



Children's Services Quick Guide



Viewing and Recording File Locations

File location is used to record where a person's paper file(s) are located. **File location** also allows for temporary and permanent movements of those files to be recorded.

From within the **Person summary** screen, select **File management > File location**. The **File locations** screen displays.

File locations - Miss Violet Parker (8655) born 17 May 2010 (11 years old)

Type	Location	From	To
Childrens Social Care	Lincoln	08/02/2021	 

- **Type** displays the type of file recorded
- **Location** displays where the file is currently stored
- **From** displays the date from which the file has been stored in this location
- **To** displays the end date for when the file was stored in this location
- Clicking  edit icon will display the **Amend file location** screen which will include further information in the **Details** field about the files, such as number of files and box numbers for those stored off site.
- The  move file icon is used to move the file to a new location, such as Off Site Storage or to another team.
- Clicking on **Show History** will display current and historic file locations. Current locations have no end (**To**) date but historic locations do. Any closed/historic files will also have the **To** date recorded.
- Clicking on **Hide History** will hide all historic file locations
- Clicking on **Add** allows a new file location to be recorded
- Clicking on **OK** navigates back to the **Person summary** screen.

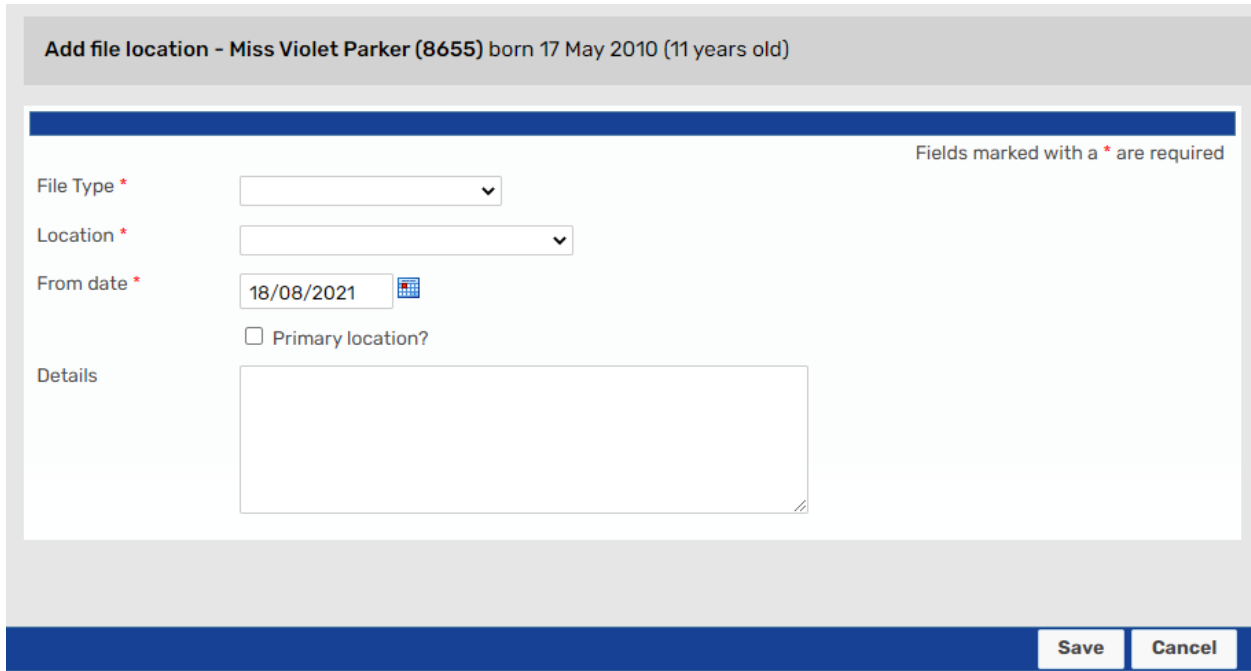
Adding a new File Location

Paper files can be recorded by adding them to the **File location** section.

From within the **Person summary** screen select **File management > File location**.

The **File locations** screen displays.

- Click **Add** (button)
- **Add file location** screen displays.



The screenshot shows a web form titled "Add file location - Miss Violet Parker (8655) born 17 May 2010 (11 years old)". The form contains the following fields:

- File Type ***: A dropdown menu.
- Location ***: A dropdown menu.
- From date ***: A date input field containing "18/08/2021" and a calendar icon.
- Primary location?**: A checkbox.
- Details**: A large text area for entering file details.

At the bottom right of the form, there are "Save" and "Cancel" buttons. A note in the top right corner states "Fields marked with a * are required".

Complete the fields as follows (fields marked with * are mandatory):

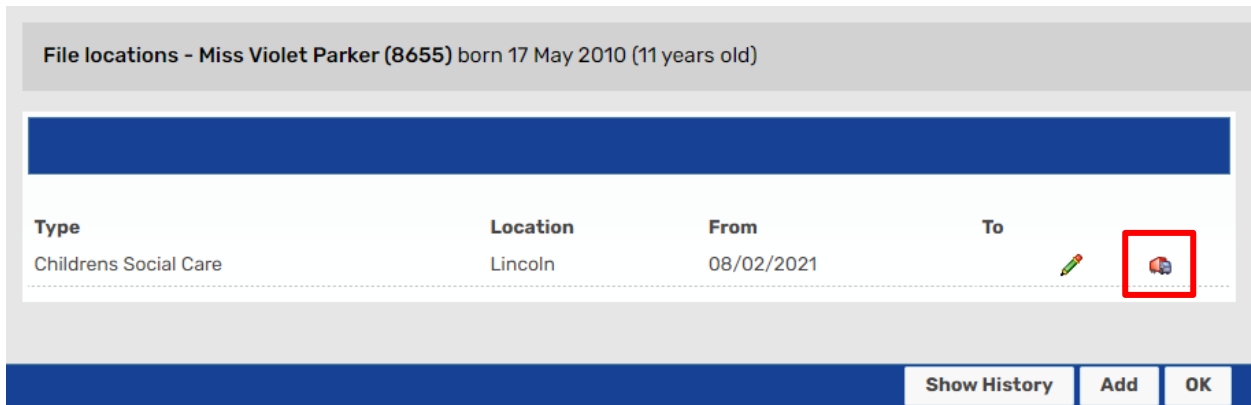
- **File Type*** – Select from dropdown menu as appropriate
- **Location*** – Select from dropdown menu as appropriate
- **From date*** – Enter date manually or by using the calendar icon
- **Primary location?** – Select checkbox if this is where the file will be stored
- **Details** – Enter file details – how many files, what type of files, location details (i.e. which drawer/room or which person has the file), box number if offsite etc.
- Click **Save**



File locations screen re-displays.

Recording a new File Movement

A **File movement** should be recorded if a file moves location – this process is the same for both permanent and temporary file movements.

From within the **Person summary** screen select **File management > File location**. The **File locations** screen displays.



Type	Location	From	To
Childrens Social Care	Lincoln	08/02/2021	 

Buttons: Show History, Add, OK

- Click **Removal Lorry (Move file)** icon 

Move file location screen displays.

Complete the fields as follows (fields marked with * are mandatory):

- **New Location*** – Select from dropdown menu as appropriate
- **From date*** – Enter date manually or by using the calendar icon.
- Click **Save**

File locations screen re-displays with the new file location recorded.

Clicking on **Show History** will display the historic file location.