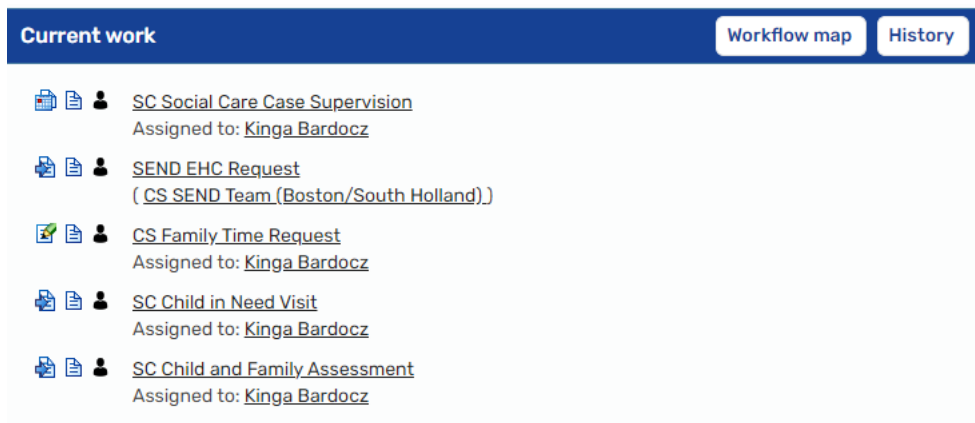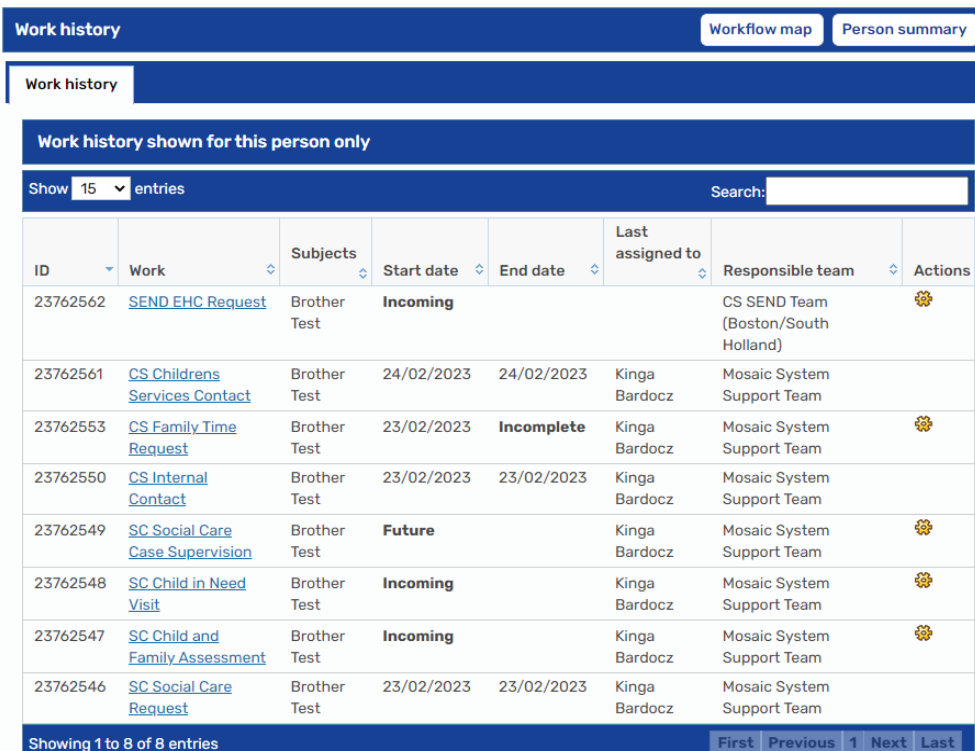## Children's Services Quick Guide

Using the Work History

The **Work history** displays all worksteps that are complete, incomplete, or scheduled for future completion on a person or group. To access the **Work history** for an individual, you must navigate to the Current work box on their **Person summary** screen.

Click on the **History** button to display a workflow history:

Clicking on the **Person Summary** button will close the list.

The same process would be followed to access the work history of a group – navigate to the **Group Summary** and click the **History** button in the Current Work box. To close the list, click on the **Group Summary** button.
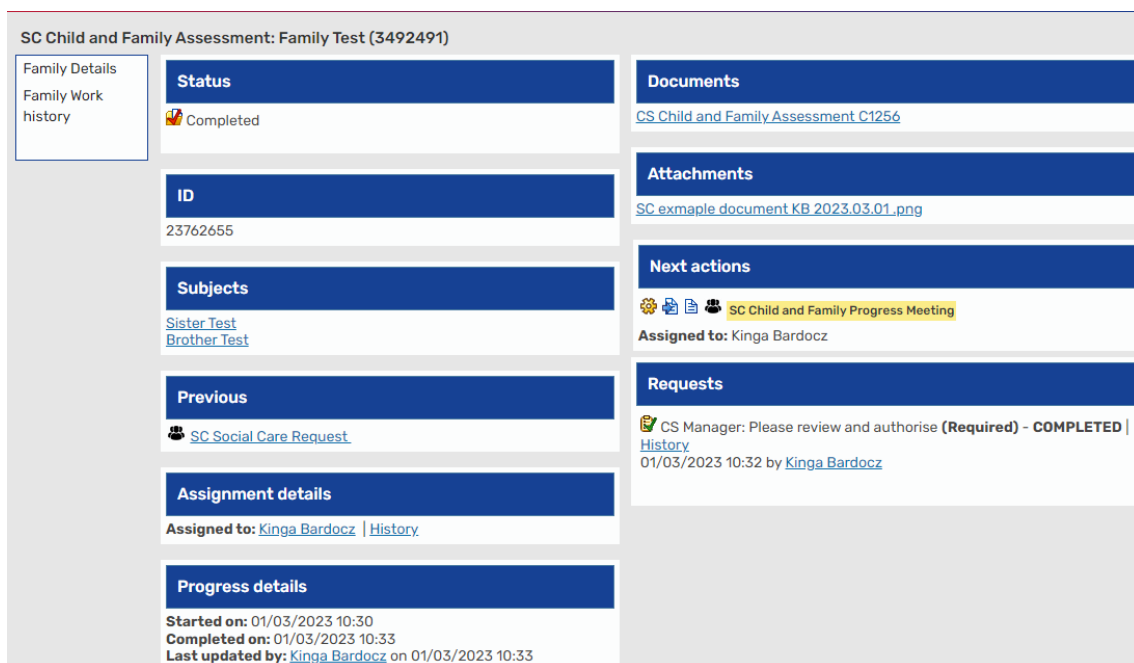
The list of worksteps will display as blue hyperlinks. If the workstep has been completed it will have a start and end date recorded. Others will display as **Incoming**, **Future**, or if they have been started will display as **Incomplete** with a start date.

The page will default to display 15 records per screen. This can be amended using the options available in the **Show entries** field in the top left corner of the screen.
The **Search** field can be used to filter the results by entering text or a specific date.

When a 🔆 yellow cog icon appears on the **Work history** screen, clicking on this will give the user the option to **Start work** if the workstep has been assigned to them.

Clicking on any of the hyperlinks will open a **Workstep summary** screen which will display all the documents that have been completed as part of that Workstep.

In the example below, the SC Child and Family Assessment has been selected.

Any forms and letters that have been completed in the workstep will display as hyperlinks under **Documents**. Any documents that have been uploaded and attached to the workstep will appear under **Attachments**.

Within the **Next actions** display, clicking on the ⚙ yellow cog icon will allow you to select **Summary** to view the next Workstep summary or select **Start**/**Resume** to record into the workstep.

The **Previous** workstep also displays as a hyperlink. Clicking on this will open the Workstep Summary screen for the workstep that came before this one.

Requests will display to reflect authorisations, actions and notifications that have been sent from within the workstep.

The menu on the left contains options to return to the **Person summary**, **Family details** or **Carer details** screen or **Work history** which will return the user to the **Work history** screen.