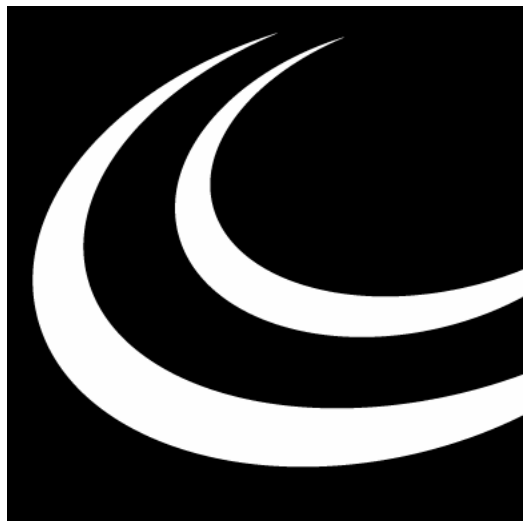


# Systems Support

## Swift Training



### Assessments and Reviews

January 09

Northumbria Healthcare 

NHS Foundation Trust

*In partnership with*

**NORTHUMBERLAND**  
COUNTY COUNCIL



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# ACCESSING ASSESSMENTS AND REVIEWS



- Access via Launch Pad or by using navigate. Refer to the *Basic Use of Swift* manual.

The following screen will be displayed:


- If you have accessed Assessments and Reviews via Launch Pad you will need to find the client. Refer to the *Frontdesk manual - Finding a Person* section of this manual for guidance.

## ASSESSMENTS

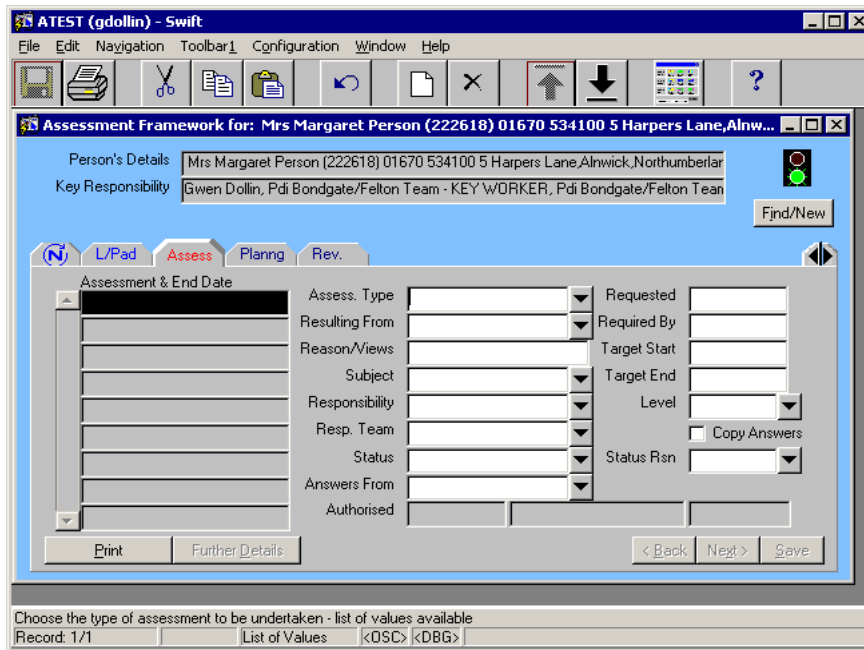
### Viewing Assessments


- Click on **Assess**
- A person may have several assessments entered on Swift and on accessing the assessment screen you will see a list of all assessments entered in the Assessment & End Date summary list. The assessments will be displayed in datal order, with the most current assessment being at the top of the list.
- Click on an assessment listed in the Assessment & End Date summary list and the assessment detail will appear on the right of the screen.
- To view an assessment which does not display in the Assessment & End Date summary list, use the scroll bar to the left of this field to move down the list.

## Recording an Assessment

- Click on 

The following screen will be displayed:



- Press  to create a new assessment.
- Complete the following fields:

**Assess. Type**

Enter the relevant assessment type, e.g. **Care Management Assessment**.

**Resulting From**

Enter the latest referral.

**Target Start**

Enter the date the assessment started.


*Note: this should be the same date as given in Resulting From field.*

**Subject**

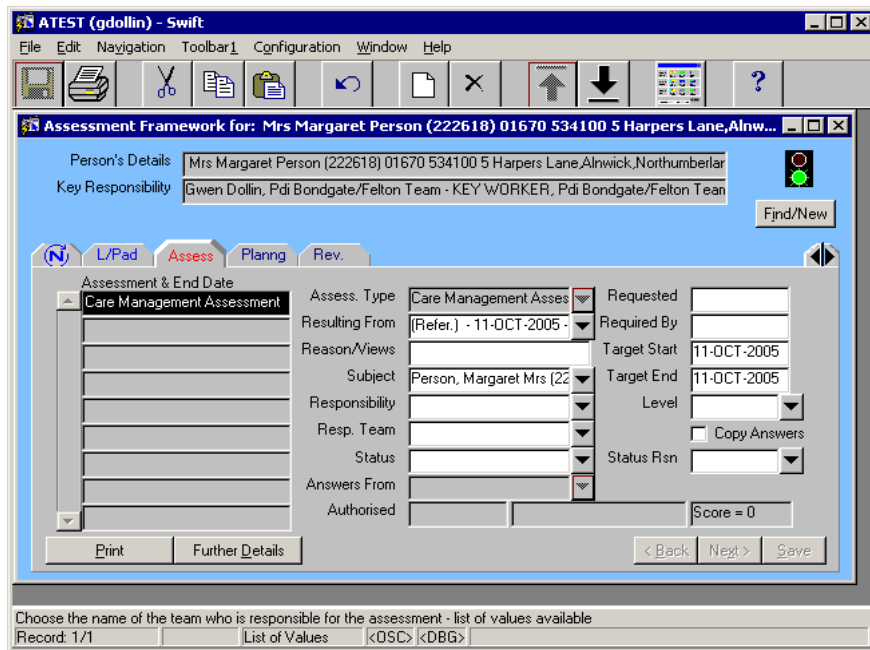
Automatically completed with the name of the client you are recording the assessment against.

**Target End**

Enter the date the assessment ended.

- Click on 


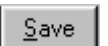
The following screen will be displayed:



After an assessment has been carried out, if the client is to remain allocated to a key worker then a scheduled review must be set up. Refer to Reviews section of this manual.

## Ending An Assessment




If an expected end date was entered in the target end date field when the assessment was input and the assessment has now ended you will need to go and correct the target end date with the actual date the assessment ended.

- Click on .
- Click on the assessment that needs to be ended. Be careful to click on the correct one to ensure that you do not end the wrong assessment.
- Enter the date the assessment ended in the Target End Date field.
- Click on .

*Note:* after an assessment has been carried out, if the client is to remain allocated to a key worker then a scheduled review must be set up. Refer to Reviews section of this manual.




## Amending an Assessment

When recording an assessment if an error is made when inputting assessment type, the type cannot be amended. If you have entered the incorrect assessment type you will need to delete the assessment and re-input it. Refer to *Assessments and Reviews – Assessments - Deleting an Assessment* section of this manual for instruction. Errors made with any other assessment details can be amended;

- Click on .
- Click on the assessment that needs to be amended. Be careful to click on the correct one to ensure that you do not amend the wrong assessment.
- Tab to the field you wish to change and either overwrite the existing information or, where there is a drop down box, click on the drop down box, select the correct item on the list and click on .
- Click on .

## Deleting an Assessment

This option is only to be used where an assessment has been entered in error or where an incorrect assessment type has been used.

- Click on .
- Click on the assessment that needs to be deleted. Be careful to click on the correct one to ensure that you do not delete the wrong assessment.
- Click  (Delete) on the toolbar and the assessment will be removed.
- Click on .



## REVIEWS

- Click on 

The following screen will be displayed:

## Viewing Reviews

A client may have several reviews entered on Swift and on accessing the reviews screen you will see a list of all reviews entered in the Review Due Date & Type summary list. The reviews will be displayed in datal order, with the most current review at the top of the list.

- Click on a review listed in the Review Due Date & Type summary list and the review detail will appear on the right of the screen.
- To view a review which does not display in the Review Due Date & Type summary list, use the scroll bar on the left to move down the list.

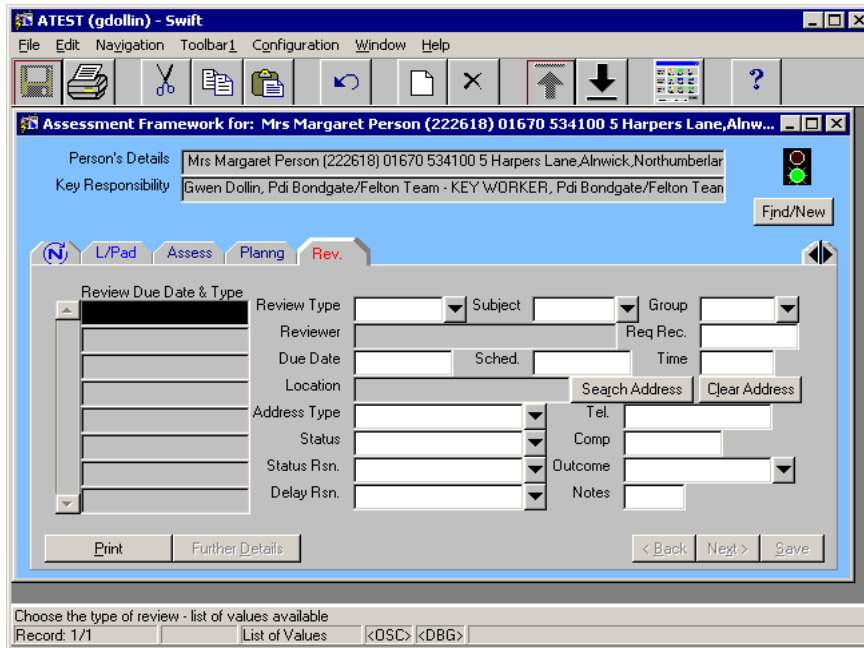
## Recording Reviews


### Recording a Scheduled Review

After an assessment has been carried out, if the client is to remain allocated to a key worker then a future review must be set up. When setting up a future review, Swift will automatically remind the key worker that there is a review due and this will appear as a workflow job in the key worker's Workflow Intray.

- Click on 

The following screen will be displayed:



- Press  to create a new review.
- Complete the following fields:

#### Review Type

Enter the review type, e.g. **CM Review**.

#### Subject

Automatically completes with the name of the client you are recording the review for.

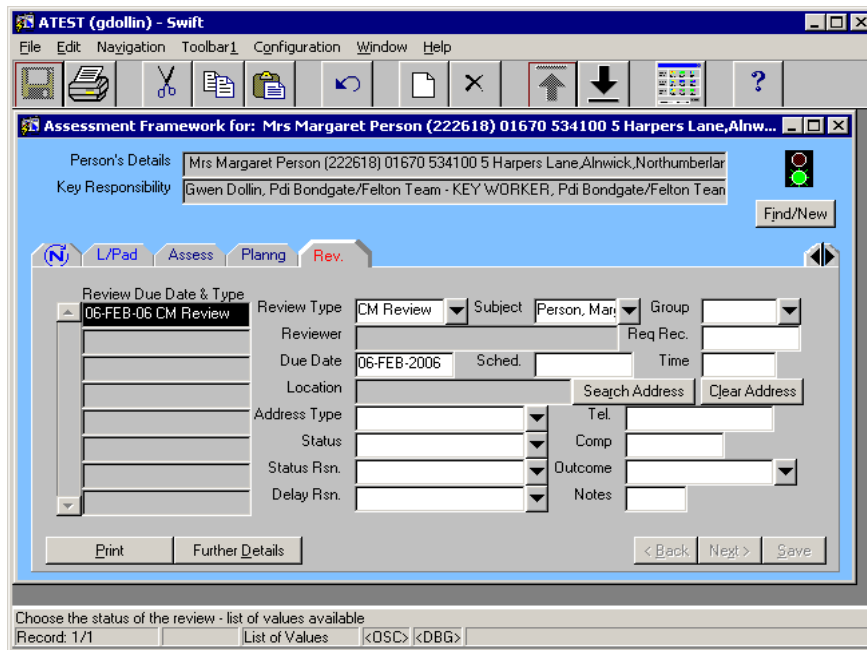
#### Due Date

Enter the date the review is due.

- Click on 

The review is now set up and the workflow job "Review" will automatically appear for the key worker four weeks before the review due date.

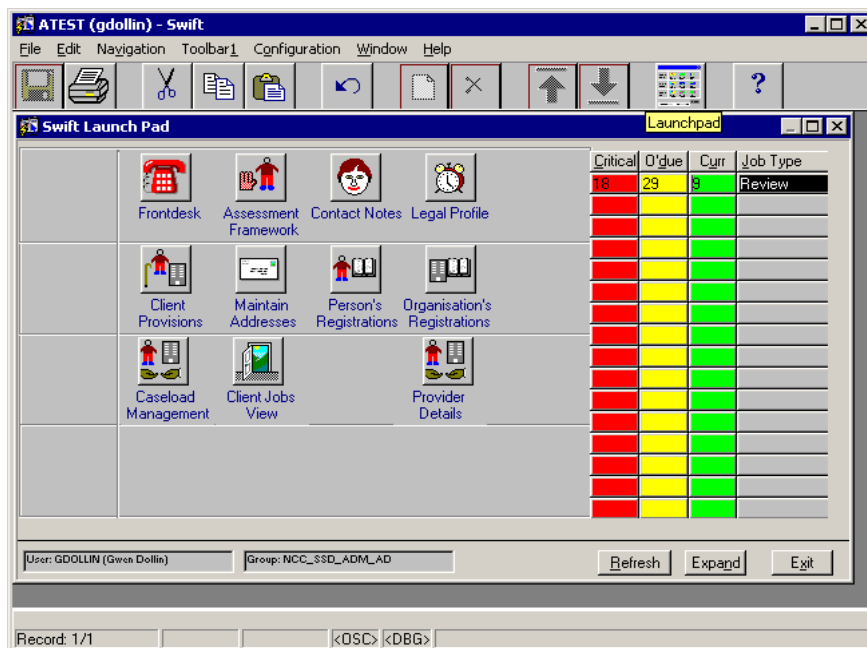
The following screen will be displayed:



## Recording that a Scheduled Review has been Completed

One month before a Review is due to be carried out for a client, if you are the key worker, you will automatically receive a workflow job on your Workflow In Tray entitled "Review".

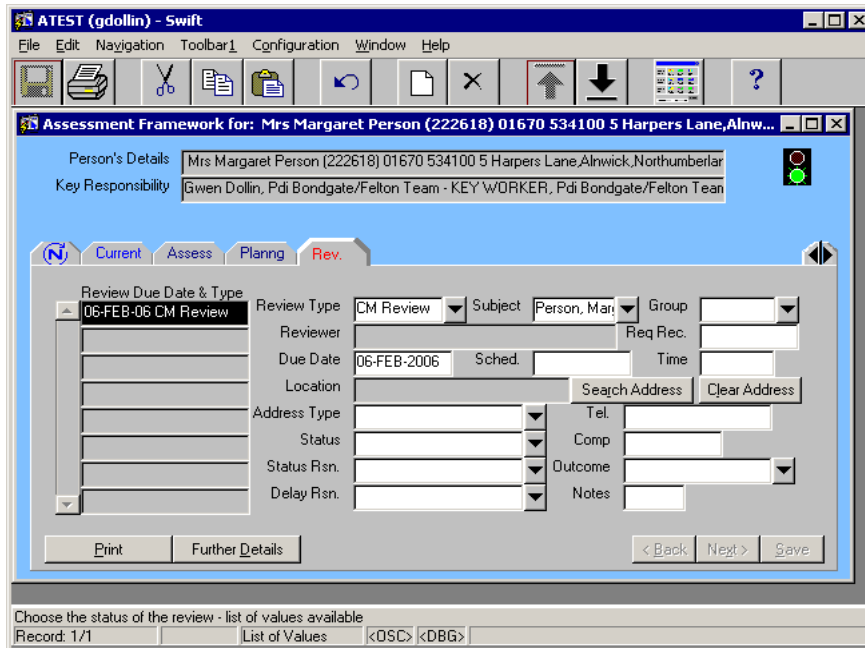
The following screen will be displayed:



This job is to notify you, as the key worker of the client, that a review is due to be carried out.

- To view further details and Work On the "Review" jobs that are displayed on your in tray, click on the job type "Review" and access the review to be completed Please refer to the *Workflow Manual – Accessing Workflow Screens - Actioning / Working on a Job* section of this manual.

The following screen will be displayed:



You should always access reviews that are due via Workflow to ensure Workflow is kept up to date and accurate.

- The review you have carried out will be entered in the Review Due Date & Type summary list on the left hand side of the screen. Click on the review to display the details on the right side of the screen.

- Complete the following fields:

**Comp**


Enter the date the review was completed.

**Outcome**

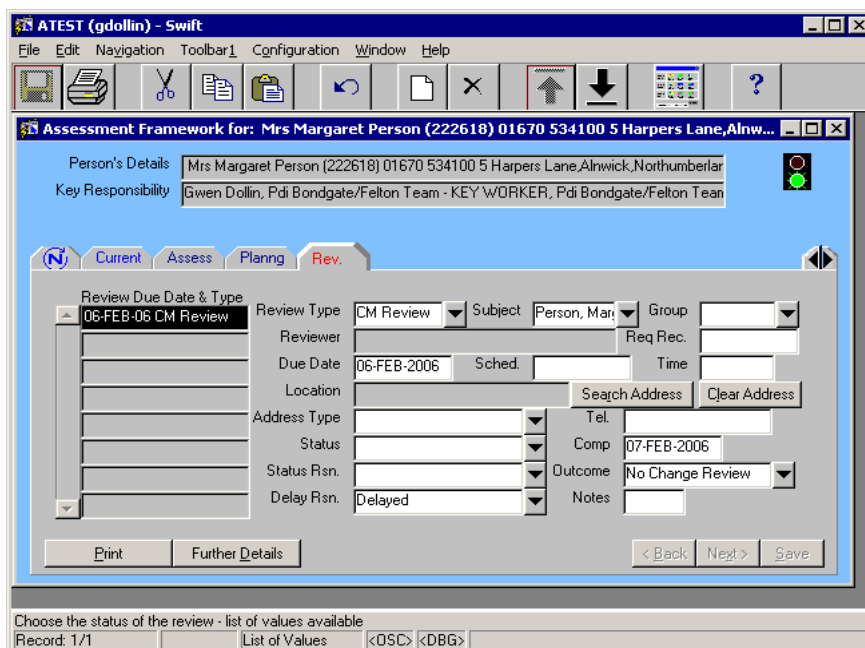
Enter appropriate outcome, e.g. **No Change Review**

**Delay Reas**

Enter **Delayed** if the Comp date is later than the Due Date.

- Click on 

The following screen will be displayed:




Note: the Review workflow job will have disappeared from your workflow intray


## Setting a Next Scheduled Review

After a review has been carried out, if the client is to remain allocated to a key worker a next scheduled review must be set up. This is so that Swift will automatically remind the key worker that there is a review due and this will appear as a workflow job in the key worker's Workflow In-Tray. Refer to *Assessments and Reviews – Reviews – Recording Reviews - Recording a Scheduled Review* section of this manual.



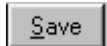
## Changing the Date of a Scheduled Review

If a client's circumstances change you may wish to alter the date the scheduled review is due. Altering the date of the scheduled review will automatically update the date of the workflow job.

- Click on 
- Click on the Review that you want to changed. Be careful to click on the correct one to ensure that you do not change the wrong review.
- Complete the following field:
 



**Due Date**  
Overtyping the existing date with the new date of the scheduled review.
- Click on 

## Amending a Review

- Click on 
- Click on the Review that you want to amend. Be careful to click on the correct one to ensure that you do not amend the wrong review.
- Tab to the field you wish to change and either overtype the existing information or, where there is a drop down box, click on the drop down box, select the correct item on the list and click on .
- Click on 

## Deleting a Review

If the client's circumstances change and the review is no longer to be carried out it can be deleted from Swift. This will automatically remove the workflow job from the key worker's workflow in tray.

- Click on 
- Click on the Review that you want to delete. Be careful to click on the correct one to ensure that you do not delete the wrong review.
- Click  (Delete) on the toolbar and the review will be removed.
- Click on 