

Transfer of Case Notes & Forms from eCAF to ICS

Client	eCAF & ICS Client Base
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Document Distribution

Document History

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1. Introduction

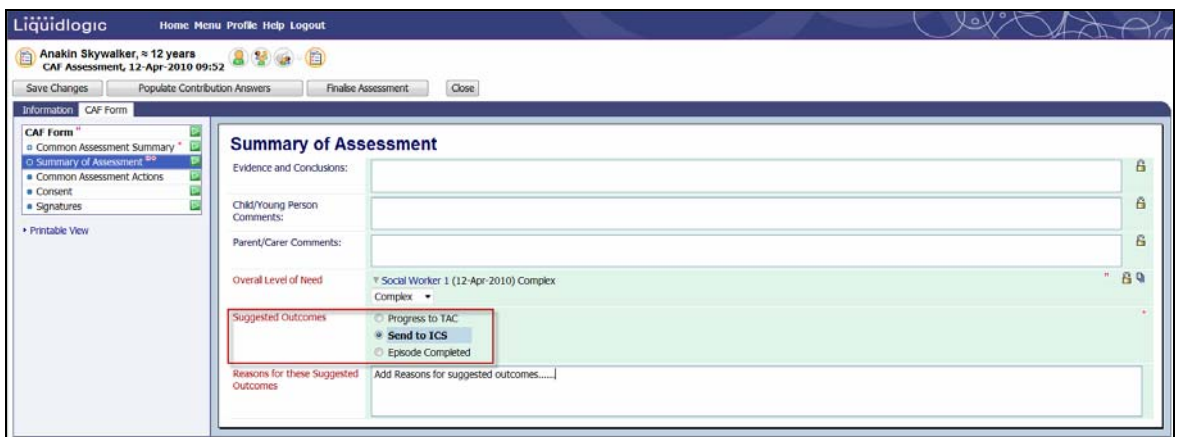
For customers that have a linked eCAF & ICS system, Liquidlogic have added the functionality to transfer Case Notes and Forms (not Letter Templates) created as part of the eCAF episode to ICS along with the CAF Assessment.

This document attempts to detail the steps required to transfer Case Notes and Forms (not Letter Templates) from eCAF to ICS when a CAF episode is being transferred to ICS.

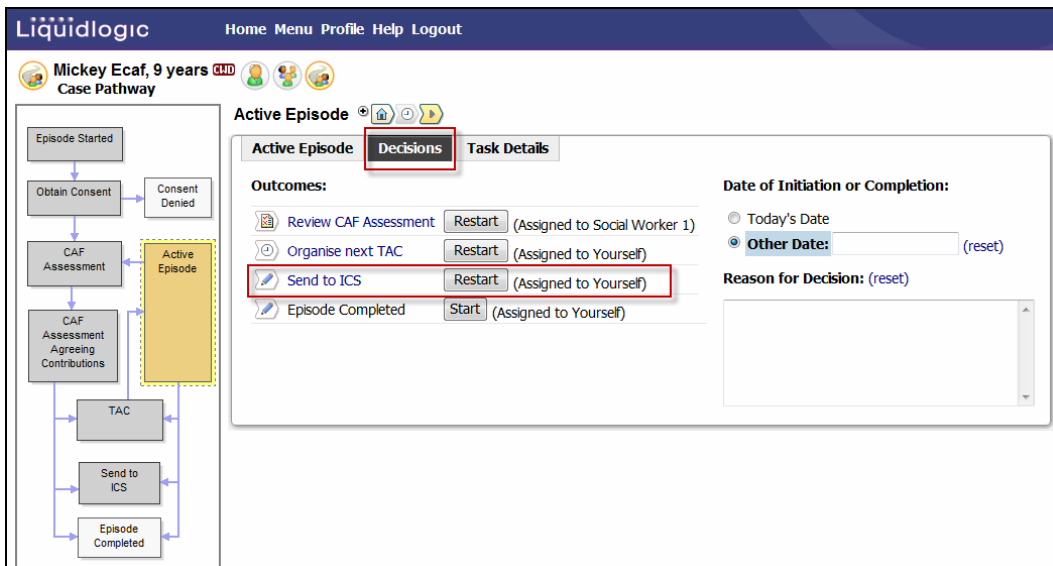
NOTE – for the Form transfer to work, the template of the form (i.e. the xml file) must be both system configurations. If a form is only present in the eCAF system then the functionality to move a Form from eCAF to ICS will not work.

2. Transfer Case Notes & Forms from eCAF to ICS

1. The process to transfer a CAF episode to ICS can be started either from within the CAF Assessment

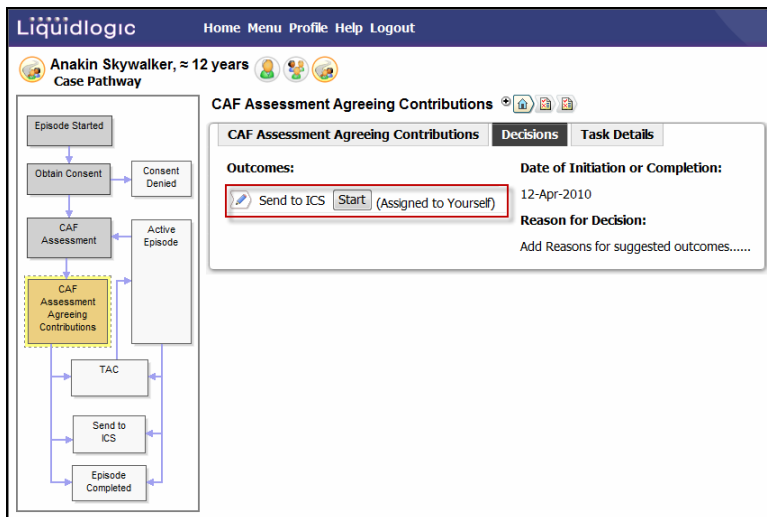


Or as an outcome from the "Decisions" tab.

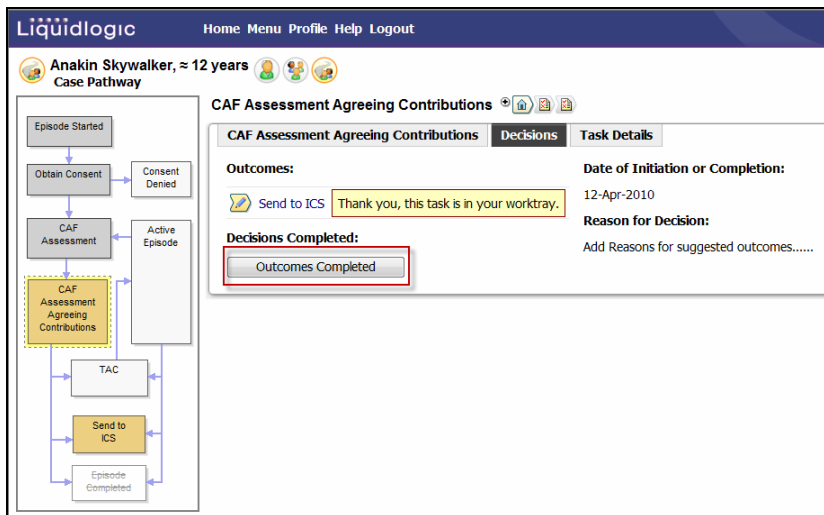


The below example is started from within a CAF assessment.

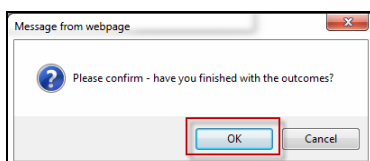
2. Select "Start" to create the task to transfer the CAF episode to ICS.



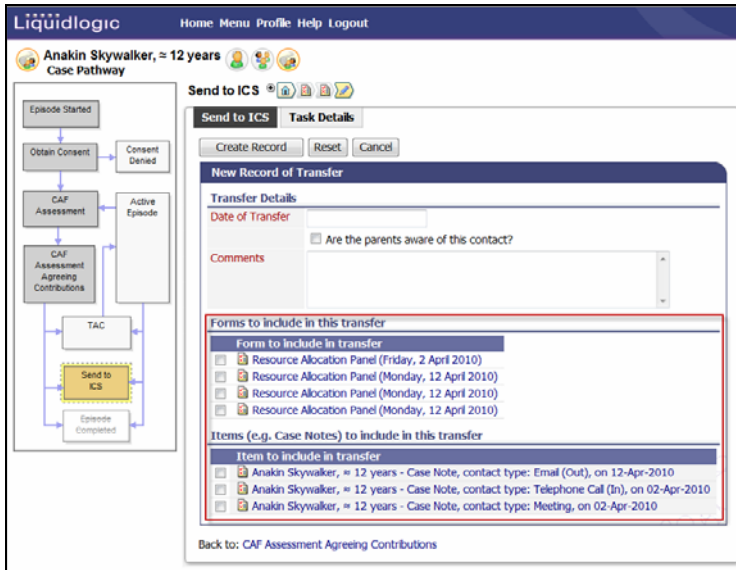
3. Select "Outcomes Completed"



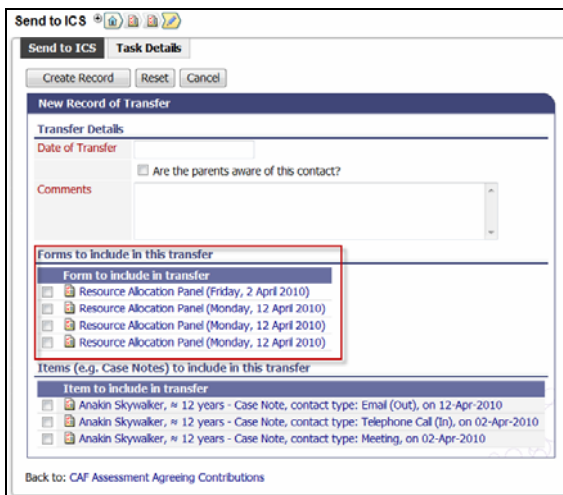
4. Select "Confirm" to finish the Outcomes.



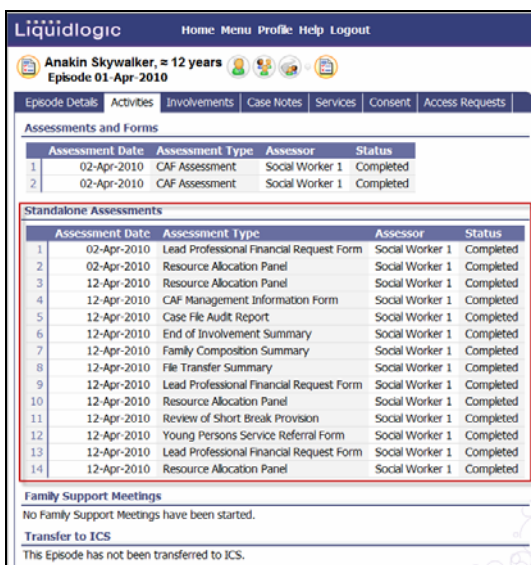
- When the task to Transfer to ICS is started the user is presented with a choice of which forms (completed assessments) and Case notes to transfer to ICS.



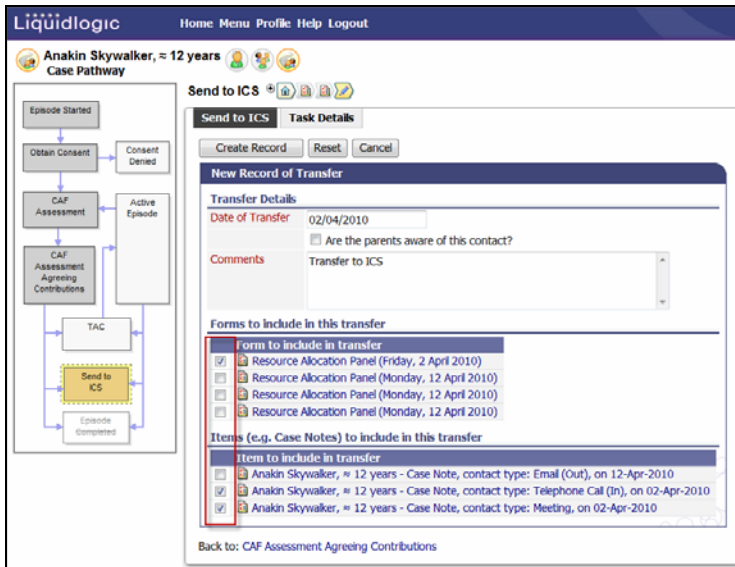
eCAF will only display those forms that are able to be transferred to ICS. In the example being shown only the “Resource Allocation Panel” form is being displayed.



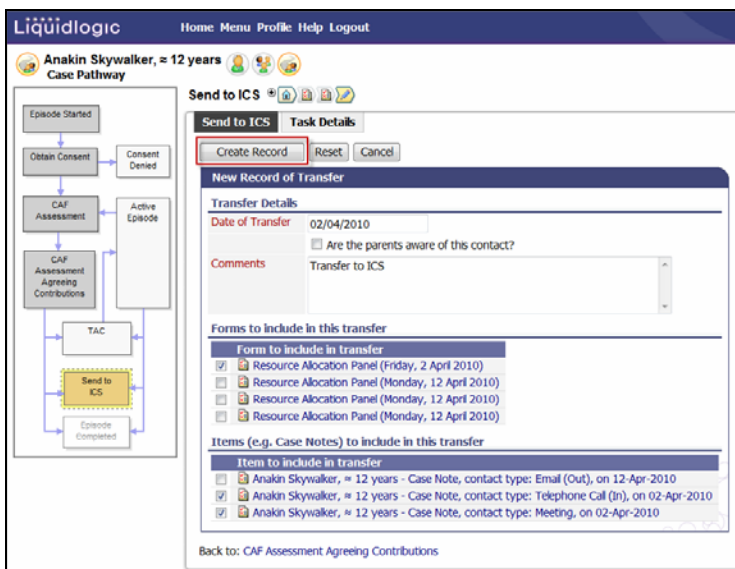
Even though there have been many assessments recorded on the CYP’s record.



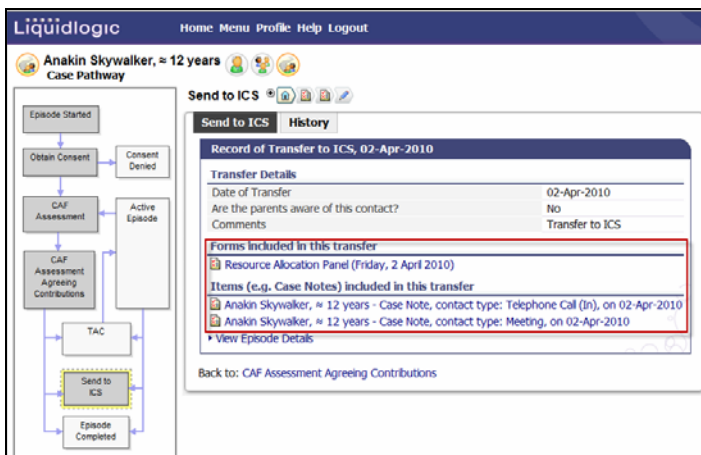
6. Select the individual Case Notes and Forms to transfer to ICS



7. Select "Create Record"



8. eCAF will then confirm what has been transferred to ICS



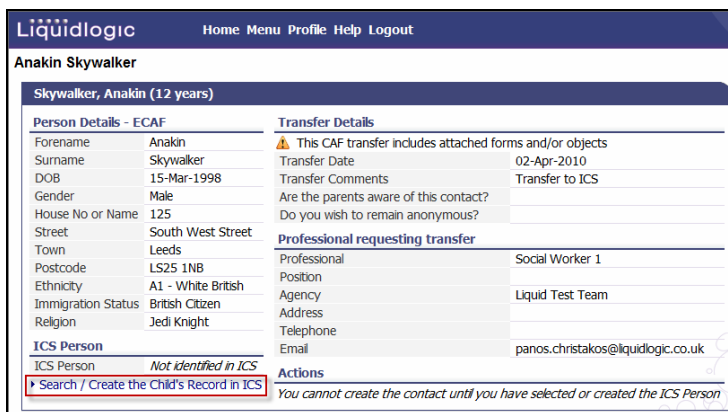
3. Picking up Transferred Case Notes & Forms in ICS

When a CAF episode is transferred to ICS, the transfer task is placed in a group tray (this is configured differently per customer).

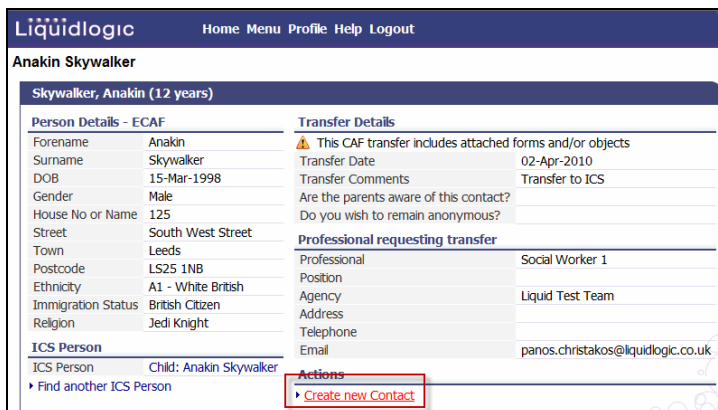
1. Go to the Group Tray where the transferred CAF episodes are configured to be delivered and select "Pickup"



2. Follow the normal process of finding the Child / Young Person in ICS





3. Then create a Contact by selecting "Create new Contact"



Looking at the "Case Notes" tab of the ICS Demographics the user will see the eCAF Case Notes transferred from eCAF.



And the Forms tab displays the Form copied from eCAF.

Personal	Additional	Identity	Risks	Parental Factors	Relationships	Involvements	Case Status	CP	CLA	History	Chronology	Forms	Case Notes
 Forms													
Free Text Filter <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Reset"/>													
Draft Forms													
02-Apr-2010, Contact Record by Social Worker 1 - Liquid Test Team													
Completed Forms													
02-Apr-2010, Resource Allocation Panel by Social Worker 1 - Liquid Test Team													
02-Apr-2010, CAF Assessment by Social Worker 1 - Liquid Test Team													
Cancelled Forms													
None													
 Attached Documents													
There are no documents.													
Actions													
▶ Create Document													