidance will generally hold these but some are recorded in procedures for clarity. For more information refer to Evidence and decision making in the policy, law and decision making guidance.

How to record an entry in notes

7. When you need to add a notes entry on the system you will attach the notes activity to an SR. Record the entry against one of the following business areas:
   - Contact
   - Case / Casegroup
   - Service Request (SR)
   - Activity
   - Incident – This is restricted to enforcement cases only

You should not feel the need to support any decisions you make within SR text by duplicating the entry in general notes. The SR provides all information required and enables faster access to this information for future users.

8. Notes are attached to an activity via an SR and you determine from the reason for making the notes, the area that you add them to.

9. The following steps detail how you record an entry within notes.

   On some occasions CMS2012 may show a prompt asking if the note is to be private or public. Never select private. All notes must be public due to data protection laws.

10. From the SR View Tab, select the SR that you need the notes to be added to. If there isn't an appropriate SR to add your notes, a new one will need to be created for the appropriate area.

11. Once the SR hyperlink has been selected, select the **Notes** tab. If this is not shown within your tab display, select the drop down option at the end of the tool bar to detail additional tabs.

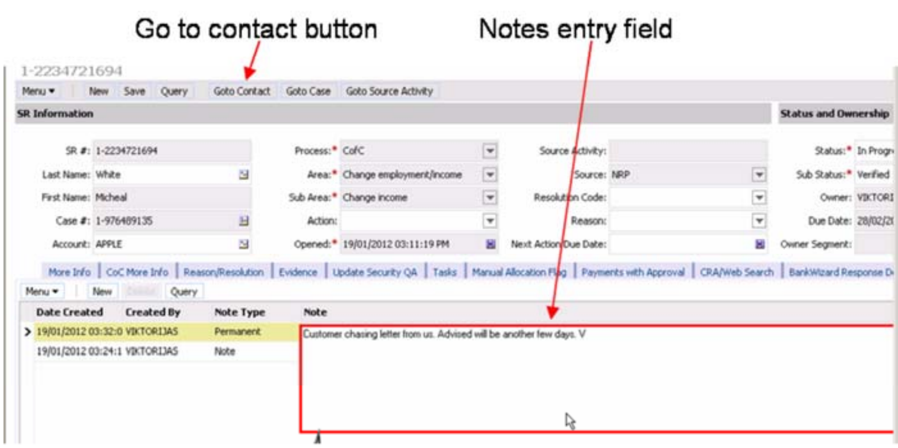
12. The screen shot below is an example of the drop down options, select the notes option.

13. This takes you to the **Notes** screen. Select the new **Notes** tab to produce a drop down list of the type of notes that can be recorded, select the type you require from the list of options available:

    - **General**: captures all notes not associated to one of the other types
    - **Decision**: captures notes where a caseworker has to record a decision or justification
    - **Telephony**: captures notes that have been made on both inbound and outbound phone calls
    - **Financial**: captures all notes associated to any financial transfers including payments

14. Once selected enter your notes. When completed select the **Go to Contact** button from the tab bar.

15. The screen shot below shows an example of what the notes entry will look like and also the location of the go to contact button.



16. The **Go to Contact** button takes you back to the list of SRs and re select the SR that you require the notes activity to be added to.

17. The system then attach the notes to this SR. This ends the process.

To view system notes select the **Notes** tab as in **step 2**, you are able to filter the type of notes you view from a list, for example there is the option for **General**, **Decision**, **Financial** and so on.

All screen shots are for illustrative purposes only and do not contact actual client data.

2012 System Overview

Fundamentals

Terminology Changes

Can information taken from CRA be recorded in the notes fields of the 2012 system?

Yes, any information held on CRA can be pulled across to the notes field as it wil be deemed as correct at the time.

When will the caseworker need to use note entries?

The caseworker will use note entries when they need to add clarity to a decision or action as additional support to their service request.

Will the caseworker need to put their name, initials or team location in the notes entry?

No, the caseworker details will be logged against their entry.

Is there a character limit within the notes field?

Yes, there is a limit of 1750 characters per notes field.

Can another notes entry be made if the caseworker runs out of space for the notes?

Yes, if you require more space to record your note, you will need to create an additional notes entry.