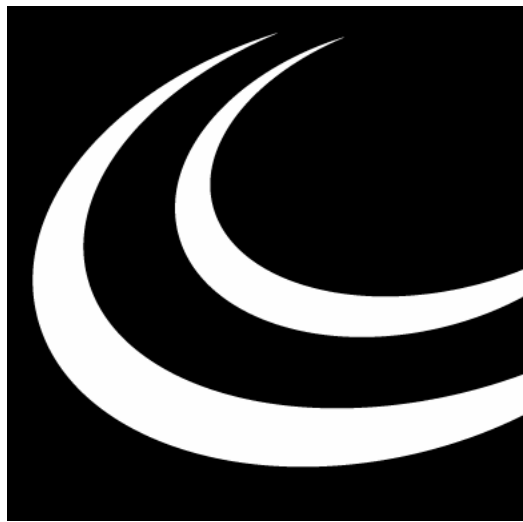


Systems Support

Swift Training



Costed Packages of Care

Dec 14

Northumbria Healthcare 

NHS Foundation Trust

*In partnership
with*

NORTHUMBERLAND
COUNTY COUNCIL

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COSTED PACKAGES OF CARE

The Costed Packages of Care (CPC) module is used to record all services provided to a client, for example; home care, day care, residential and nursing care, short break care, etc.

Note: before any services can be input against the client they must exist on Swift with an open referral, and a key worker and key team on the involvements screen in the Frontdesk module.

Accessing the Costed Packages of Care Module



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

The following screen will be displayed:

The screenshot shows the 'Client Provisions' window in the Swift software. At the top, there are input fields for 'Client' and 'Worker', and a 'Find/New' button. Below this is a 'Start Date & Provision' table with multiple rows. To the right of the table is a form with various fields: 'Provision' (dropdown), 'Provider' (dropdown), 'Contract' (dropdown), 'Planned Start' and 'Planned End' (date pickers), 'Actual Start' and 'Actual End' (date pickers), 'End Reason' (dropdown), 'Authorised Date' (text), 'Statute' (dropdown), 'Joint' (dropdown), 'Carer Service' (checkbox), 'Payment Type' (radio buttons for Gross and Net), and 'Placement' (radio buttons for Short, Long, N/A, and SA). There are also checkboxes for 'Send for Auth' and 'Send to Service'. At the bottom of the form are buttons for 'Print', 'Further Details', '< Back', 'Next >', and 'Save'.

- If you have accessed CPC via Launch Pad you will need to find the client. Refer to *Frontdesk* manual - *Finding a Person*.

Costed Packages of Care (CPC)

Provisions Screen	
Provider	Provision
Helping Hands <i>(Home Care)</i>	15 MIN RATE MON – SUN -Home Care-Adult
Amble Day Centre <i>(Day Care)</i>	SESSIONAL DAY CENTRE - NCC [DC01]-Day Care-Adult
Dolphin View <i>(Nursing Care)</i>	BANDED NUR - Nursing-Adult
Holmside <i>(Residential Care)</i>	BANDED RES DE-Residential-Adult

T
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Schedule Screen
Home Care Day Care Enabling

Non Schedule Screen
Residential Care Nursing Care Short Break Care One Off Payments

F
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R
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E
R

D
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T
A
I
L
S

Breakdown Screen
Records the breakdown of the service by day of the week and times or units

F
U
R
T
H
E
R

D
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T
A
I
L
S

TYPES OF SERVICES

Services in Swift are either scheduled or non scheduled services.

Scheduled Services

A scheduled service is one that can happen some days but not others, e.g. 2 hours of home care 3 days per week. Scheduled services include home care, day care and enabling services. A client may receive home care every day of the week but it is still a scheduled service because it is possible that home care may happen some days and not others. To enter a scheduled service on Swift refer to *Costed Packages of Care – Recording a Scheduled Service* section of this manual.

Non Scheduled Services

Non scheduled services are either continuous or one off. Non scheduled services include one off payments, residential/nursing care and short break care.

To enter a non scheduled service on Swift refer to *Costed Packages of Care – Recording a Non Scheduled Service* section of this manual.

Alternative Costs

Where a service doesn't have a standard cost, an alternative cost will need to be entered manually onto Swift. The cost must be calculated as the full weekly cost (unless it is a one off cost, in which case the actual cost should be entered as the alternative cost).

To record a service with an alternative cost refer to *Costed Packages of Care – Recording a Non Scheduled Service* section of this manual.

Cyclical Services

Cyclical services are services that may happen some weeks but not others. For example, a service may be provided every fortnight or it may be provided every week in three. Cyclical services can be recorded in two possible ways, either by using the standard of every 2 weeks, or every 4 weeks, or by using a provision set up specially with the appropriate costs in order to reflect the cost of an irregular service, i.e. a cyclical service that is not every 2 weeks or every 4 weeks.

To record a cyclical service refer to *Costed Packages of Care – Recording a Cyclical Service* section of this manual.

ADDITIONAL INFORMATION

Spot Contracts

Spot Contracts are services the care manager and Contracts Section negotiate with the provider. They can be scheduled or non scheduled services depending upon what service is being purchased.

Contracts Section admin enter all the Spot Contract provisions onto Swift, using provision names which usually begin with the "SP". **Team based admin should not input any of these types of provisions.**

The process of arranging spot contracts can be quite time consuming therefore in order to have the costs reflected on Swift quickly, spots are entered before all of the relevant paperwork is signed. You may notice the word "Provisional" in the Notes field on the Schedule or Non Schedule screen. Once all the paperwork has been signed Contracts Section will remove Provisional from the notes field and send the provision for authorisation.

All spot contract provisions are initially input onto Swift by the Contracts Section, but are subsequently maintained by team based admin. Refer to *Costed Packages of Care – Review of Services or Changes to Services Between Reviews – Change to Service Provision* section of this manual.

Team based admin will still be responsible for updating reviews, closing any provisions that may be ending, and changing the clients address if they are going into permanent care.

Direct Payments/Specific Payments/Independent Personal Budgets

Direct Payments/specific payments are another way a client can use their personal budget. It is where a personal budget is paid to the person (or a third party) to be used to pay for specific agreed services, to give the person more day to day control over how they are delivered (e.g. to enable them to book directly with a care home for short breaks).

Independent Personal Budgets are where the personal budget is paid to the person (or to a third party who they ask to administer it for them), and used in whatever way they choose to meet the outcomes identified during assessment

All direct payments provisions are input onto Swift and subsequently maintained by the Direct Payments admin. **Team based admin should not input any of these types of provisions.**

Continuing Care (CHC)

This is a term which describes the entitlement to health care that clients may need as a result of disability, accident or illness. It can also describe the care clients might need at the end of their life. NHS continuing health care funding provides additional or specialist health care services which are not provided by mainstream services and is commissioned by the primary care organisation from a range of providers.

Continuing health care can be fully funded by the NHS or provided as part of a jointly funded package of care with Social Care (Shared Care), where health and social care needs are intertwined. Eligibility for continuing health care is established by the application of a set of eligibility criteria.

NHS Funded provisions are recorded against social care cost centres.

Where a provision is shared care, the client will have the Social Care provision recorded on Swift with the Joint Funded field completed on the provisions screen. Within further details of either the no schedule or schedule screen the Acc Code screen will be completed with the shared care costs agreed at the CHC panel for Social Care and NHS Funded as percentages which must add up to 100%. For guidance on how to view Shared Care provisions please refer to *Crib Sheet - Viewing Shared Care Provisions*.

Funded Nursing Care (FNC)

Clients placed in nursing homes are entitled to financial help from the NHS. This help is towards the cost of their medical care and each client is assessed to establish the level of medical nursing care needed, and therefore the level of financial help they are entitled to. The assessment is carried out by a member of the Nurse Assessment Team (NAT).

Once panel approval has been received, it is recorded in CPC by Team admin using a provision named SINGLE BAND FNC (NCT).

Bebside Unit

There is an agreement with Bebside Unit for the maximum number of nights per year that a client can receive, and vouchers for those nights are issued. This service is recorded by team based admin using the Non Schedule screen. Refer to *Costed Packages of Care – Recording a Non Scheduled Service* section of this manual and the following should be noted:-

The Provider should be Bebside Unit, the Provision should be RESPITE VOUCHER SCHEME. On the Non Schedule screen enter a description of Short Break, enter the same start and end dates, a frequency of One Off and the number of nights per year should be entered in the Units field.

In addition to this, the Finance Section will be recording another provision called BEBSIDE ACTUAL STAY FINANCE USE ONLY, to show the actual dates of the stay, but this will have no impact on team based admin.

You may be contacted by a member of the Finance Section if the number of nights per year recorded against the RESPITE VOUCHER SCHEME does not agree with the number that have been approved.

Client Contributions/Charges

Clients receiving costed services are assessed, by Finance, to identify the amount they may need to contribute towards their care. When any new provisions are input or changes to existing provisions this may generate a workflow job to a member of Finance as it may impact on client contribution/charges.

Client Withdraws From a Service Because of Charges

If a client wants to end the service they are receiving because of the charges identified in their financial assessment, you must end the service on the Provision screen in Swift and record the end reason of "Withdrawn because of charges". Refer to *Costed Packages of Care – Ending Services – Ending Services on the Provisions Screen* section of this manual.

If the client cancels a planned period of short break care (due to the charges) that has already been entered on Swift, but does intend to continue with others, you will need to end the cancelled short break on the same date as the start date on the Non Schedule screen, change the number of units to zero and enter the word "charges" in the notes field.

If the client cancels the short break care for any other reason you can contact the System Support Help Line who will delete the period of care for you. Refer to *Costed Packages of Care – Deleting a Service* section of this manual.

Transferring Cases

When a case transfers from one team to another the **receiving team** must carry out changes to Swift in CPC.

Note: for additional information on transferring cases refer to the Frontdesk manual – Transferring a Case.

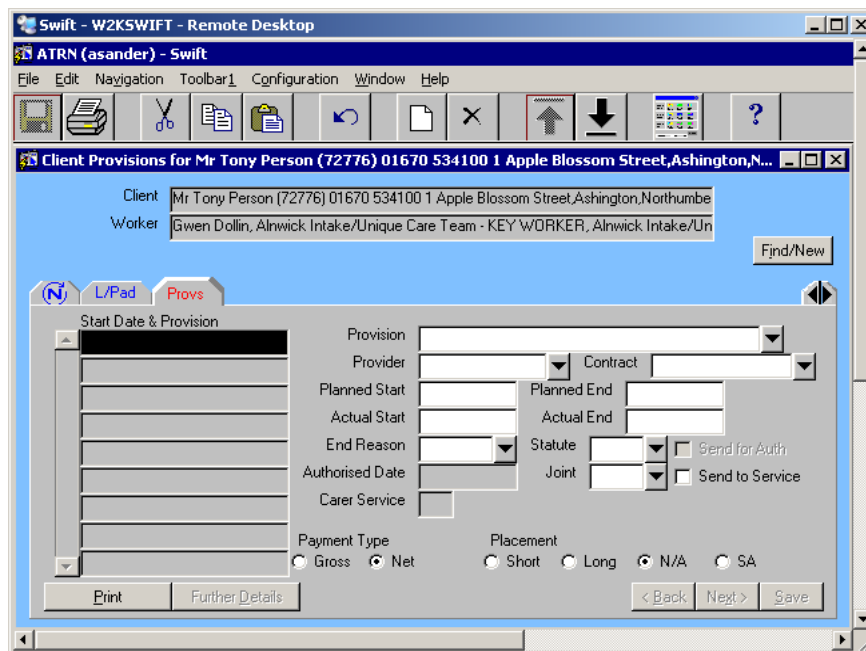
If the client is receiving costed services, the cost centre must be changed to that of the new team.

For each ongoing service in CPC you must:-

- Record an end date of the day before the transfer on the Schedule/Non Schedule screen, to end the costs for the **transferring team's** cost centre.
- Record a new scheduled/non scheduled service, with the new **receiving team's** cost centre, starting on the day of the transfer.
- You will need to send any new schedules/non schedules recorded for authorisation.

Refer to *Costed Packages of Care - Review of Services or Changes to Services between Reviews* section of this manual.

ABOUT THE PROVISIONS SCREEN



Provider

This field allows you to select who the service provider is, e.g. Helping Hands, Amble Day Centre, Dolphin View Residential Home.

Note: even though this is the second field on the screen, you must select from this field first of all.

Providers are accessed via the drop down list. By choosing the provider first this will restrict the list of provisions (the first field) to only those offered by the selected provider. Refer to *Costed Packages of Care – About the Provisions Screen – Searching for a Provider* section of this manual.

Provision

A provision is the service provided by the provider, e.g. 15 Min Standard Rate, Bathing Service. It is from the provision that the costs for the service are driven.

Provisions are accessed via the drop down list. Due to the large number of provisions set up in Swift it will be easier to find the provision if the provider is selected first.

Actual Start

The date the service starts or is agreed.

Actual End

The end date is only completed when the service is no longer to be provided to the client.

Searching for a Provider

There is a quick way of searching for the provider:

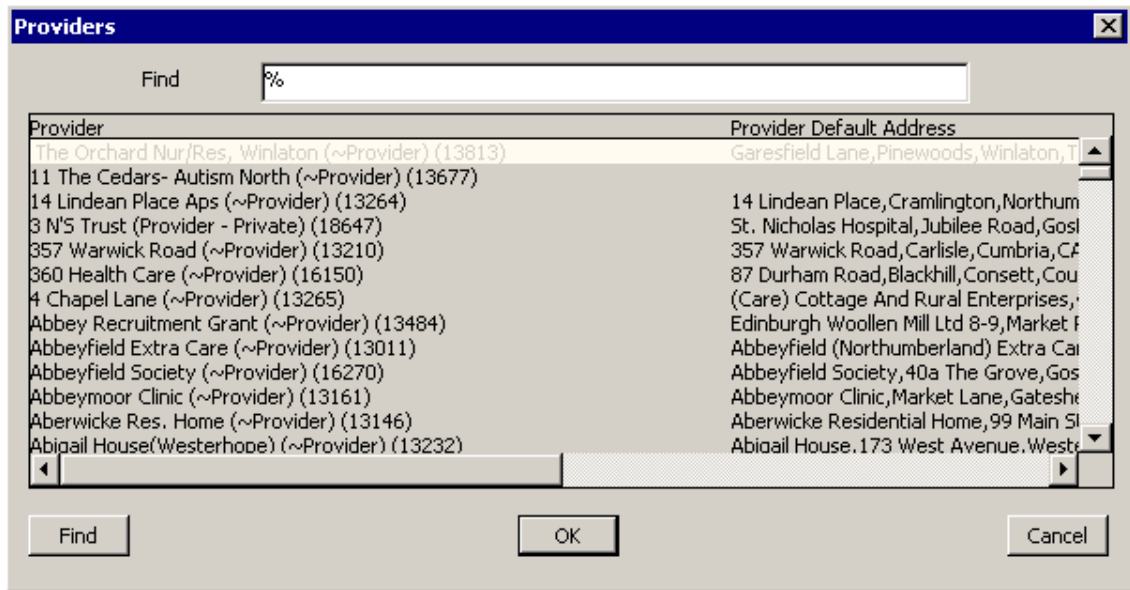
- Tab to the Provider field.
- Enter the first few letters of the name of the provider, e.g. Home Care.
- Press the tab key.

Either the name of the provider will automatically appear in the field or a selection will appear.

If you fail to find the provider you want using this method then you can use the search facility on the display list:




- Click on the drop down box to display the list of providers.

The following screen will be displayed:



If Swift doesn't find any matches this screen will automatically display.

The list of providers is very long as it contains the names of all providers and, although it is possible to scroll down the list, the Find option, appearing at the top of the screen, will enable you to quickly find the provider you want.

- Enter as much text as necessary to find the provider. The wild card can be used for any part of the name you are unsure of, e.g. %Abbey%.
- Click on .
- When the provider is found, click on the provider to select it and click on . If there is more than one provider displayed, click on the one that you want, then click on .

The provider's name will appear in the Provider field.

Note: if you can't find the provider you are looking for please contact the Systems Support Help Line on 01670 622450.

RECORDING A SCHEDULED SERVICE

Scheduled services fall into 2 groups: those that are recorded in units such as day care, meals on wheels, and overnight home care; and those that are recorded by entering the start and finish times such as daily home care.

Scheduled Services Recorded in Units

This section covers day care, meals on wheels, overnight home care (but not daily home care) and other services that are handled in units rather than times. The example used on the screen prints that follow is for day care but any service where the units are entered will be handled in the same way.

Completing the Provisions Screen

- Click on **Provs** (Provisions).
- You will need to check that the service isn't already recorded. If it is then you need to refer to *Costed Packages of Care – Review of Services or Changes to Services Between Reviews* section of this manual.
- If other provisions are already recorded press **F6** to obtain a new line in the Summary List.
- Complete the following fields:

Provider

Enter the provider of the service first (even though this is the second field on the screen). Refer to *Costed Packages of Care – About The Provisions Screen* section of this manual for further instructions if necessary.

Provision

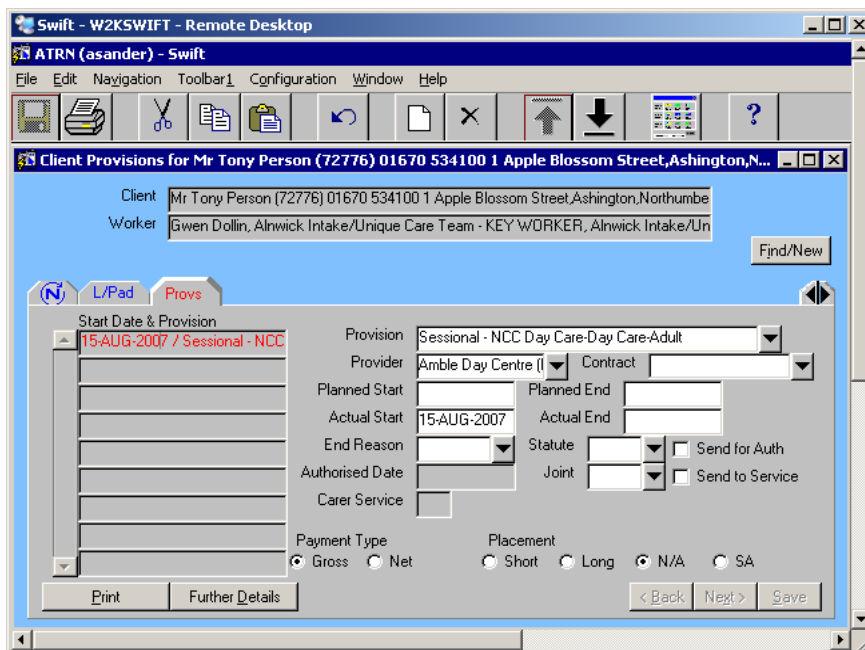
Enter the provision being provided to the client.

Actual Start

Enter the date the service starts or is agreed.

- Click on **Save**.


The following screen will be displayed:



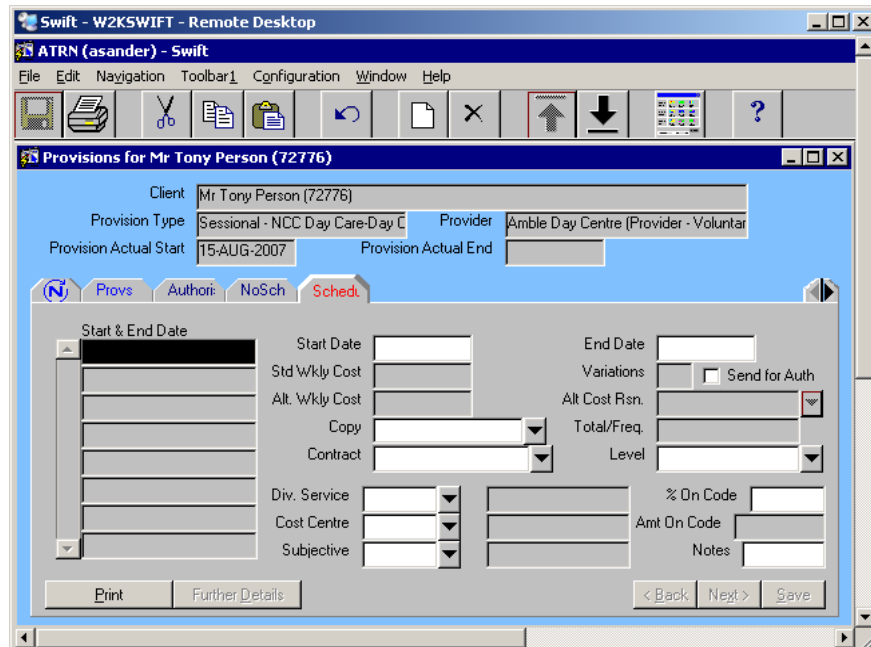
Completing the Schedule Screen

- Click on 

Note: notice that the provision and provider appears in the header at the top of the screen.

- As you are entering a scheduled service you need to click on  (Schedule).

The following screen will be displayed:



- Complete the following fields:

Start Date

Enter the start date of the service.

End Date

Enter the end date if the service has already taken place and the end date has passed, otherwise leave this field blank.

Div. Service

This field is completed automatically.

Cost Centre

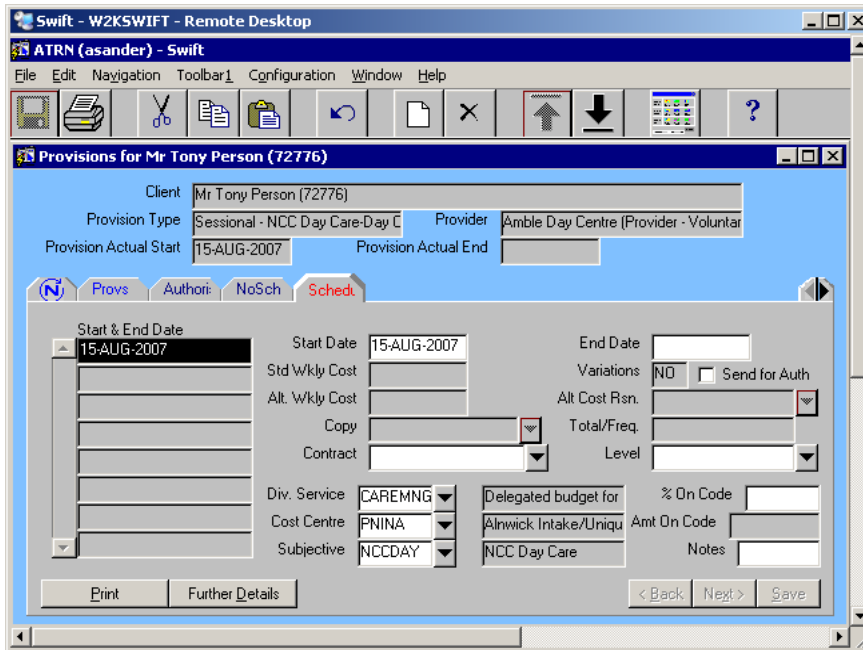
This field is completed automatically with the cost centre of the Key Team.

Subjective

This field is completed automatically.

- Click on .

The following screen will be displayed:

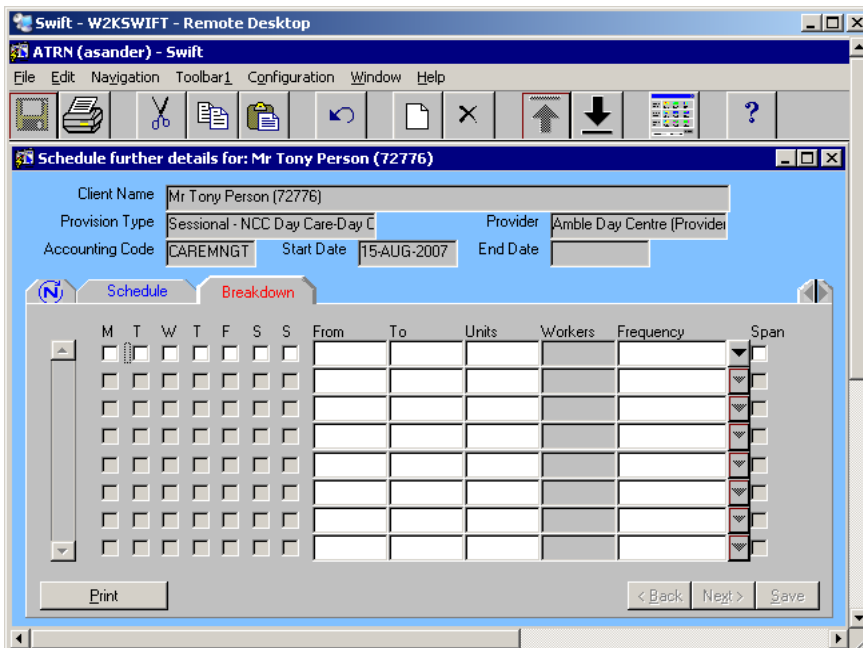


At this stage, there are no costs displayed on the Schedule screen. The costs will be calculated from the breakdown of the service at the next level.

Completing the Breakdown Screen

- Click on **Further Details**

The following screen will be displayed:



- To enter the details into the breakdown screen complete the following fields:

M - S

Click into the appropriate box for each day of the week that the client receives the service.

Units

Enter the number of units in a day for day care; the number of meals per day for meals on wheels.

Note: some day care is sessional; some day care is daily. All day care provisions have been clearly labelled to indicate whether the unit of measure is daily or sessional.

If a client is attending a day centre for a full day and the day care is sessional then the units will be 2. If the client is attending for a full day and the day care is daily then the units will be 1.

Meals on wheels should always be 1 as a client would not receive more than one meal per day.

Examples	<p>If the client attends a day centre 3 full days a week and the day care is sessional you would enter a tick against each day of the week and the units will be 2.</p> <p>If the client attends a day centre 3 mornings a week and the day care is sessional you would enter a tick against each day of the week and the units will be 1.</p> <p>If the day care is sessional and the client attends a day centre for mixed whole days and half days, e.g. full days Monday and Thursday but half days Wednesday and Friday, then treat the full days and half days as separate lines within the weekly grid. Enter a tick against the relevant day of the week on each line and enter 2 units for the full day line and 1 unit for the half day line.</p> <p>If the client attends a day centre 3 full days a week, and the day care is daily you would enter a tick against each day of the week and the units will be 1.</p> <p>The unit for meals on wheels will still be 1 even if the client is supplied with a meal every day of the week. (You would enter a tick against each day of the week).</p>
-----------------	---

Workers

This field is used to indicate how many workers are needed to provide the service. When there is only 1 worker, this field is left blank.

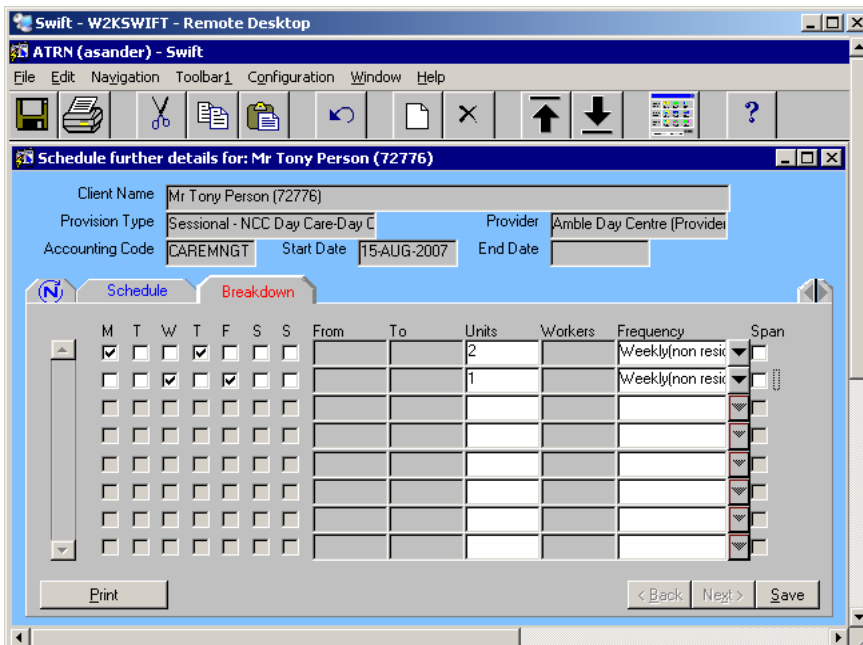
Frequency

Click on the frequency that best relates to how often this breakdown is to be provided, e.g. Weekly, Fortnightly or Four Weekly.

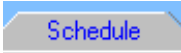
In most cases it will be weekly. For instruction on how to insert a cyclical service on a schedule refer to *Costed Packages of Care – Recording a Cyclical Service* section of this manual.

- Click on .

The following screen will be displayed:



In this example, the day care is sessional, and the client is to attend Amble Day Centre for the full day on Mondays and Thursdays, but for half a day on Wednesdays and Fridays.

- To return to the Schedule screen click on .

Swift - Costed Packages of Care - Recording a Scheduled Service

The following screen will be displayed:

Swift - W2KSWIFT - Remote Desktop

ATRN (asander) - Swift

File Edit Navigation Toolbar1 Configuration Window Help

Provisions for Mr Tony Person (72776)

Client Mr Tony Person (72776)

Provision Type Sessional - NCC Day Care-Day C Provider Amble Day Centre (Provider - Volunrar

Provision Actual Start 15-AUG-2007 Provision Actual End

Provs Author: NoSch Sched

Start & End Date

Start Date 15-AUG-2007 End Date

Std Wkly Cost 52.50 Variations NO Send for Auth

Alt Wkly Cost Alt Cost Rsn

Copy Total/Freq 6/Units/Weekly/non r

Contract Level

Div. Service CAREMNG Delegated budget for % On Code

Cost Centre PNINA Alnwick Intake/Uniqu Amt On Code

Subjective NCCDAY NCC Day Care Notes

Print Further Details < Back Next > Save

Std Wkly Cost

This is a view only field which will display the weekly cost for the service, based on what is recorded in the breakdown screen.

Total/Freq

This is a view only field which will display the total number of hours or units recorded on the breakdown screen.

- To return to the Provisions screen click on **Provs** (Provisions).

The following screen will be displayed:

Swift - W2KSWIFT - Remote Desktop

ATRN (asander) - Swift

File Edit Navigation Toolbar1 Configuration Window Help

Client Provisions for Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb...

Client Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb

Worker Gwen Dollin, Alnwick Intake/Unique Care Team - KEY WORKER, Alnwick Intake/Un

Find/New

L/Pad Provs

Start Date & Provision

15-AUG-2007 / Sessional - NCC

Provision Sessional - NCC Day Care-Day Care-Adult

Provider Amble Day Centre (Provider - Volunrar Contract

Planned Start Planned End

Actual Start 15-AUG-2007 Actual End

End Reason Statute Send for Auth

Authorised Date Joint Send to Service

Carer Service

Payment Type Placement

Gross Net Short Long N/A SA

Print Further Details < Back Next > Save

The Provision and Provider fields are now greyed out. This shows that the Further Details screens are completed for this provision.

Note: before sending the service you may want to check the details you entered are correct, as amendments cannot be made to the service once it is sent for authorisation.



- Click on the Send for Auth check box.
- Click on **Save**.

The service is now sent for authorisation.

Scheduled Services Recorded in Times

This section covers daily home care (but not overnight home care which is entered in units), and other services that are handled in times rather than units. The example used on the screen prints that follow is for home care but any service where the times are entered will be handled in exactly the same way.

Completing the Provisions Screen

- Click on  (Provisions).
- You will need to check that the service isn't already recorded. If it is then you need to refer to *Costed Packages of Care – Review of Services or Changes to Services Between Reviews* section of this manual.
- If other provisions are already recorded press  to obtain a new line in the Summary List.
- Complete the following fields:

Provider

Enter the provider of the service first (even though this is the second field on the screen). Refer to *Costed Packages of Care – About The Provisions Screen* section of this manual for further instructions if necessary.

Provision

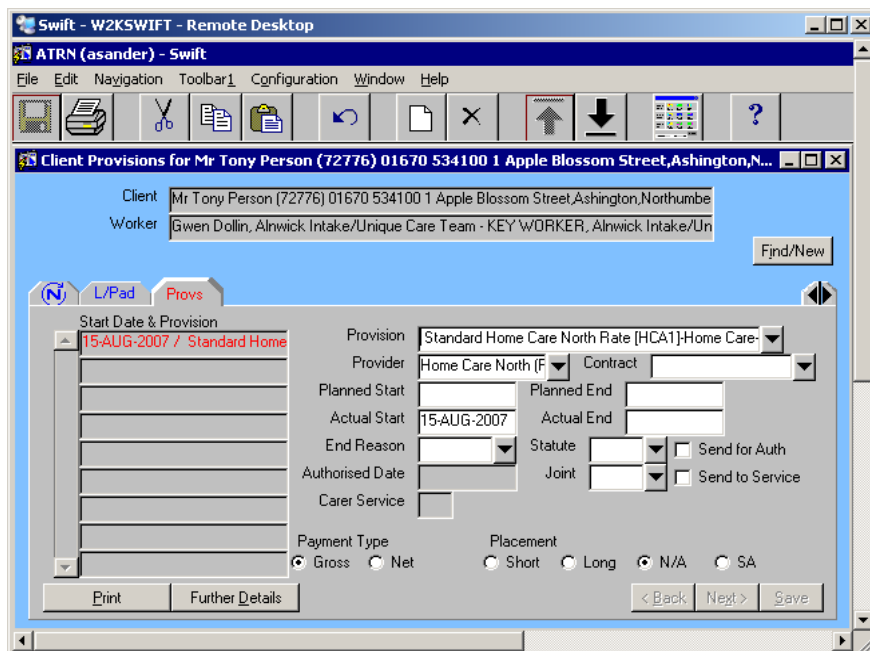
Enter the provision being provided to the client.

Actual Start

Enter the date the service starts or is agreed.

- Click on .

The following screen will be displayed:



The screenshot shows the 'Client Provisions' screen for Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumbria. The worker is Gwen Dollin, Alnwick Intake/Unique Care Team - KEY WORKER, Alnwick Intake/Un. The screen displays a list of provisions with the following details for the selected provision:

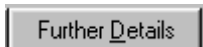

Start Date & Provision	Provision	Provider	Contract
15-AUG-2007 / Standard Home	Standard Home Care North Rate [HCA1] Home Care-	Home Care North (F)	

Additional fields for the provision include:

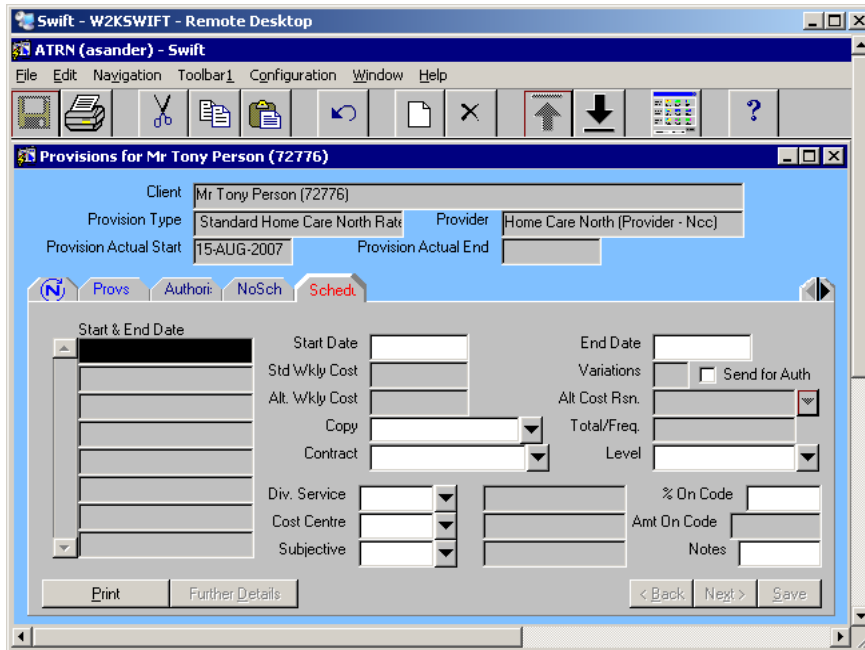
- Planned Start: [Empty]
- Planned End: [Empty]
- Actual Start: 15-AUG-2007
- Actual End: [Empty]
- End Reason: [Empty]
- Statute: [Empty]
- Send for Auth:
- Send to Service:
- Authorised Date: [Empty]
- Joint: [Empty]
- Carer Service:
- Payment Type: Gross Net
- Placement: Short Long N/A SA

Buttons at the bottom include Print, Further Details, < Back, Next >, and Save.

Completing the Schedule Screen

- Click on .
Note: notice that the provision and provider appears in the header at the top of the screen.
- As you are entering a scheduled service you need to click on  (Schedule).

The following screen will be displayed:



- Complete the following fields:

Start Date

Enter the start date of the service.

End Date

Enter the end date if the service has already taken place and the end date has passed, otherwise leave this field blank.

Div. Service

This field is completed automatically.

Cost Centre

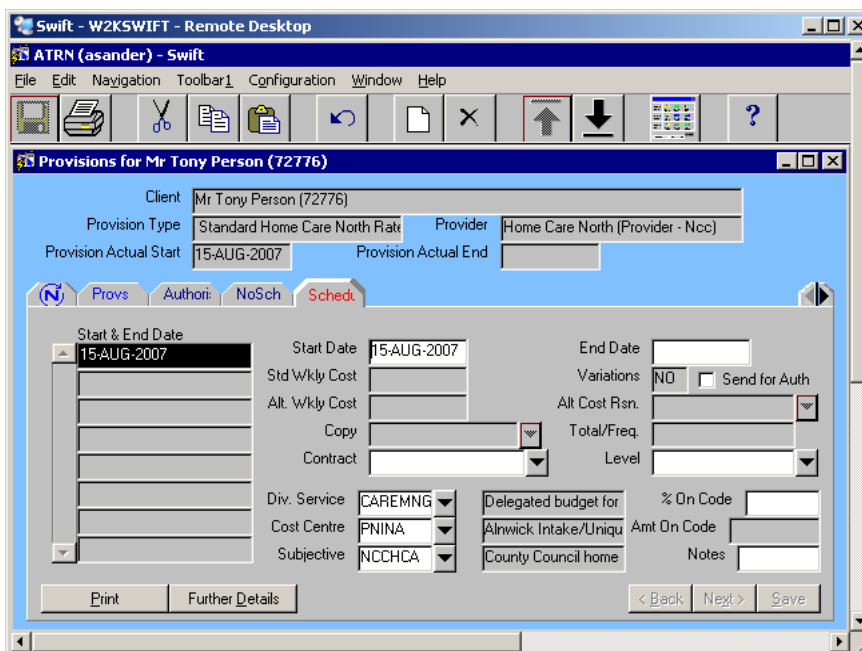
This field is completed automatically with the cost centre of the Key Team.

Subjective

This field is completed automatically.

- Click on .

The following screen will be displayed:

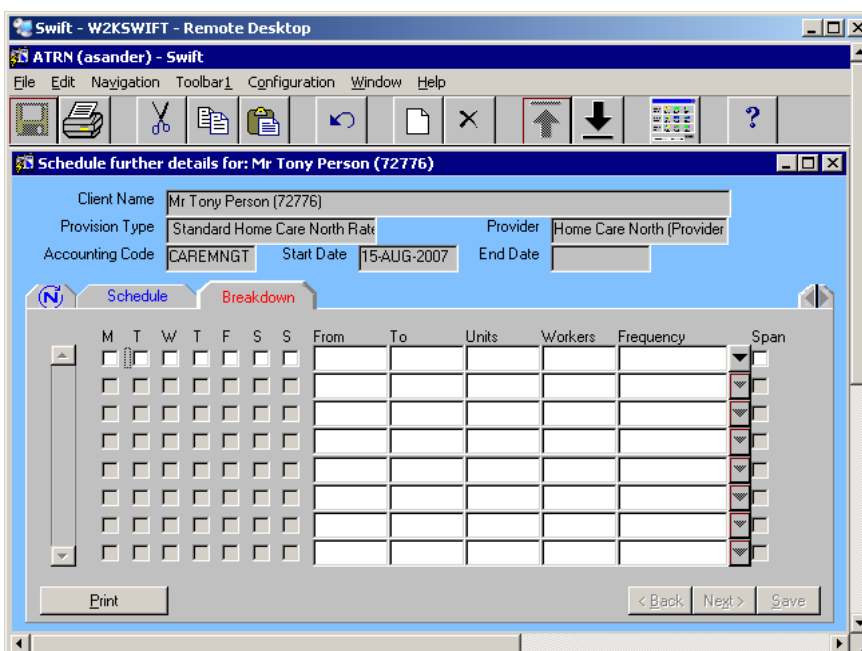


At this stage, there are no costs displayed on the Schedule screen. The costs will be calculated from the breakdown of the service at the next level.

Completing the Breakdown Screen

- Click on **Further Details**

The following screen will be displayed:



Note: you cannot mix times and units on the same screen. If a client is receiving home care during the day (times) and overnight home care (units) the overnight home care will need to be entered as a separate service on the Provisions screen.

Times can be exact, e.g. 9.00 am – 10.00 am; or approximate, e.g. 1 hour starting about 9; or left open, e.g. 1 hour sometime in the morning.

These are handled on the Breakdown screen as follows:

Exact

Enter the start and end times that the home care will actually attend the client, e.g. 9.00 – 9.30; 10.15 – 10.45.

Swift - Costed Packages of Care - Recording a Scheduled Service

Approximate

Enter the times around which the home care is expected but add 01 to the times, e.g. if the home care is expected at around 9.00 am for half an hour enter: 9.01 – 9.31; for around 10.15 for half an hour enter: 10.16 – 10.46.

Sometime in the morning/afternoon/evening/during the day

When the time is not known it should be entered on Swift as:

Sometime during the morning for half an hour would be: 11.02 – 11.32

Sometime during the afternoon for half an hour would be: 15.02 – 15.32

or 14.02 – 14.32

or 16.02 – 16.32

or 17.02 – 17.32

Sometime during the evening for half an hour would be: 18.02 – 18.32

Sometime during the day for half an hour would be: 13.02 – 13.32

- To enter the details into the breakdown screen complete the following fields:

M - S

Click into the appropriate box for each day of the week that the client receives the service.

From

Enter the time the service starts, e.g. 08.30.

Note: when entering times you must use the 24 hour clock.

To

Enter the time the service ends, e.g. 09.00.


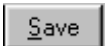
Workers

This field is used to indicate how many workers are needed to provide the service. When there is only 1 worker, this field is left blank.

Frequency

Click on the frequency that best relates to how often this breakdown is to be provided, e.g. Weekly, Fortnightly or Four Weekly.

In most cases it will be weekly. For instruction on how to insert a cyclical service on a schedule refer to *Costed Packages of Care – Recording a Cyclical Service* section of this manual.

- To enter the next time band on the breakdown screen press .
- Repeat as necessary, completing the day(s), start and end times, and the frequency until all of the times the client is to receive the service are entered.
- Click on .

Example

A client is to receive home care from 8.30 am – 9.00 am on a Monday and Wednesday; also 1 hour about 10.30 am on a Thursday; and also for 1½ hours sometime on a Friday afternoon. The breakdown screen would be completed like this:

The following screen will be displayed:

A separate line must be completed for each time band.

- To return to the Schedule screen click on [Schedule](#).

The following screen will be displayed:

Std Wkly Cost

This is a view only field which will display the weekly cost for the service, based on what is recorded in the breakdown screen.

Total/Freq

This is a view only field which will display the total number of hours or units recorded on the breakdown screen.


- To return to the Provisions screen click on [Provs](#) (Provisions).

The following screen will be displayed:

The screenshot shows a remote desktop window titled 'Swift - W2KSWIFT - Remote Desktop'. The application window is 'ATRN (asander) - Swift' with a menu bar (File, Edit, Navigation, Toolbar, Configuration, Window, Help) and a toolbar. The main window is 'Client Provisions for Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb...'. It shows client and worker details, a 'Find/New' button, and a 'Provs' tab. A table lists provisions, with the first one selected: '15-AUG-2007 / Standard Home'. To the right is a form with fields for 'Provision', 'Provider', 'Planned Start', 'Planned End', 'Actual Start', 'Actual End', 'End Reason', 'Statute', 'Authorised Date', 'Joint', 'Carer Service', 'Payment Type', and 'Placement'. The 'Provision' and 'Provider' fields are greyed out. At the bottom are 'Print', 'Further Details', '< Back', 'Next >', and 'Save' buttons.

The Provision and Provider fields are now greyed out. This shows that the Further Details screens are completed for this provision.

Note: before sending the service you may want to check the details you entered are correct, as amendments cannot be made to the service once it is sent for authorisation.

- Click on the Send for Auth check box.
- Click on .

The service is now sent for authorisation.

RECORDING A NON SCHEDULED SERVICE

A non scheduled service is one that happens continuously or is one off and cannot be broken down into different days of the week, e.g. residential care, nursing care or short break care. The screen prints used in this section are for residential care but the method is the same whichever service you are entering.

Completing the Provisions Screen

- Click on  (Provisions).
- You will need to check that the service isn't already recorded. If it is then you need to refer to *Costed Packages of Care – Review of Services or Changes to Services Between Reviews* section of this manual.
- If other provisions are already recorded press  to obtain a new line in the Summary List.
- Complete the following fields:

Provider


Enter the provider of the service first (even though this is the second field on the screen). Refer to *Costed Packages of Care – About The Provisions Screen* section of this manual for further instructions if necessary.

Provision

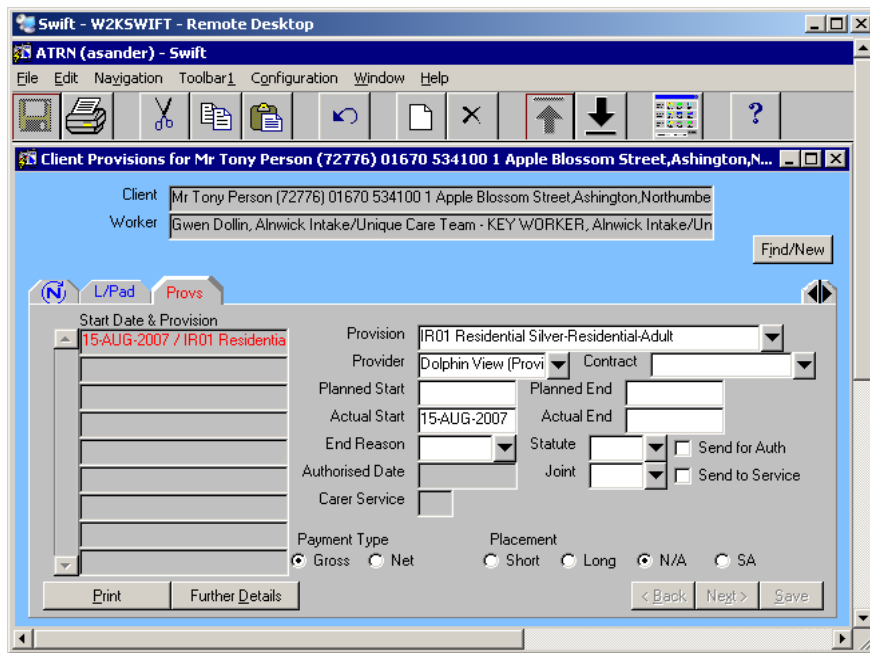
Enter the provision being provided to the client.

Actual Start



Enter the date the service starts or is agreed.

- Click on .

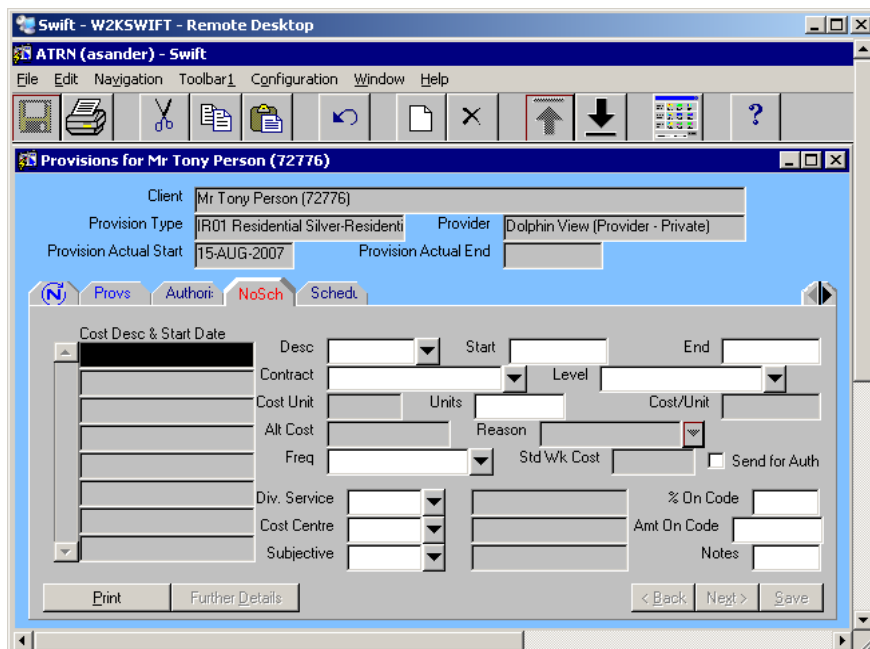
The following screen will be displayed:



Completing the Non Schedule (NoSch) Screen

- Click on .
- Click on  (Non Schedule).

The following screen will be displayed:



- Complete the following fields:

Desc

Enter the description of the service. For example; Residential/Nursing Care, Short Break or Miscellaneous.

Start

Enter the start date of the service.

End

Enter the end date if the service has already taken place or if the service is short break care. If the service is one-off, e.g. a miscellaneous payment you must enter the same end date as start date. Otherwise leave this field blank.

Units

Enter 1.

Cost/Unit

This field is view only. For provisions with a standard cost, the cost per unit will display. For provisions with an alternative cost, this field can be ignored, it will display 0.01.

Alt Cost (Alternative Weekly Cost)

If the cost is a standard cost then this field will be greyed out and there will be no need to input anything. However, if the cost is not a standard cost you will need to enter the full weekly cost, or the actual cost if it is a one off cost.

Reason

If you have entered an alternative cost then enter the reason of **Alternative Cost**.

Frequency

Enter the frequency.

Note: the frequency for residential, nursing or short break care, is Residential.

Std Wk Cost

This is a view only field which will display the weekly cost for the service.

Div. Service


This field is completed automatically.

Cost Centre

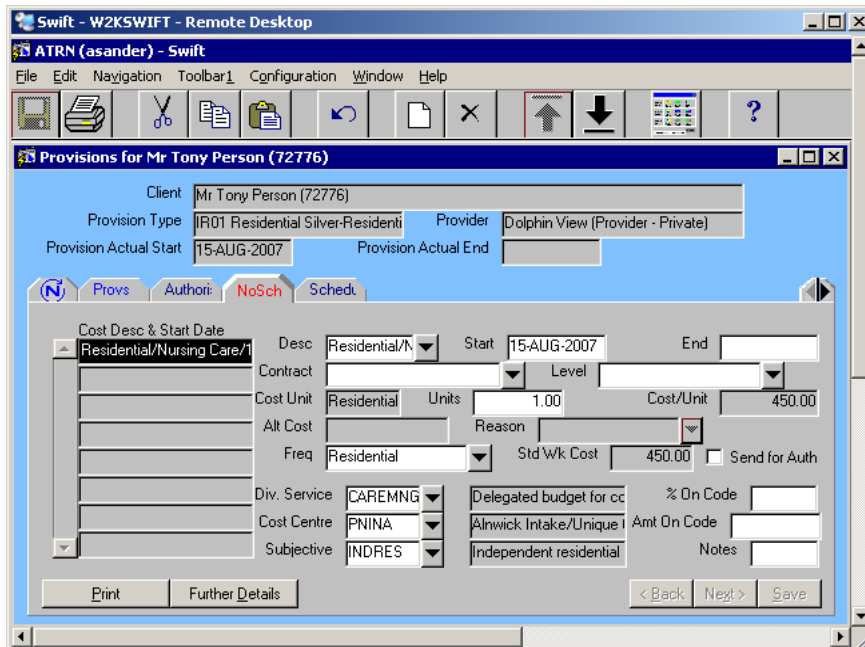
This field is completed automatically with the cost centre of the Key Team.


Subjective

This field is completed automatically.

- Click on .


The following screen will be displayed:



- To return to the Provisions screen click on  (Provisions).

Note: before sending the service you may want to check the details you entered are correct, as amendments cannot be made to the service once it is sent for authorisation.

- Click on the Send for Auth check box.



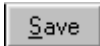
- Click on .

The service is now sent for authorisation.

Recording Short Break Care

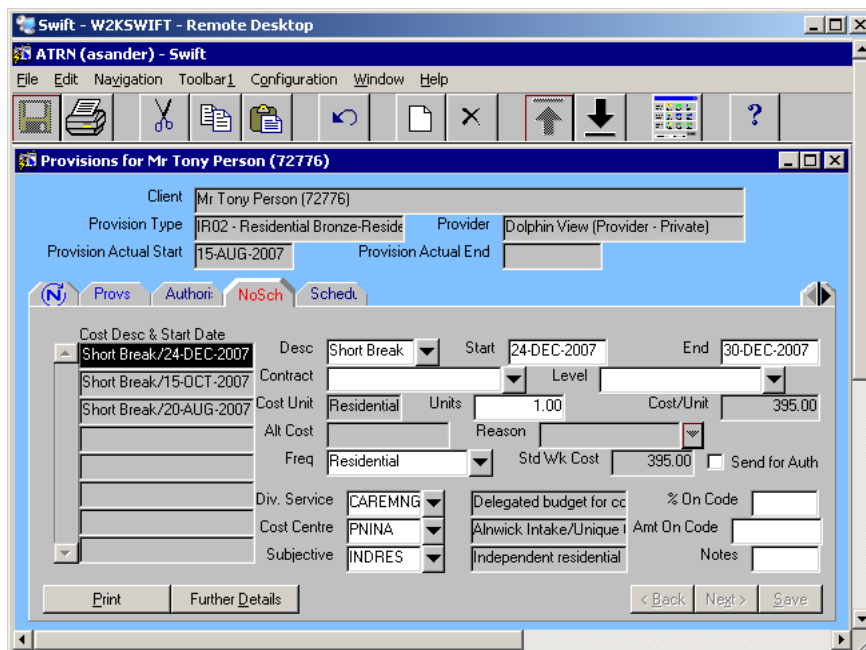
If the client is to receive several periods of short break care with the same provider/provision then these can be entered on the NoSch screen at the same time.

*Note: the Desc field will always be **Short Break** – do not select Residential.*

- Complete the NoSch screen with the details of the first period of short break care. Refer to *Costed Packages of Care – Completing the Non Schedule (NoSch) Screen* section of this manual.
- When the details of the first period are entered click on .
- Press .
- Enter the details for the second period of short break care and then click on .
- Repeat this process until all the periods of short break care are entered for the client.

Example A client is to receive three weeks of short break care in a bronze room at Dolphin View. 1 week in August, 1 week in October and 1 week in December.

The following screen will be displayed:



The screenshot shows the 'Swift - W2KSWIFT - Remote Desktop' window. The main window title is 'ATRN (asander) - Swift'. The menu bar includes 'File', 'Edit', 'Navigation', 'Toolbar1', 'Configuration', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. The main content area is titled 'Provisions for Mr Tony Person (72776)'. It shows client details: Client: Mr Tony Person (72776), Provision Type: IR02 - Residential Bronze-Reside, Provider: Dolphin View (Provider - Private), Provision Actual Start: 15-AUG-2007, Provision Actual End: (empty). Below this are tabs for 'Provs', 'Authori', 'NoSch', and 'Sched'. The 'NoSch' tab is active. It displays a table of short break periods:

Cost Desc & Start Date	Desc	Start	End
Short Break/24-DEC-2007	Short Break	24-DEC-2007	30-DEC-2007
Short Break/15-OCT-2007			
Short Break/20-AUG-2007			

Below the table, there are fields for 'Contract', 'Level', 'Cost Unit', 'Units', 'Cost/Unit', 'Alt Cost', 'Reason', 'Freq', 'Std Wk Cost', 'Send for Auth', 'Div. Service', 'Delegated budget for cc', '% On Code', 'Cost Centre', 'Alnwick Intake/Unique I', 'Amt On Code', 'Subjective', 'Independent residential', and 'Notes'. At the bottom, there are buttons for 'Print', 'Further Details', '< Back', 'Next >', and 'Save'.

A separate line must be completed for each period of short break care.

RECORDING A CYCLICAL SERVICE

A cyclical service is recorded in the same way as a scheduled service, however there are a few things you need to do slightly differently:

Where the cycle is 1 week in 2 or 1 week in 4

Provisions Screen

A new provision must be entered on the Provisions screen even if the provider and provision are already recorded due to a regular service currently taking place.

Note: select the same provider and provision as you would if it was a regular service.

Schedule Screen

Start Date

This date must be in line with the start date of the first cycle.

Breakdown Screen

Frequency

Enter either **Fortnightly** or **Four Weekly**.

Note: you must not use different frequencies on the same screen (e.g. Weekly (non residential) and Fortnightly). Instead, you must record the same provider/provision again on the Provisions screen in order to split the different frequencies.

Refer to *Costed Packages of Care – Recording a Scheduled Service* section of this manual.

Where the cycle is other than 1 week in 2 or 1 week in 4

Provisions Screen

Provision

The frequency is selected via the provision. The provision selected will start with the format **Every 1 in 3** or **Every 3 in 4**, for example. If there isn't a provision for the cycle you wish to record you will need to contact the Contracts Section.

Note: the costs for the cycle are already calculated within the provision.

Schedule Screen

Start Date

This date must be in line with the start date of the first cycle.

Std Wkly Cost

Once the Breakdown Screen is completed, the weekly cost for the service will display on this screen. Swift will calculate the average weekly amount from the provision selected and the times entered on the breakdown screen.

Breakdown Screen

Frequency

Enter **Weekly (non residential)**.

Note: the frequency is selected via the provision on the Provisions screen.

Refer to *Costed Packages of Care – Recording a Scheduled Service* section of this manual.

Scenario	Handled on Swift by:
<p>A client is to receive home care from the same provider for 1 hour every Monday, 2 hours every other Friday, and 3 hours on a Saturday every 4 weeks.</p>	<p>Three lines will need to be recorded on the Provisions Screen, using the same provider and provision.</p> <p>The same information will be recorded on the Schedule Screen, although you must ensure that the start date is in line with the first cycle.</p> <p>Under one provision, on the Breakdown Screen you will tick Monday, enter the times and select Weekly (non residential) as the frequency.</p> <p>Under the second provision, on the Breakdown Screen you will tick Friday, enter the times and select Fortnightly as the frequency.</p> <p>Under the third provision, on the Breakdown Screen you will tick Saturday, enter the times and select Four Weekly as the frequency.</p>
<p>A client is to receive day care from the same provider for a full day on Mondays, Tuesdays and Wednesdays, and also every 3 weeks on a Thursday.</p>	<p>Two lines will need to be recorded on the Provisions Screen.</p> <p>The full day on Mondays, Tuesdays and Wednesdays must be recorded as a normal scheduled service.</p> <p>For the service every 3 weeks on a Thursday, you must select a new line on the Provisions screen, enter the same provider, but you must use a provision starting with the words "Every 1 in 3". (If there isn't an appropriate provision you would need to contact the Contracts Section for one to be set up).</p> <p>The standard information will be recorded on the Schedule Screen, although you must ensure that the start date is in line with the first cycle.</p> <p>On the Breakdown Screen you will tick Thursday, enter the units and select Weekly (non residential) as the frequency. (The frequency is picked up from the provision you selected on the Provisions Screen).</p>

AMENDING A SERVICE

If the service provided is changing due to a review or there is a change to services between reviews refer to *Costed Packages of Care – Review of Services or Changes to Services Between Reviews* section of this manual. However, you may find that you need to amend current information that is entered into the CPC module due to an error.

You can amend a service either; before it is sent for authorisation, after the service has been authorised, or after the authorisation has been rejected by the team manager.

Note: if the team manager notices an error, or needs an amendment to be made before authorising the service, it will be rejected. The service can then be amended and re-sent for authorisation.

If you have sent a service for authorisation from the Provisions screen you cannot amend the information until it is either authorised or rejected by the team manager.



Note: you may need to contact the team manager and ask them to reject the service so that you can then make the amendment.

If you have sent a schedule or non schedule for authorisation and it needs to be amended, you can amend the information and then re-send for authorisation.

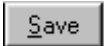
Amending the Provisions Screen

If you need to amend either the provider or the provision and they are greyed out, refer to *Costed Packages of Care – Deleting a Service* section of this manual.

The only fields that you can amend on the provisions screen are the date fields:

- Click on  (Provisions).
- Click on the service in the summary list that you want to amend.
- Amend the date and click on .

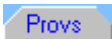
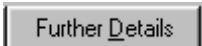

The Send for Auth box becomes unchecked if the date you enter is earlier than the original date. Therefore if necessary:

- Click on the Send for Auth check box to re-enter the tick.
- Click on .

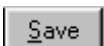
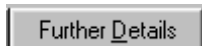
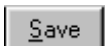
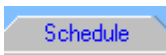
Note: amending the start date for a service on the Provisions screen will automatically change the date of the very first schedule or non schedule on the Schedule or Non Schedule screen. If you wish to amend the date of a service that isn't the very first schedule or non schedule refer to Costed Packages of Care – Amending a Service – Amending a Scheduled Service or Costed Packages of Care – Amending a Service – Amending a Non Scheduled Service sections of this manual.

The dates on the Schedule or Non Schedule screens are the dates that affect the budget therefore you must ensure that these dates are amended correctly.

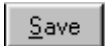
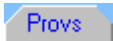
Amending a Scheduled Service

- Click on  (Provisions).
- Click on the service in the summary list that you want to amend.
- Click on .
- Click on  (Schedule).
- Click on the schedule in the summary list that you want to amend.
- Amend any fields on this screen.

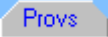
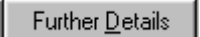
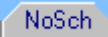
Note: the cost centre will always default to the cost centre of the Key Team recorded in the Frontdesk module, therefore if the cost centre is incorrect you may also need to amend the Key Team. Refer to the Frontdesk manual – Involvements.

- Click on .
- If you need to make any changes to the days, times or units click on 
 - Amend either the days, times or units.
 - Click on .
 - To return to the Schedule screen click on .


If your amendment has increased the cost of the schedule, you will need to re-send the schedule for authorisation.

- Click on the Send for Auth check box to re-enter the tick.
- Click on .
- To return to the Provisions screen click on  (Provisions).


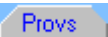
Amending a Non Scheduled Service

- Click on  (Provisions).
- Click on the service in the summary list that you want to amend.
- Click on .
- Click on  (Non Schedule).
- Amend any fields on this screen.

Note: the cost centre will always default to the cost centre of the Key Team recorded in the Frontdesk module, therefore if the cost centre is incorrect you may also need to amend the Key Team. Refer to the Frontdesk manual – Involvements.

- Click on .

If your amendment has increased the cost of the non schedule, you will need to re-send the non schedule for authorisation:

- Click on the Send for Auth check box to re-enter the tick.
- Click on .
- To return to the Provisions screen click on  (Provisions).

DELETING A SERVICE

If you find that you have either; entered a service in error, found that a service did not take place, or the wrong provider or provision has been entered, contact the Systems Support Help Line on 01670 622450 who will delete the service from Swift for you. It is important that the cost is removed from the budget as soon as possible.

REVIEW OF SERVICES OR CHANGES TO SERVICES BETWEEN REVIEWS

At review it may be decided to increase or decrease a clients existing services or to continue with the current level of service provision. The following section deals with how this is handled on Swift.

No Change Review

Following a review, if there are no changes to the services provided to the client, then no further action needs to be taken in the CPC module. However, you will need to update the Reviews screen. Refer to the *Assessments and Reviews manual – Recording Reviews*.

Change to Service Provision

Not all changes to service provision will happen at review, there may be changes between reviews. Whenever there is a change to service provision follow the instructions below:

This section deals with a change to an existing service, i.e. either an increase or decrease to a service that the client is already receiving. If a new service needs to be recorded following the result of a review refer to *Costed Packages of Care – Recording a Scheduled Service* or *Costed Packages of Care – Recording a Non Scheduled Service* sections of this manual.

Changes to a Scheduled Service

Example Following a review, the home care a client is receiving is to increase by 1 hour on a Monday. (The client already receives home care on a Wednesday and a Friday for 1 hour each day.)

There is no change to the provider and the provision on the Provisions screen. The change is carried out on the Schedule screen:

Note: the following screen prints show home care but day care and meals on wheels will be dealt with in the same way.

- Click on **Provs** (Provisions).
- Click on the service in the summary list that you want to change.

The screenshot shows the 'Provs' screen in the Swift software. The client is Mr Tony Person (72776). The provision list includes 'Standard Home Care North Rate [HCA1] Home Care' starting on 15-AUG-2007. The detailed view shows the provider as 'Home Care North', the planned start as 15-AUG-2007, and the actual start as 15-AUG-2007. The 'Further Details' button is highlighted.

- Click on **Further Details**.
- Click on **Sched** (Schedule).

The following screen will be displayed:

The screenshot shows the 'Sched' screen in the Swift software. The provision is 'Standard Home Care North Rate' starting on 15-AUG-2007. The standard weekly cost is 35.00. The total frequency is 3:30/Hours/Weekly. The 'Sched' button is highlighted.

Swift - Costed Packages of Care - Review of Services or Changes to Services Between Reviews


As this is a change to the existing service, end the old schedule and then enter a new schedule:

Note: when changing an existing cyclical service you must ensure that the dates you use are in synch with the cycle.

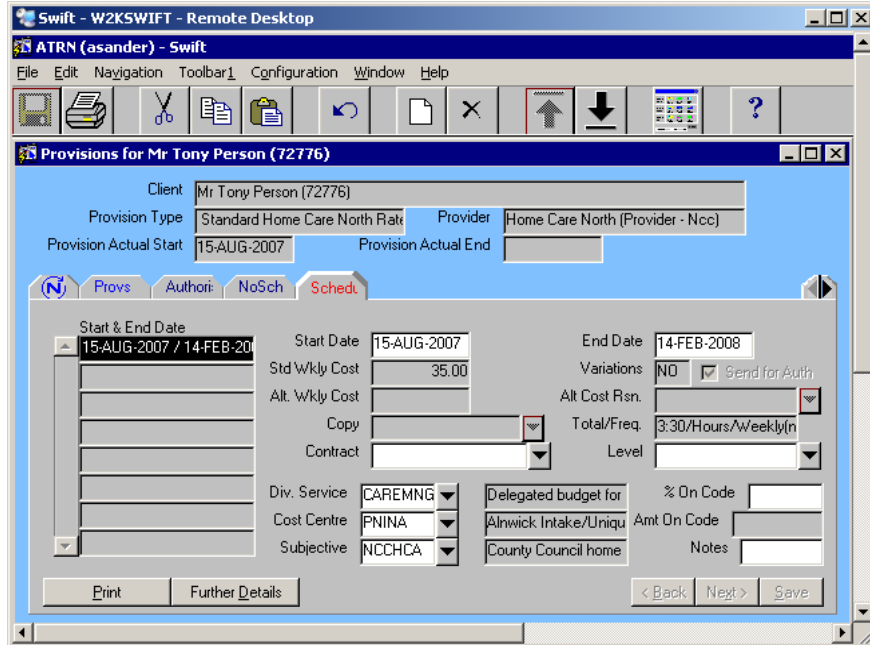
- Complete the following field:

End Date


Enter the date that this schedule is to end (this may be the day before the new schedule starts).

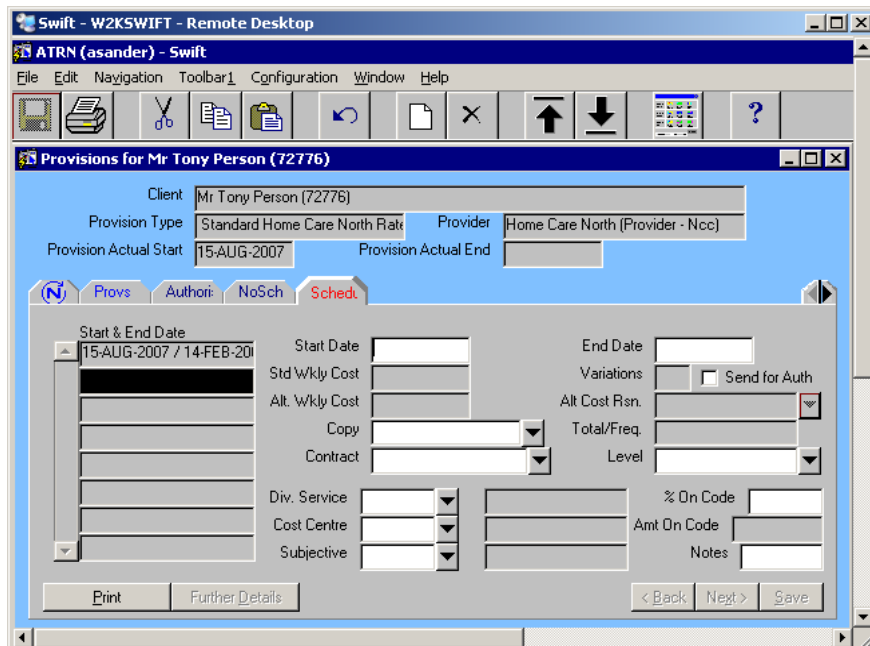
- Click on .

The following screen will be displayed:



The screenshot shows the 'Sched.' tab in the software. The 'Start & End Date' section is highlighted, showing a start date of 15-AUG-2007 and an end date of 14-FEB-2008. Other fields include Std Wkly Cost (35.00), Variations (NO), and Send for Auth (checked). The 'Provs' tab is also visible, showing a list of provisions.

- Press .
- A blank Schedule screen is displayed:



The screenshot shows the 'Sched.' tab in the software. The 'Start & End Date' section is highlighted, showing a start date of 15-AUG-2007 and an end date of 14-FEB-2008. Other fields are empty.

- Enter the new schedule and breakdown details. Refer to *Costed Packages of Care – Recording a Scheduled Service – Completing the Schedule screen* section of this manual.

Note: there is a drop down box labelled Copy. This allows you to copy the previous schedules breakdown screen to the schedule you are creating. It is only useful if minor amendments are needed. Click on the drop down box and select the previous schedule. Then go into the copied breakdown screen and amend the details as necessary.

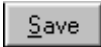
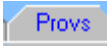
Swift - Costed Packages of Care - Review of Services or Changes to Services Between Reviews

Note: when you click on Copy to begin copying the breakdown details from a previous schedule you will be presented with a list which may include schedules that do not relate to the provision on which you are working. You must be particularly cautious when using this facility to ensure that you select the correct schedule to copy from.

The following screen will be displayed:

The screenshot shows a remote desktop window titled 'Swift - W2K5WIFT - Remote Desktop'. The application window is 'ATRN (asander) - Swift'. The main title is 'Provisions for Mr Tony Person (72776)'. The client name is 'Mr Tony Person (72776)'. The provision type is 'Standard Home Care North Rate' and the provider is 'Home Care North (Provider - Ncc)'. The provision actual start date is '15-AUG-2007'. The 'Schedule' tab is selected, showing a list of schedules. The first schedule is highlighted with a start date of '15-FEB-2008'. The 'Send for Auth' checkbox is checked. The 'Save' button is highlighted.

You will need to send the new schedule for authorisation:

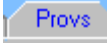
- Click on the Send for Auth check box.
- Click on .
- To return to the Provisions screen click on  (Provisions).

Changes to a Non Scheduled Service

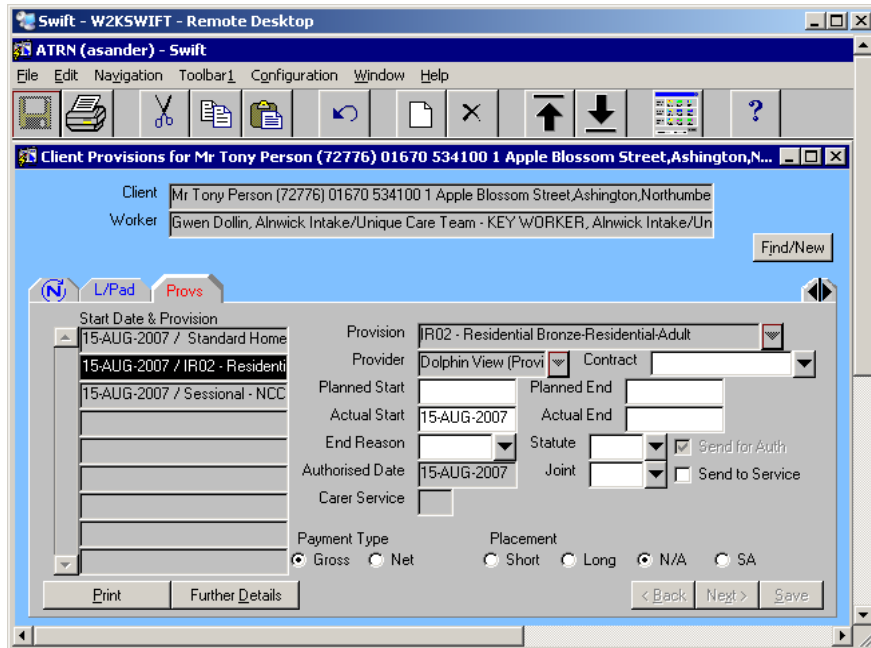
Example A client has had one period of short break care and is to receive a further two periods.

There is no change to the provider and the provision on the Provisions screen. The change is carried out on the Non Schedule screen:

Note: the following screen prints show short break care but any non scheduled services will be dealt with in the same way.

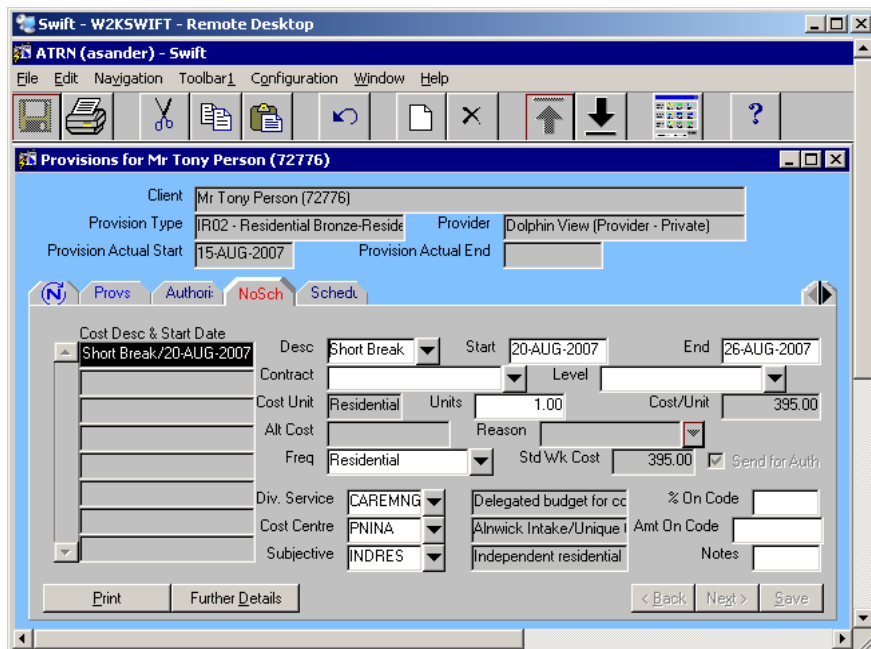
- Click on  (Provisions).
- Click on the service in the summary list that you want to change.

The following screen will be displayed:



- Click on **Further Details**.
- Click on **NoSch** (Non Schedule).

The following screen will be displayed:



As this is a change to the existing service, you may need to end the old non schedule and then enter a new non schedule:

Note: the old non schedule may already have an end date if it is a one-off payment or short break care.

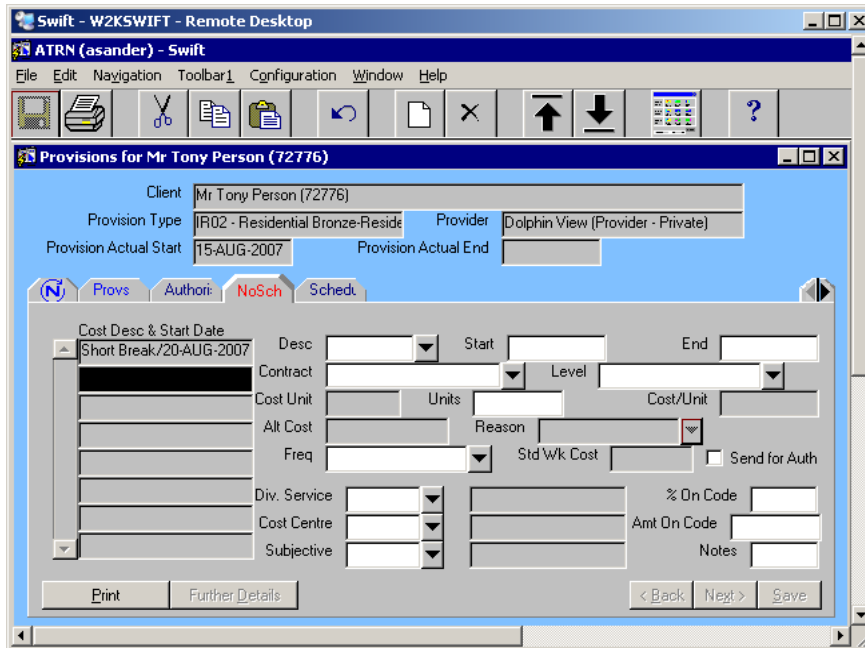
- If necessary complete the following field:

End

Enter the date that this non schedule is to end (this may be the day before the new non schedule starts).

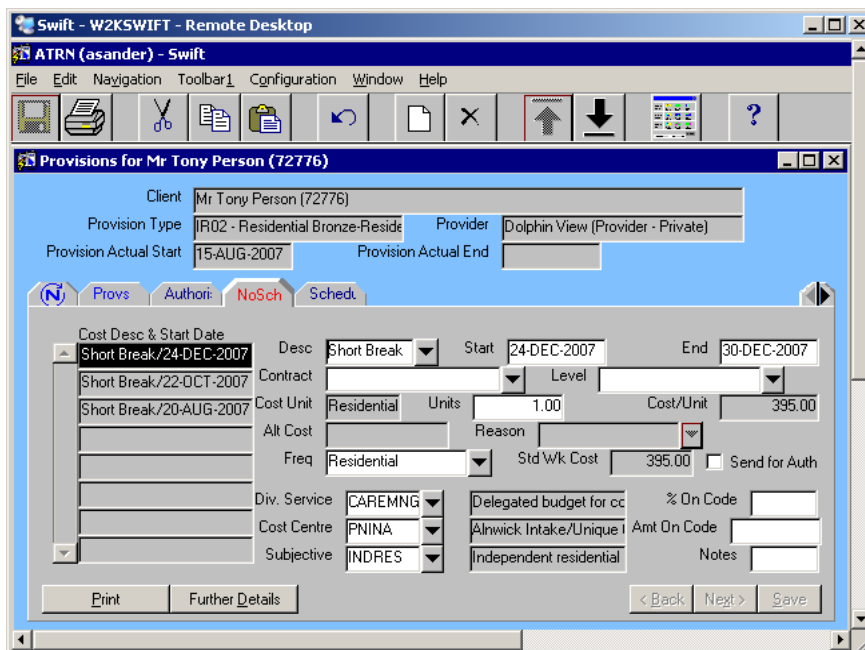
- Click on **Save**.
- Press **F6**.

A blank NoSch screen is displayed:



- Enter the next period of short break care. Refer to *Costed Packages of Care – Recording a Non Scheduled Service* section of this manual.
- Click on **Save**.
- Repeat this process until all future periods of short break care are entered.

The following screen will be displayed:



You will need to send all new non schedules for authorisation:

- Click on the Send for Auth check box.
- Click on **Save**.
- To return to the Provisions screen click on **Provs** (Provisions).

ENDING SERVICES


When a client stops receiving a service, it is important to end this service on Swift as soon as possible, so that the costs are no longer charged to the budget.

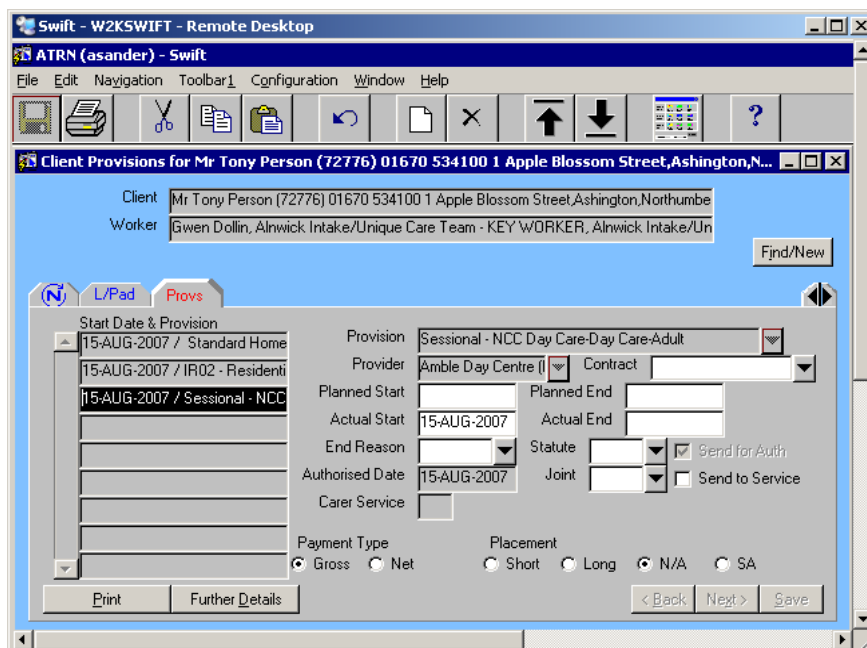
If the case has closed, or there is no longer an ongoing relationship between the client and the provider, end the service on the Provisions screen, refer to *Costed Packages of Care – Ending Services on the Provisions screen* section of this manual. If the relationship between the client and the provider is ongoing, end the service on the Schedule or Non Schedule screen, refer to *Costed Packages of Care – Ending a Service on the Schedule or Non Schedule screen* section of this manual.

Ending Services on the Provisions Screen

You must only end a service on the Provisions screen if the case has closed or if there is no longer an ongoing relationship between the client and the provider.

There is no need to record an end reason on the Provisions screen, however some end reasons are automatically entered, i.e. Death of client (when a clients date of death is recorded in the Frontdesk module).

- Click on  (Provisions).
- Click on the service in the summary list that you want to end.



The screenshot shows the 'Client Provisions for Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb...' window. The 'Provs' tab is active, showing a list of provisions. The selected provision is '15-AUG-2007 / Sessional - NCC'. The detailed view shows the following fields:

Start Date & Provision	Provision	Sessional - NCC Day Care-Day Care-Adult
15-AUG-2007 / Standard Home	Provider	Amble Day Centre (I) Contract
15-AUG-2007 / IR02 - Residenti	Planned Start	
15-AUG-2007 / Sessional - NCC	Actual Start	15-AUG-2007
	End Reason	
	Authorised Date	15-AUG-2007
	Carer Service	
	Payment Type	<input checked="" type="radio"/> Gross <input type="radio"/> Net
	Placement	<input type="radio"/> Short <input type="radio"/> Long <input checked="" type="radio"/> N/A <input type="radio"/> SA

Buttons at the bottom include 'Print', 'Further Details', '< Back', 'Next >', and 'Save'.

- Complete the following field:

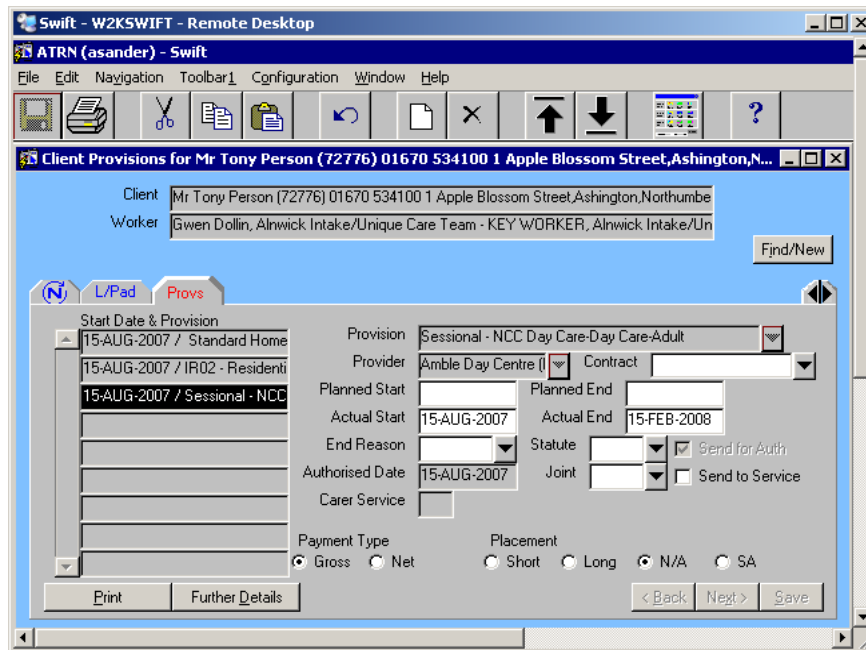
Actual End

Enter the end date of the service.

Note: by entering an end date here an end date will automatically be recorded on the Schedule or Non Schedule screen.

- Click on .

The following screen will be displayed:



The costs will no longer be charged to the budget.

- If more than one service is ending click on the next service in the summary list and enter the date in the Actual End field.

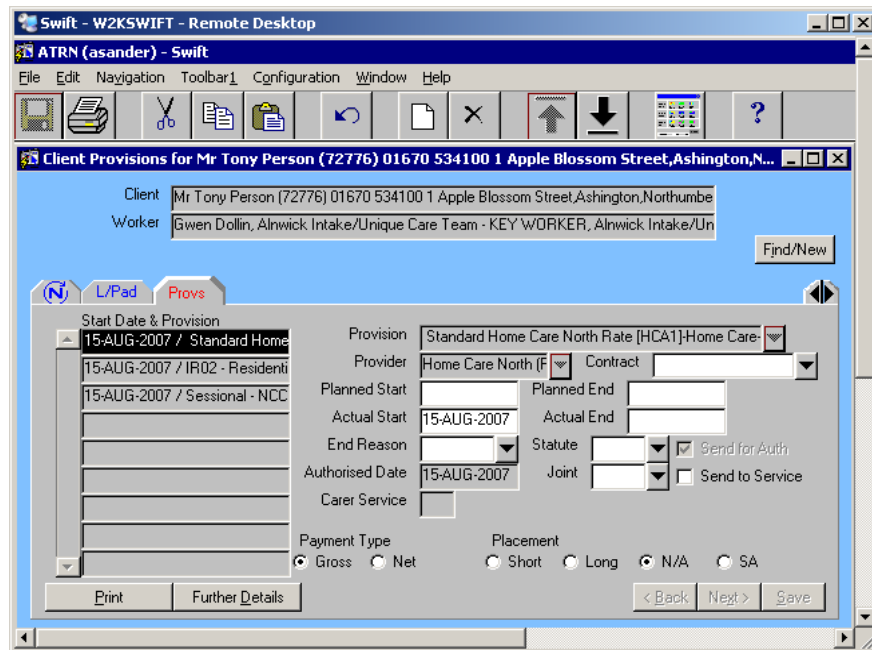
Ending a Service on the Schedule or Non Schedule Screen

If the case is not closing and the relationship between the client and the provider is ongoing, the service should be ended on the Schedule or the Non Schedule screen and the costs will no longer be charged to the budget. The end date should not be entered on the Provisions screen. If the client later requires the service then another schedule or non scheduled service can be added under the existing Provision. Refer to *Costed Packages of Care – Review of Services or Changes to Services Between Reviews* section of this manual.

The example used on the screen prints that follow is for a scheduled service but non scheduled services are handled in the same way.

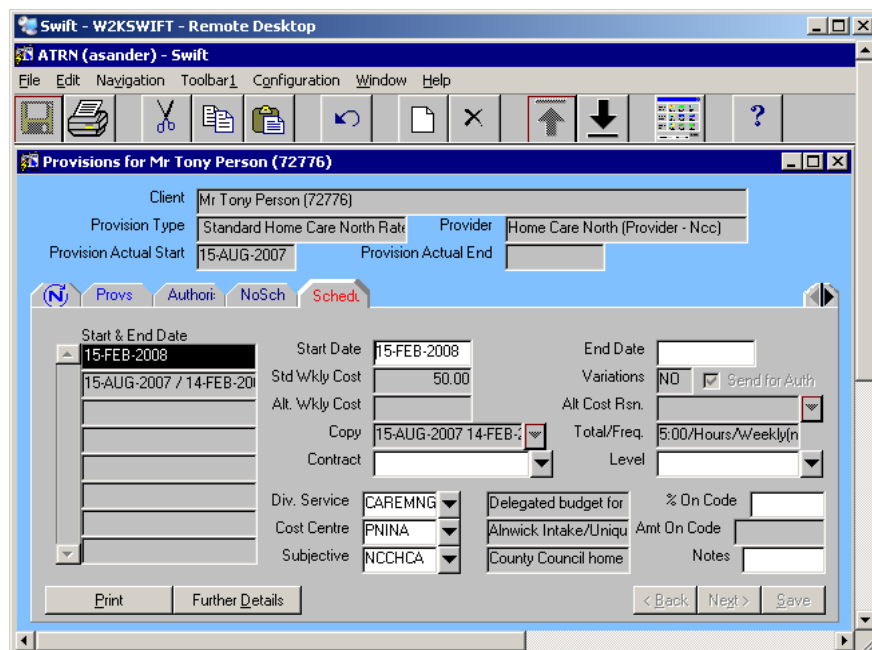
- Click on **Provs** (Provisions).
- Click on the service in the summary list that you want to end.

The following screen will be displayed:



- Click on **Further Details**.
- Click on **Sched** (Schedule).

The following screen will be displayed:



- Complete the following field:
End Date
Enter the end date of the service.
- Click on **Save**.

The following screen will be displayed:

The screenshot shows a software window titled 'Swift - W2K5WIFT - Remote Desktop'. Inside, there's a menu bar with 'File', 'Edit', 'Navigation', 'Toolbar1', 'Configuration', 'Window', and 'Help'. Below the menu is a toolbar with icons for print, copy, paste, undo, redo, and search. The main area is titled 'Provisions for Mr Tony Person (72776)'. It shows 'Client: Mr Tony Person (72776)', 'Provision Type: Standard Home Care North Ratt', and 'Provider: Home Care North (Provider - Ncc)'. There are fields for 'Provision Actual Start: 15-AUG-2007' and 'Provision Actual End'. Below this is a tabbed interface with 'Provs', 'Authori', 'NoSch', and 'Sched' tabs. The 'Provs' tab is active, showing a list of provisions with columns for 'Start & End Date', 'Start Date', 'End Date', 'Std Wkly Cost', 'Alt. Wkly Cost', 'Copy', 'Contract', 'Div. Service', 'Cost Centre', and 'Subjective'. The first row is highlighted in blue, indicating it requires Team Manager action. Below the list are fields for 'Delegated budget for', '% On Code', 'Amt On Code', and 'Notes'. At the bottom are buttons for 'Print', 'Further Details', '< Back', 'Next >', and 'Save'.

The costs will no longer be charged to the budget.

- To return to the Provisions screen click on **Provs** (Provisions).

Ending All Services if the Client Has Died

If the client has died, you will need to make sure that all services are ended in the CPC module. However, you must not close the services for the client in the CPC module you must use the Frontdesk module. Refer to the *Frontdesk manual – Closing a Case Due to Death of Client*.

Note: if any services ended earlier than the date of death, CPC will need to be amended to reflect this.

VIEWING WHICH SERVICES ARE AUTHORISED

Viewing the Provisions Screen

Colour coding of the lines on the summary list of the Provisions screen can denote the authorised status of a service:

- ◇ Red (requires user action) – A non schedule/schedule exists that is either rejected or not yet sent for authorisation.
- ◇ Blue (requires Team Manager action) – A non schedule/schedule exists that has been sent for authorisation but not yet authorised.
- ◇ Black (authorised) – All records are authorised.

Viewing the Authorisation Screen

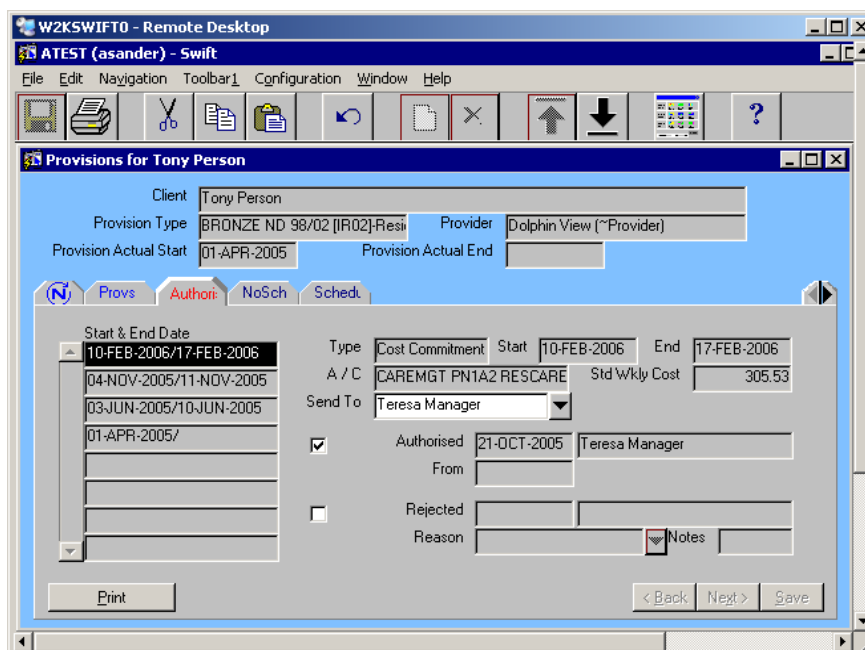
Although the Provisions screen shows the authorised status of a service and the date a service was first authorised it does not tell you when a subsequent service from the same provider has been authorised, for example an additional period of short break care or a change to the level of home care.

This can be viewed on the Authorisation screen:

- Click on **Provs** (Provisions).
- Click on the service in the summary list that you want to view the authorisations for.
- Click on **Further Details**.

- Click on **Authori:** (Authorisation).

The following screen will be displayed:



The screen displays any services that have been authorised or rejected by the team manager.

- You can view the following fields:

Type

Type of item being authorised. This will either display Provision, Schedule (e.g. home care), or Cost Commitment (e.g. short break care).

Start

Start date of the service being authorised.

End

End date of the service being authorised.

A / C

Budget management account the commitment was allocated to.

Std Wkly Cost

Cost of the service for a week.

Send To

This field may display the name of the team manager the authorisation request was sent to.

Authorised Check Box

If the service has been authorised there will be a tick in this box.

Authorised From Date

If the service has been authorised the date it was authorised may be displayed.

Note: this date does not affect the cost commitment. The box to the right details the name of the person who authorised the provision. If the service was automatically authorised the box will display 'Below Threshold Automatic Authorisation'.

Rejected Check Box

If the service has been rejected there will be a tick in this box.

Note: the two boxes to the right will detail the date of rejection and the name of the person who rejected the provision.

Reason

Rejection reason.

Notes

There may be additional notes about why the service was rejected.

Swift - Costed Packages of Care - Viewing the Costs of Services

There will always be a line in the summary list relating to the initial authorisation of the provision, and then subsequent lines relating to the authorisation of cost commitments recorded on either the Non Schedule screen or the Schedule screen.


If a service is amended after authorisation it is re-sent for authorisation and subsequently authorised. It is important to note that the Authorisation screen will always show the original authorisation prior to the amendment.

Note: the Authorisations screen will show a history of all authorisations before and after any amendments of the cost commitments.

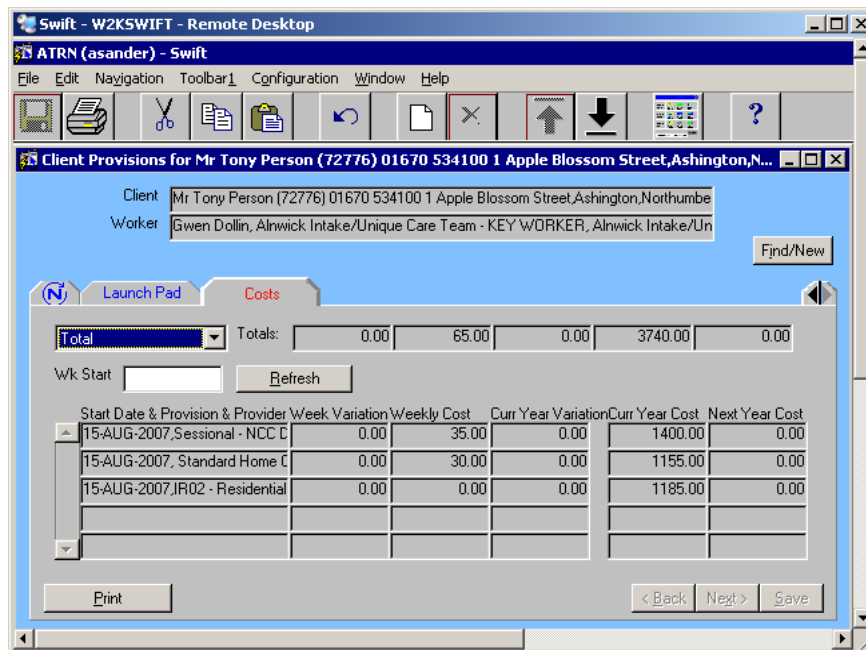
Do not use the Authorisations screen to view the cost commitments, refer to *Costed Packages of Care – Viewing the Costs of Services* section of this manual.

VIEWING THE COSTS OF SERVICES

Swift records the total cost of each service and the total of all services provided to the client for the current financial year and the next financial year (based on services continuing).

- Click on  (Provisions).
- Click on the  (Forward Scroller).

The following screen will be displayed:



Totals

To view the total cost of the plan **Total** must be selected. To view the costs on the plan that have been authorised, **Authorised** must be selected. To view the costs on the plan that have not been authorised, **Unauthorised** must be selected.

Weekly Cost

The weekly cost of the service, for the week you are viewing the screen. i.e. This week. For example; if a service has ended, if a service is short break care that is not this week, or if a service was a one off payment in the past, zero will display here.

Note: where a client is receiving cyclical services this will be the average weekly cost.

Curr Year Cost

The cost of the service from the start date to the end of the current financial year.

Next Year Cost

The cost of the service for the next financial year, if it were to continue.

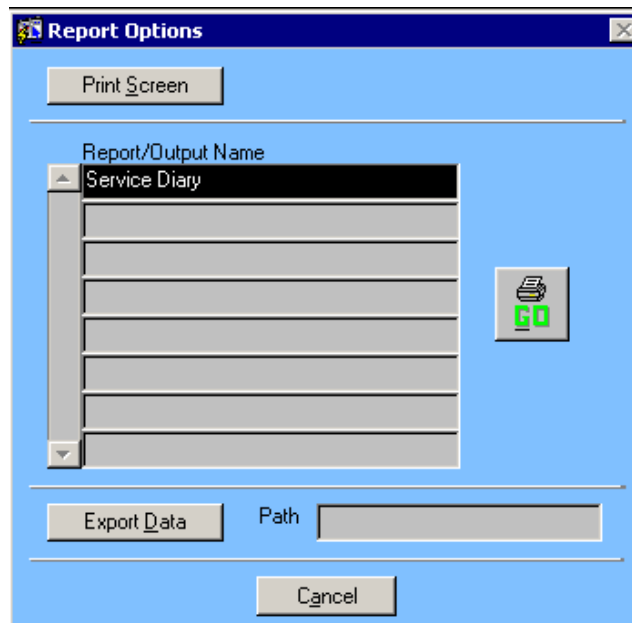
VIEWING/PRINTING THE SERVICE DIARY


It is possible to view/print a diary sheet of the current scheduled services a client is receiving (e.g. home care, day care and meals on wheels).

- Click on  (Provisions).
- Click on .

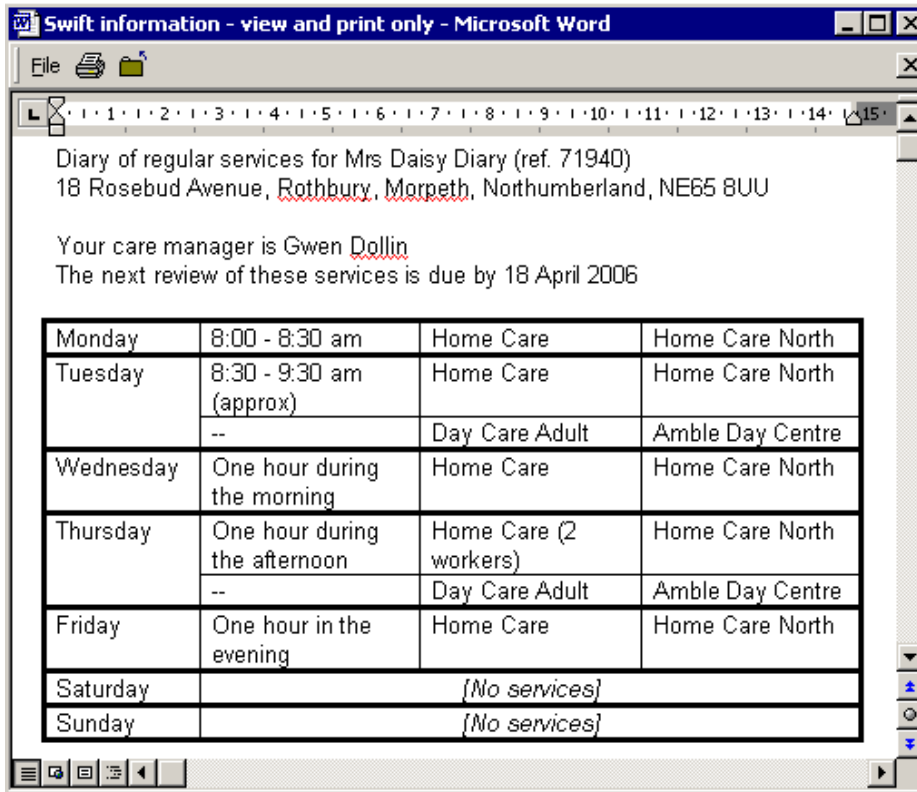
Note: you can also retrieve a client's service diary from the Frontsheet screen in the Frontdesk module.

The following screen will be displayed:




- Click on the report named Service Diary.
- Click on . The report may take a few seconds to appear on your screen.

Example Service Diary:


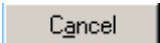


You only have view and print access to the service diary. If necessary, it is possible to copy and paste the information into Microsoft Word and edit it from there. If you see that any information is incorrect you will need to arrange for Swift to be updated accordingly and then re-run the service diary.

Printing the Service Diary

- Click on  Or you can click on File and Print.

Closing the Service Diary

- Click on  Or you can click on File and Close
- Click on  to return to Swift.

Note: the report will close but will leave a minimised Word window at the bottom left corner of your screen. This can be left open until you close Swift (if it is left open it makes it a little bit quicker to run subsequent reports).