Recording Personal Notes

What are Personal Notes?

The concept of Personal Notes originated from the Aspire system which staff from Prospects had used before moving to using Insight at the point of IAG Transition in April 2009. The Personal Notes were intended as a section where information of a more sensitive nature could be recorded for all staff to see but not be on immediate display along with all the other interaction records.

Following discussions at the IYSS Insight User Group, it was decided to create a new History Type and Category for Personal Notes and to migrate any existing notes into this new History Type. This meant that the information was close to other History records that might reference those notes. It also meant that users would not have to navigate away from the History Summary Screen in order to read those notes.

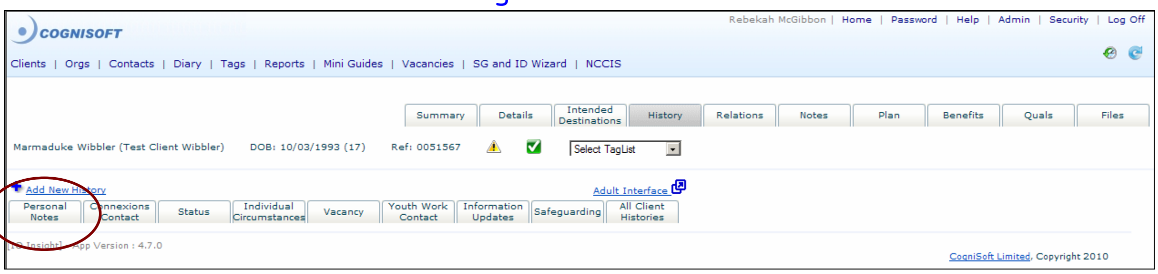
When might you use the Personal Notes History?

Insight already has the capability to completely lock very sensitive notes down so that they can only be accessed by the person that created them. This is intended to be for information that really should only be shared if absolutely necessary. The idea of the Personal Notes is to record sensitive information that you think should be widely available to other PA's but should not necessarily be immediately viewable by anyone opening the record. This can be of particular use if you are used to having the client with you whilst you are accessing their Insight record. Personal Notes can, for example, be used to provide extra detail about a Special Alert that has been recorded.

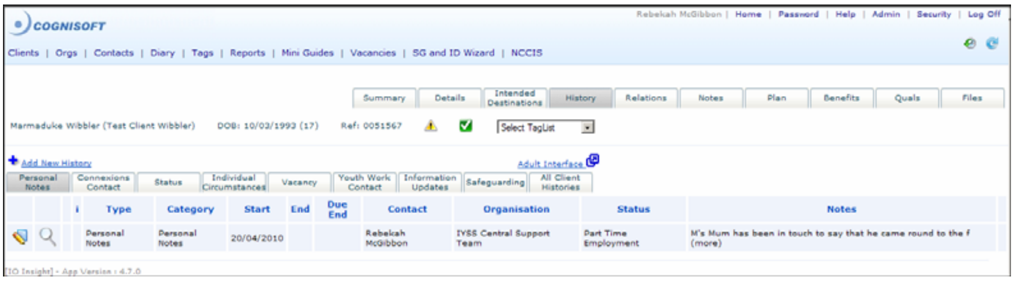
It is worth remembering, however, that what is recorded in these Personal Notes still needs to adhere to the principles of the Data Protection Act. It needs to be factual, accurate as well as adequate, relevant and not excessive for our purpose.

Where can you view the Personal Notes?

Personal Notes are a Type of History record and so they can be found on the History Summary Page by clicking on the Personal Notes tab as circled below. This filters them out from all the other different History records.



If there are any Personal Notes recorded for the client, they will be displayed (as shown below) once you have clicked on the Personal Notes filter.



Viewing Personal Notes

Personal Notes can be viewed in the same way as other Histories – the easiest way being to overview the record using the magnifying glass icon.

This will open up a new window on your screen that shows the details of the record, including the notes, the date it was recorded and who it was recorded by.

To close the overview, click on the red X at the top of the pop up box (as circled above).

Editing Personal Notes

Like other History records, Personal Notes can be edited by clicking on the Edit icon next to the record.

This will then fully open up the record for editing, as shown on the left.

When you have finished editing the record, remember to click Save. You will know if your update has been logged as you will get the message Record Updated Successfully.

Recording a new Personal Notes History

From the History Summary Page, click on the Add New History link.

This will open up a brand new History page. You will now need to select the Personal Notes Type from the drop down menu.