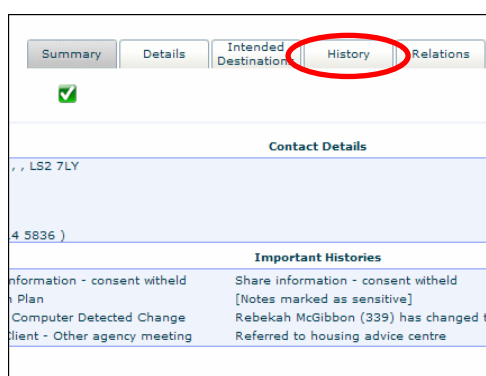


History Summary Page

One of the most useful pages on IO Insight is the [History Summary Page](#). This provides an overview of all client contact, updates and changes. This page has a lot of useful features that enable you to navigate your way around the clients history. These include sorting and filtering the histories, previewing history records and editing records.

Please remember that it is not possible to delete history records – if you have a record that needs deleting, please contact a system administrator.

History Overview



From the client [Summary](#) page, click on the [History Tab](#) (circled left in red) to access the [History Summary Page](#). This will display an overview of all client contact, updates and data changes since the client was created, showing the record with the most recent start date at the top of the page.

Sorting and filtering the histories

The order of the history records can be changed by clicking on the column header. For example, if you wanted to sort the entries by history [Type](#). Then click on the [Type](#) column header (circled right in red).

Thus, the order is changed: all the [Consent](#) histories have been grouped together (circled in green) and all the [Status](#) histories have been grouped together (circled in blue).

The screenshot shows the History Summary page for Test Client Wibbler (DOB: 01/01/2001 (8), Ref: 0051567). The table has columns for Youth Work Interventions, PAYP, Status (circled in red), Individual Circumstances, Connexions Contact, and Safeguarding At Risk. The table is sorted by Type, with Consent entries (circled in green) at the top and Status entries (circled in blue) at the bottom.

Youth Work Interventions	PAYP	Status	Individual Circumstances	Connexions Contact	Safeguarding At Risk
		Type	Category	Start	End
		Level of involvement	Contact	07/07/2009	07/07/2009
		Consent	Share information - consent withheld	01/09/2009	
		Consent	Contact - consent given	27/08/2009	
		Consent	Share information - consent given	12/05/2009	
		Status	Status change	25/11/2009	
		Status	Status change	07/10/2009	
		Status	Verify Status	06/10/2009	
		Status	Verify Status	02/10/2009	
		Status	Status change	05/05/2009	

You can sort the histories by any column header in the history overview page.

Another way to sort histories is by filtering out different history types.

Clicking on the tabs along the top of the [History Summary Page](#) allows you to view only specific history types. For example, clicking on the [Status Tab](#) (circled below in red) will show you only [Status](#) histories.

Test Client Wibbler DOB: 01/01/2001 (8) Ref: 0051567 <input checked="" type="checkbox"/>										
+ Add New History										
Youth Work Interventions	PAYP	Status	Individual Circumstances	Connexions Contact	Safeguarding At Risk	CAF	All Client History	Vacancy Matching (d)	Youth Work Outcomes	JWT
	i	Type	Category	Start	End	Due End	Contact	Organisation		
		Level of involvement	Contact	07/07/2009	07/07/2009		Colin Fenwick		Part Time	
		★ Consent	Share information - consent withheld	01/09/2009			Rebekah McGibbon	IYSS Central Support Team	Part Time	
		Consent	Contact - consent given	27/08/2009			Rebekah McGibbon		Part Time	

You can review a history record from the [History Summary](#) page by clicking on the magnifying glass icon (circled below in red) next to the record you wish to view.

+ Add New History			
Youth Work Interventions	PAYP	Status	Individual Circumstances
	i	Type	Category
		Status	Status change
		Status	Status change

This will bring up a preview window, where you can view all the information in that record. Click the to exit the preview window.

You cannot edit a record in the preview window.

Another way of previewing a record is by hovering your cursor still over the [Notes](#) column. A small pale yellow preview box will appear, which enables you to read the record [Notes](#) in full, without entering the history record. This is particularly useful if you are trying to quickly locate a record.

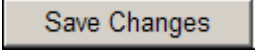
+ Add New History			
Youth Work Interventions	PAYP	Status	Individual Circumstances
	i	Type	Category
		Status	Status change
		Status	Status change

Editing a history record

You can edit a history record previously entered. This can be done by clicking on the pen and paper icon (circled left in red) next to the history you wish

to change.

This will open the history, where you can edit any of the fields of the record.

Once the changes have been made, click the  button at the bottom of the screen.

Please do not edit a record that does not belong to you. If you believe the information in a record not entered by yourself to be incorrect, please contact the PA responsible.

Click the [Return To History Summary](#) button at the top left hand corner of the page to return to the history overview.

Please remember: Deleting a history record is not possible. If you need a record deleting, please contact a system administrator.