

Recording a Contact

Recording a Contact in Insight.

DCSF guidance around contacts

The main function of the IO Insight system is to allow PA's to record the work that they do with young people. The contacts that you have with young people can range in duration and content. The question is often asked as to what to record and what to leave out. The DCSF offer the following guidance when considering what to count as a contact (intervention):

“In order to count as an intervention there needs to be some element of assistance involving a substantial or meaningful exchange with the young person. It should be of enough significance to be noted in their client record. “

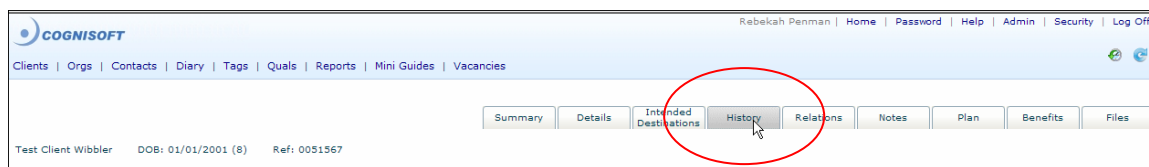
DCSF CCIS Requirements 2008-9

Although we have the facility to record work done on behalf of the client, the DCSF do not count or record these as a contact (intervention). The work done on behalf of a client, such as contacting other agencies or attending multi agency meetings, is recorded on the system to allow PA's a way of making notes that might have an impact on the casework that they are undertaking. They are not reported up to DCSF.

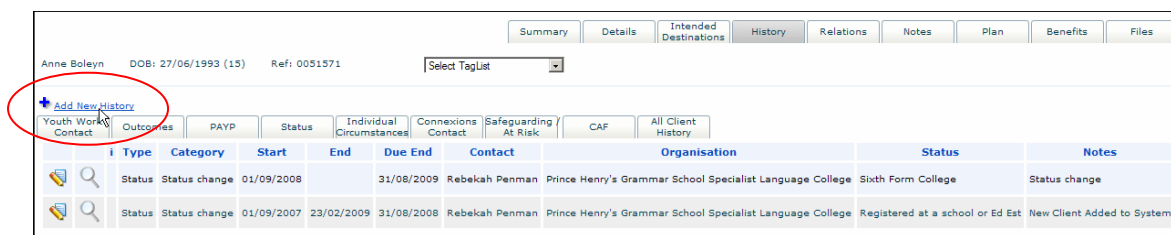
The DCSF also issue guidance around the recording of work done by e-mail or text message. They are clear that these exchanges should be dealt with in much the same way as a face to face contact, in which you wouldn't count each piece of dialogue as separate. As such, most text and e-mail exchanges that are on one topic should be counted as one intervention.

How to record a contact

All of the work that you record with a young person is recorded under the [History](#) tab on the [Client](#) record. (The [Contacts](#) link on the very top of the screen is used to record and search for information relating to staff belonging to the various organisations within the IYSS not to record contacts with young people).



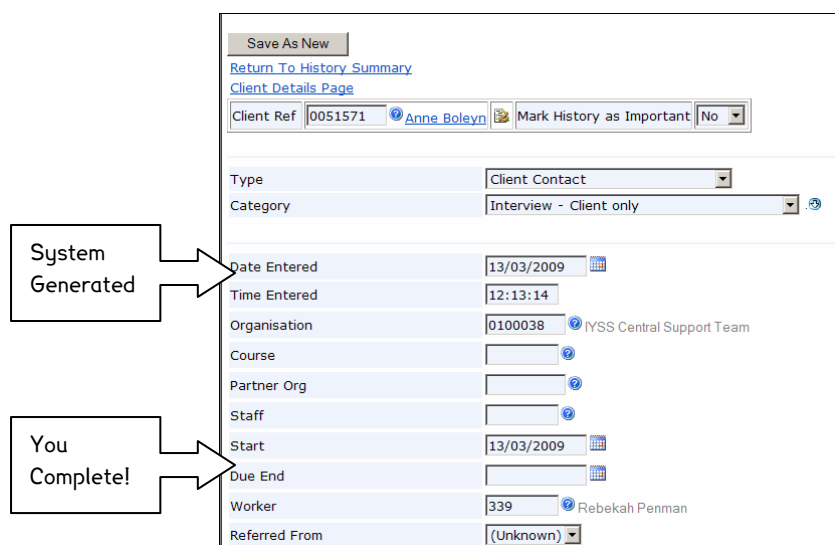
Once you have clicked on the **History** heading in the Client record, you should get a screen that gives you an overview of any existing contacts, status changes and other information such as Individual Circumstances and At Risk categories.



To record a contact, click on the **Add New History** link. This will open up a new page where you choose **Client Contact** from the **Type** drop down. This will bring up a range of **Categories** to suit the contact that you are recording.

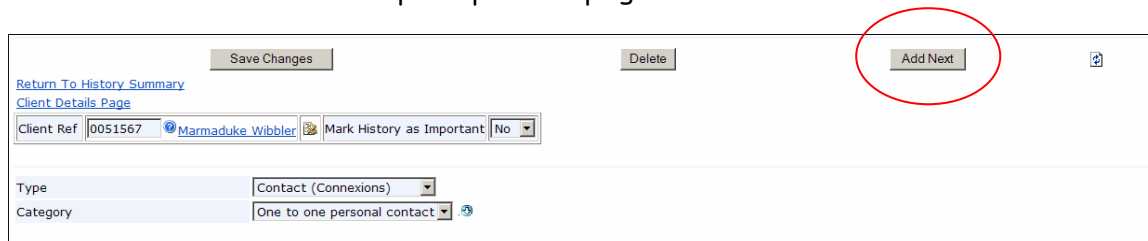
Note: Contacts (Interventions) will not save without a Type and a Category.

Once you have selected a **Type** and a **Category**, you need to scroll half way down the page and complete the **Start** and **Due End** date boxes. (There is a date and time box at the top of the page but these are computer generated dates and cannot be changed).



Notes on what each of these date boxes means can be found in the IO102_Due End Date mini guide. PDF. The Due End Date is of particular importance and must be filled in where appropriate.

Underneath, the **Notes** box is for adding the detail of the intervention with the young person. Once you have completed the notes, click **Save As New** and this will save the record. If you wish to add another intervention in to the same client, you can use the **Add Next** button which will open up a new page.

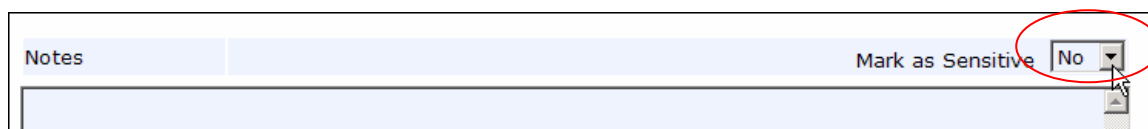


The screenshot shows the top section of the IO102 interface. At the top right, there are three buttons: 'Save Changes', 'Delete', and 'Add Next'. The 'Add Next' button is circled in red. Below the buttons, there are links for 'Return To History Summary' and 'Client Details Page'. The 'Client Ref' field contains '0051567' and the client name is 'Marmaduke Wibbler'. There is a 'Mark History as Important' dropdown menu currently set to 'No'. Below this, there are fields for 'Type' (set to 'Contact (Connexions)') and 'Category' (set to 'One to one personal contact').

Marking notes as sensitive

Because the system is shared throughout the IYSS, we need to be mindful of what we record and how we record it so that we can protect the privacy rights of the individual whilst still sharing necessary information. If you have notes that you wish you to record that you would not wish other system users to view, you can mark them as sensitive. Other people would be able to see that a contact had taken place but they would not be able to see the details discussed.

To mark notes as sensitive, when you have the new contact page open, at the bottom of the page above the **Notes** field is a drop down field called **Mark Notes as Sensitive**. Ordinarily this will default to **No**, by clicking on the drop down and changing it to **Yes**, your notes will not be able to be viewed by other users.



The screenshot shows the bottom section of the IO102 interface. On the left, there is a 'Notes' field. On the right, there is a 'Mark as Sensitive' dropdown menu currently set to 'No'. The dropdown menu is circled in red.

Marking a contact as important

It is possible to highlight a record that is of particular importance so that you notice it more easily. To do this, when you have the new contact page open, at the very top, next to the client name is a field which says **Mark History as Important**.

[Return To History Summary](#)
[Client Details Page](#)
 Client Ref: 0051567 Marmaduke Wibbler Mark History as Important: **No**

If you select **Yes** from the drop down box, this will mark the history with a star when you view the **History Summary** page:

Summary									
Anne Boleyn DOB: 27/06/1993 (15) Ref: 0051571									
Select TagList									
Add New History									
Youth Work Contact Outcomes PAYP Status Individual Circumstances Connexions Contact Safeguarding At Risk CAF All Client History									
	Type	Category	Start	End	Due End	Contact	Organisation	Status	Notes
	Status	Status change	01/09/2008		31/08/2009	Rebekah Penman	Prince Henry's Grammar School Specialist Language College	Sixth Form College	Status change

It will also highlight the contact on the Client **Summary** page:

[Summary](#) [Details](#) [Intended Destinations](#) [History](#) [Relations](#) [Notes](#) [Plan](#) [Benefits](#) [Files](#)

Anne Boleyn DOB: 27/06/1993 (15) Ref: 0051571 Select TagList

Add Actions

- + Consent (0)
- + Status (2)
- + Client Contact (0)
- + Change of Data (0)
- + Other Contact (0)
- + Follow Up (0)
- + Information Requests (0)
- + Outcomes (0)
- + Individual Circumstances (0)
- + Vacancy Matching - Submission (0)
- + Vacancy Matching - Conclusion (0)
- + Client Referrals (0)

Contact Details

Address: 223 Hampton Court Road, , Leeds, LS55 5LS
 Phone: 0113 2145889
 Mobile:
 Email: theotherboleyn@hotmail.com
 Lead PA: Rebekah Penman (0113 2145882)

Important Histories

01/09/2008	Status - Status change	Status change
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More Sections

- Plan
- Quals
- Consent
- Match
- Survey

Remember, if the status of the young person has changed from what is currently showing on the system, you must log the status change **BEFORE** you record the contact. See the Status Change Mini Guide for details