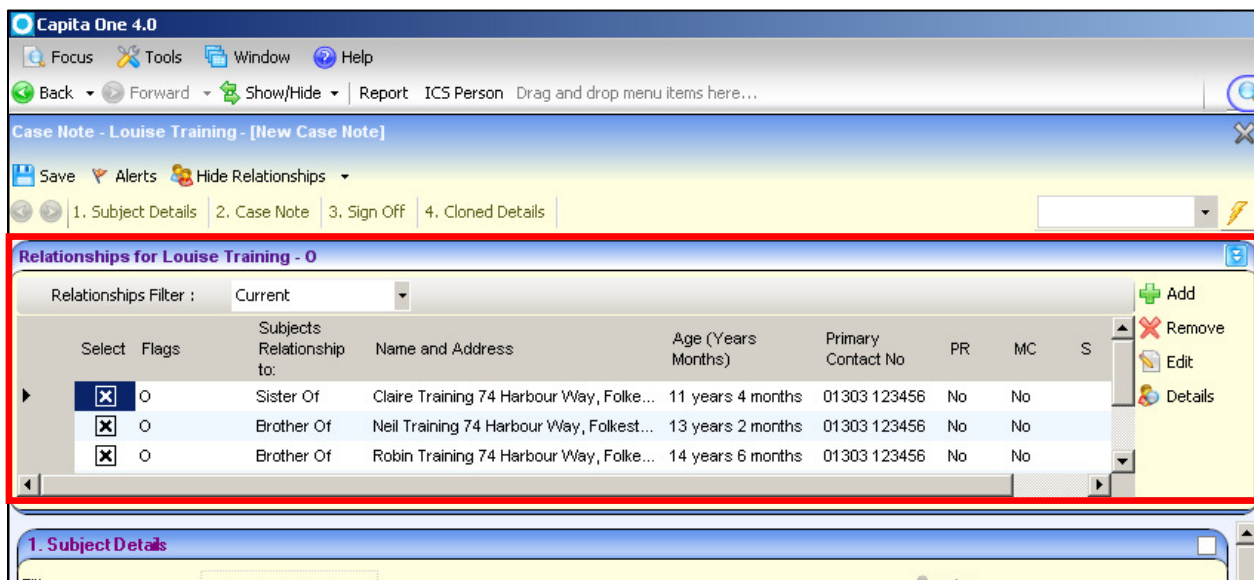


Copying Contacts, Exemplars and Case Notes

The **Relationships panel** provides functionality that enables the copying of Contact Records, Exemplars and Case Notes – the **Generate** and **Copy Forward** buttons.



Generate is available at the point of creation *before* saving a Contact, Case Note or Exemplar. **Copy Forward** is available *after* a Contact, Case Note or Exemplar has been saved.

At the point of creation of the record the user can:

- Edit the **Relationships panel**
- Select the individuals who are listed in the **Relationships panel** to whom the **Case Note** (Contact Record or Exemplar) will be copied and use the **Generate** function
- Complete the **Case Note** (Contact Record or Exemplar), save and use the **Copy Forward** function

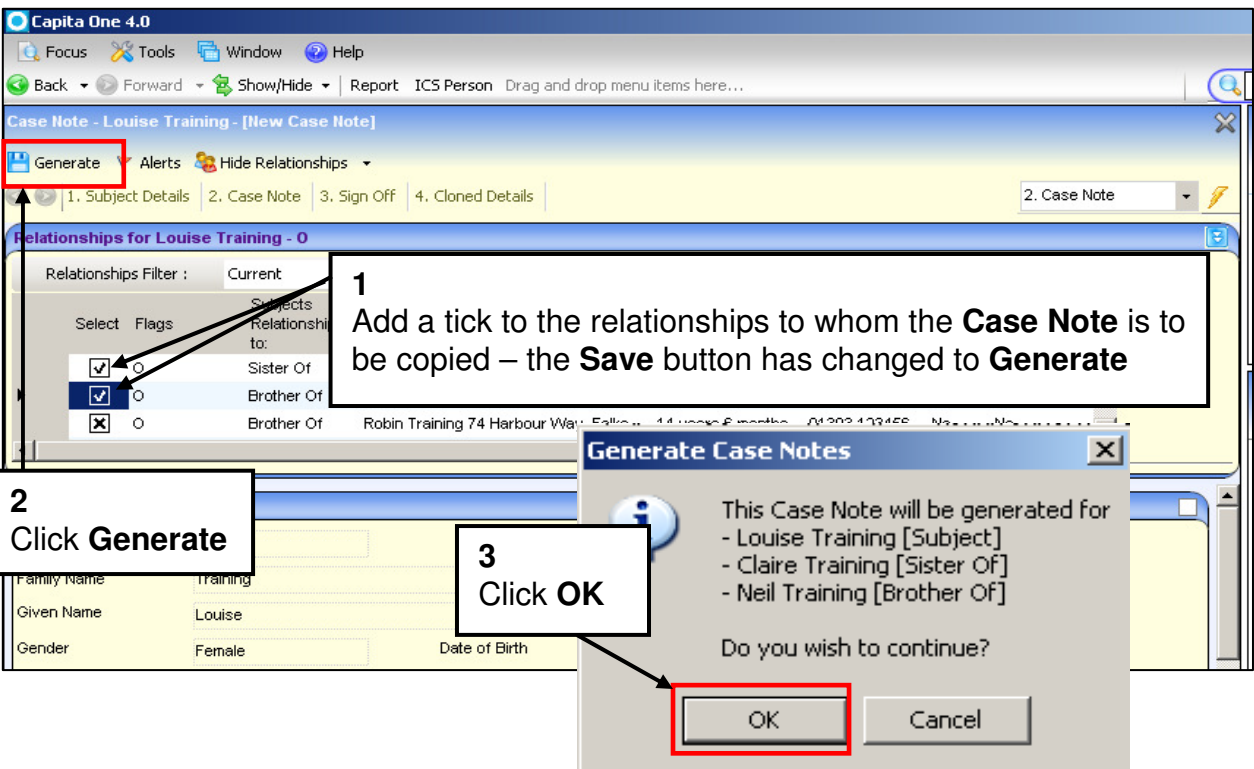
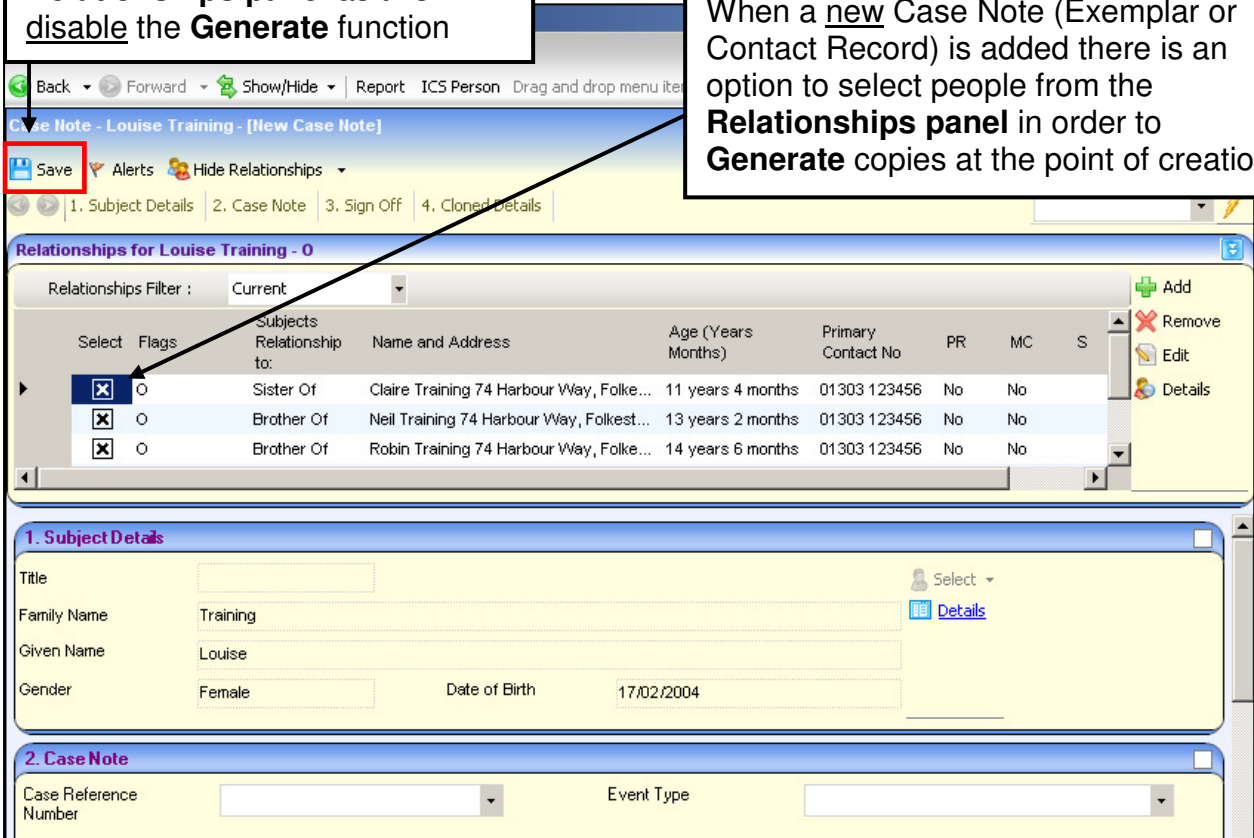
Both **Generate** and **Copy Forward** will be demonstrated here, but the recommendation, particularly with Exemplars, *is to save first and then use the Copy Forward function*. This will ensure data is saved safely before attempting to copy to siblings.

This guide demonstrates the use of **Generate** and **Copy Forward** within a Case Note – the functionality remains the same with Contacts and Exemplars.

To use the Generate function

Important - Do not click Save before selecting people from the Relationships panel as this will disable the Generate function

When a new Case Note (Exemplar or Contact Record) is added there is an option to select people from the **Relationships panel** in order to **Generate** copies at the point of creation

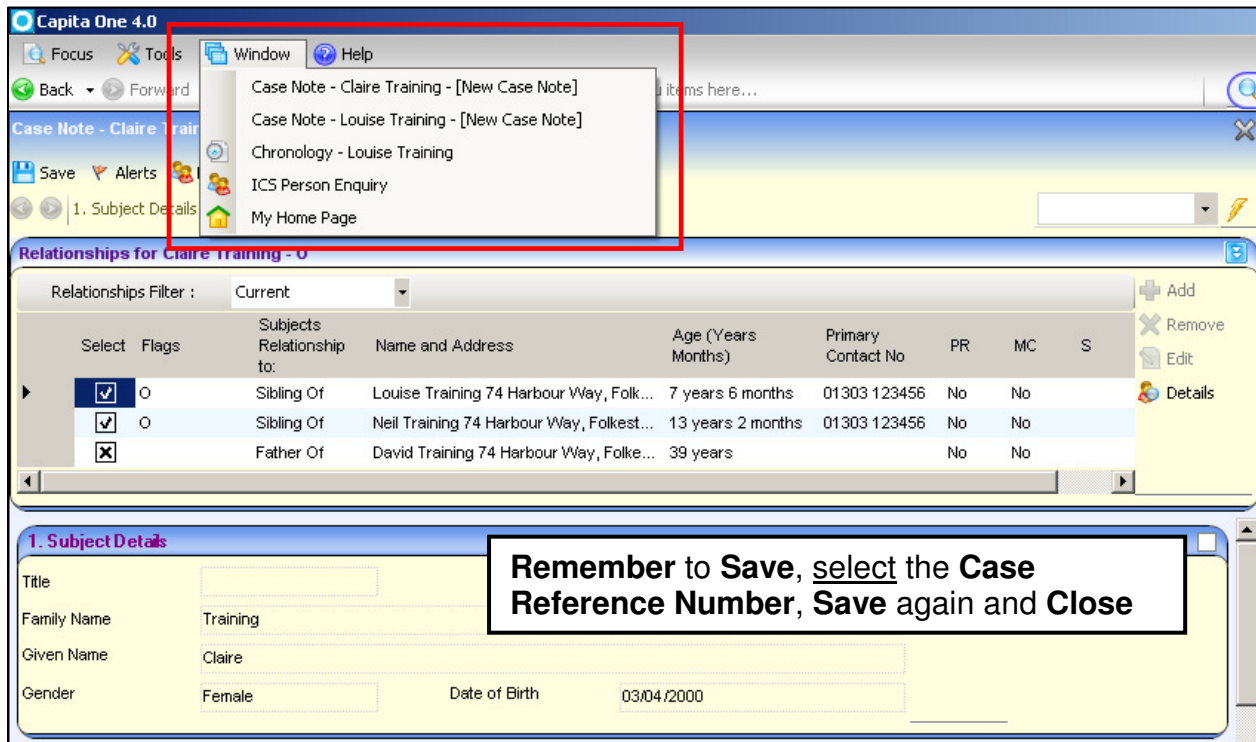


Note – at this point, the **Case Notes** for the three siblings have not been saved but have been **Generated** (copied) and are stacked one on top of the other ready for review and individual editing as required

The screenshot displays the Capita One 4.0 interface. A red box highlights the 'Window' menu, which lists three generated case notes: 'Case Note - Neil Training - [New Case Note]', 'Case Note - Claire Training - [New Case Note]', and 'Case Note - Louise Training - [New Case Note]'. A callout box points to this menu with the text: 'The **Window** menu will list the **Generated** (copied) Case Notes'. Below the menu, a table shows subject details with columns for 'Subjects', 'Relationship', 'Name and Address', 'Age (Years Months)', 'Primary Contact No', 'PR', 'MC', and 'S'. A callout box with the number '4' instructs: 'Click **Save** – the **CRN** is not available to select before the **Save** button is pressed. Select **Case Reference Number**. Click **Save**'. Below the table, a form contains fields for 'Family Name' (Training), 'Given Name' (Neil), and 'Gender' (Male). A callout box with the number '5' instructs: 'Click **Close**'. At the bottom, a '2. Case Note' section shows a 'Case Reference Number' dropdown menu, 'Event Type', and 'Managers Comments' fields. A callout box with the number '4' also points to the 'Save' button in the top left.

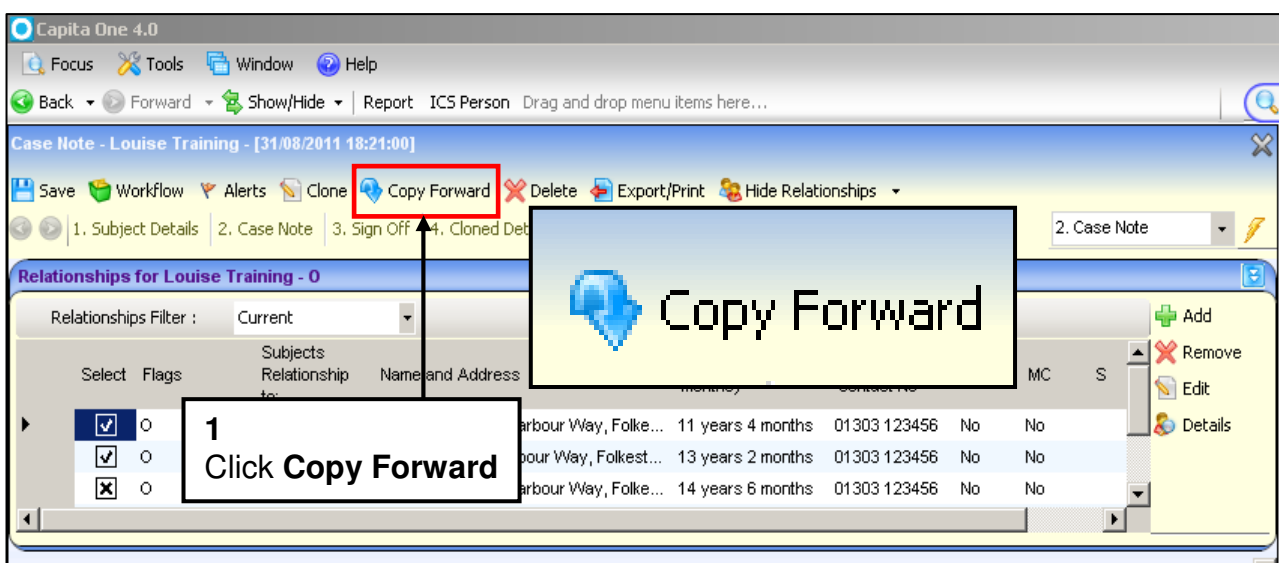
Subjects	Relationship	Name and Address	Age (Years Months)	Primary Contact No	PR	MC	S
Folk...			7 years 6 months	01303 123456	No	No	
Folke...			11 years 4 months	01303 123456	No	No	

Note – when the **Case Note** is closed the next **Case Note** from the stack is displayed - in this example, the **Case Note** for Claire Training, as shown below:



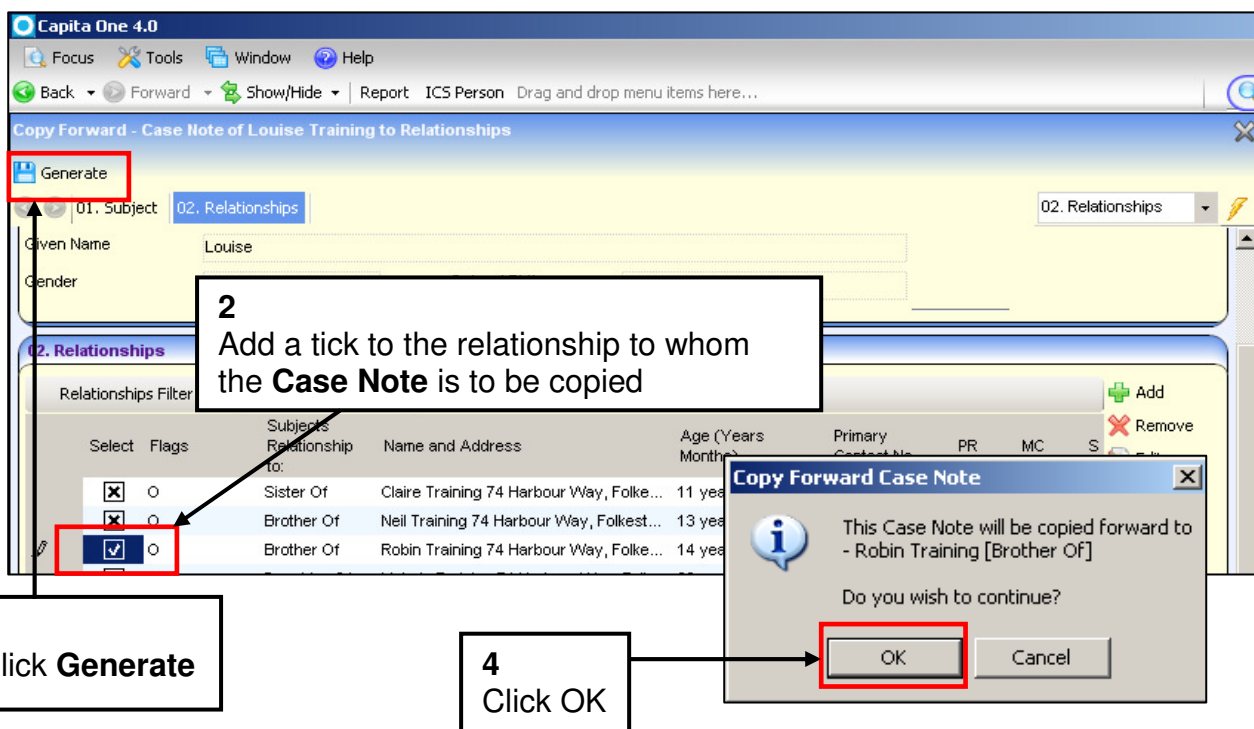
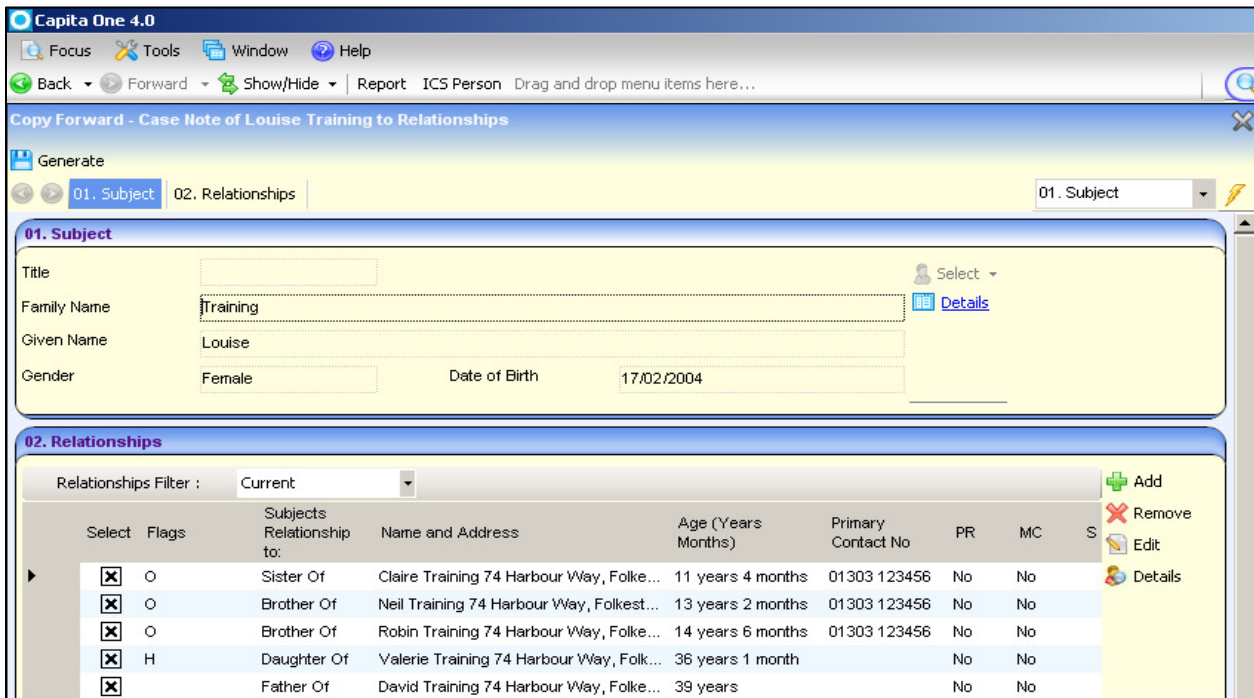
When the original **Case Note** is displayed, in this example for Louise, click **Save** and check the message in the bottom left corner **Case Note Saved Successfully** is displayed

To use the Copy Forward function



The **Copy Forward** function can be used when a Contact Record, Exemplar or Case Note has been saved and then needs to be copied (cloned)

When the **Copy Forward** button is activated, the following screen is displayed:



The **Case Note** for Robin is now displayed as shown below:

5
Save, add the CRN and Save again

6
Click Close

Case Note - Robin Training - [31/08/2011 18:21:00]

Save Workflow Alerts Clone Copy Forward Delete Export/Print Hide Relationships

1. Subject Details 2. Case Note 3. Sign Off 4. Cloned Details

2. Case Note

Relationships for Robin Training - 0

Relationships Filter : Current

Select	Flags	Subjects Relationship to:	Name and Address	Age (Years Months)	Primary Contact No	PR	MC	S
<input checked="" type="checkbox"/>	0	Sibling Of	Louise Training 74 Harbour Way, Folk...	7 years 6 months	01303 123456	No	No	

1. Subject Details

Title

Family Name Training

Given Name Robin

Gender Male Date of Birth 25/02/1997

2. Case Note

Case Reference Number 2011Cont075292 - Open

Event Type Managers Comments

Date 31/08/2011 Time 18:21

People Present Fiona Gilbert

Case Note saved successfully

Version 4.344.0.4438 https://KENT568W3/CCSEnterpriseApplicat

When the **Case Note** for Robin is closed, the **Case Note** for Louise will be displayed and needs to be closed

Please note – the **Create New** function can still be used to clone as in the previous version of ICS