

How to record a meeting or contact activity on lizuka.

After you have logged in to the client the Case Details page will open.

Available Actions

Description	Owner	Type	Actions
Record a Meeting Feedback form and / or Pathway Assessment	Me	2. Pathway Assessment	Add
Pathway Action	Me	3. Completed Pathway Action	Add
Internal Change Action	Me	4. Completed Internal Change Action	Add
Risk Assessment Communications Action	Me	5. Add a Risk Assessment Communications Action	Add
Contact / Activity Log	Me	6. Add a Contact or Activity Log	Add
Record a Meeting Form	Me	Record a Meeting Form	Add

On the right hand side of the page there is this box.

I think the best way to record any activity or meeting is to use the Contact / Activity log.

Click here to open this.

Add Action

6. Add a Contact or Activity Log

Action Details

Date
Summary

Contact and Activity Log

Type of Activity

Other, please specify

Who carried out with activity

Contact Method

Time Spent on activity (in minutes)

Subject

Notes

Are there attached documents via the notes section?

Attachment

This is the box that will open.

1. The date, by default this will be the present date and time, but if you click on it you can change it to the date when the activity occurred.
2. The summary box is a new feature, this is really useful since it gives an indication about what the contact is about on the lizuka client page
3. Type of activity, if nothing on this matches what you are trying to record select Other and then in the space below enter what it was.
4. Who you carried out with activity, you do not need to put anything in here, I only enter anything if there is a third party (not me or the client) involved.
5. Contact method just pick what's appropriate from the drop down list.
6. Time spent in minutes even if over an hour, just enter numbers (no text or spaces); PLEASE ENTER THIS approximate figures are ok. This is useful when I am writing reports to show how much time and efforts all you mentors put into the work.

7. Subject & Notes are self evident; if you left click and drag the bottom right hand corner you can increase the box size.

8. Only tick the attached documents box if you are adding an attachment.

Don't forget to click the OK button to save your entry.