

# Systems Support

## Swift Training



### Contact Notes

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Northumbria Healthcare   
NHS Foundation Trust

*In partnership with*

**NORTHUMBERLAND**  
COUNTY COUNCIL



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## ABOUT CONTACT NOTES

Contact notes are an electronic record of direct or indirect contact with a client and those associated with the client.

If anyone other than the key worker enters a contact note against a client the key worker will receive a workflow job. If the contact note is marked as a Significant Event, the workflow job will be entitled “Significant Event” otherwise the workflow job will be named “Check Contact Notes”. Refer to Workflow manual for further instruction.

## ACCESSING CONTACT NOTES



- Access [Contact Notes](#) via Launch Pad or by using navigate. Refer to *Basic Use of Swift* manual.
- If you have accessed Frontdesk via Launch Pad you will need to find the client. Refer to *Frontdesk* manual – *Finding a Person* section for guidance.

You will now have the relevant person displayed on the Contact Notes screen.


## ACCESSING CONTACT NOTES VIA WORKFLOW IN TRAY

- ◇ If you are the key worker of a client and another worker amends or updates the Contact Notes for that client you will automatically receive a workflow job on your Workflow In Tray called “Check Contact Notes” or “Significant Event”. The job is to notify you, as key worker of the client, that there has been an addition or alteration to the Contact Notes for a client on your caseload.
- ◇ If you are an additional professional worker with an involvement role of ‘Subscribed’ on a client record you will automatically receive a workflow job on your Workflow In Tray called “Contact Note (subscription)”. The job is to notify you that there has been an addition or alteration to the Contact Notes for a client you are an additional professional involvement for.

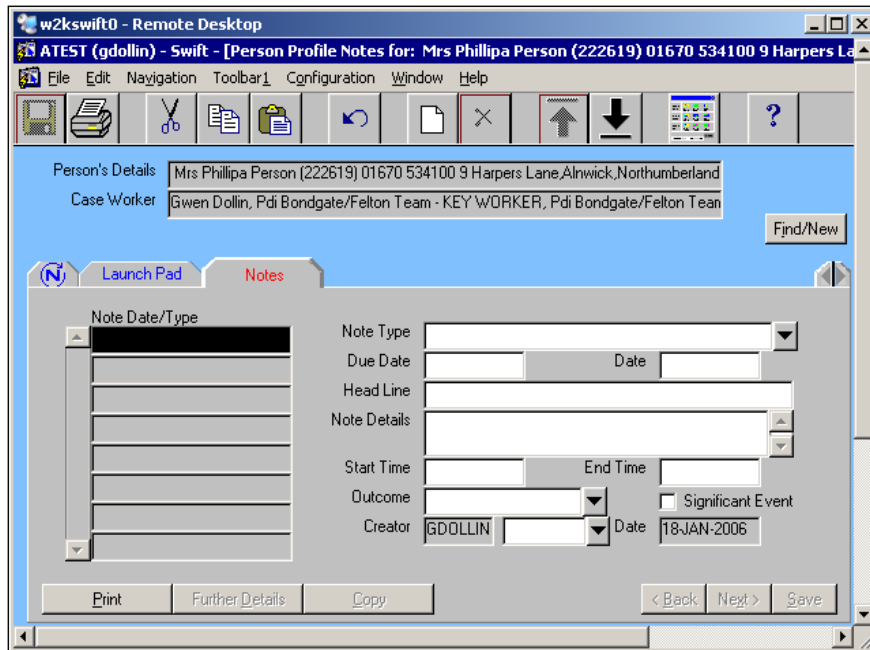
To view further details about the Contact Note;

- Click on the job type “Check Contact Notes”, “Significant Event” or “Contact Note (subscription)” from your Workflow In Tray.

*Note: you may have more than one “Check Contact Notes”, “Significant Event” or “Contact Note (subscription)” workflow job, therefore click on the one you wish to view in the summary list.*

- Click on  to retrieve the Contact Notes WF report that will detail the contact note entered. Please refer to *Swift Reports and Forms Manual – Retrieving a Report* section.

## RECORDING A CONTACT NOTE



- Press **F6** to create a new contact note.

*Note:* you will notice that your user name is automatically displayed in the Creator field and the current date is displayed in the Date field at the bottom of the screen.

- Complete the following fields:

### Note Type

Enter the appropriate note type.

### Date

Enter the date of the contact.

*Note:* do not enter a date in Due Date.

### Head Line

You must enter information in this field if this note is marked as a significant event, otherwise this field is optional.

*Note:* there is a limit of 200 characters in the Head Line field.

Refer to the relevant sections in this guidance on how to use copy and paste, the spell checker and other features available with the Enhanced Editor.

### Note Details

There are standards in relation to Contact Note recording on Swift. (Full information can be found in the Case File Recording Standards Document on the CM Handbook page on the intranet). All Contact Notes of 'face to face' contacts should include:

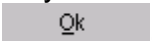
- **Date of contact**
- **Time of contact** (this should only reflect the actual time spent with the client/carer etc. and not travelling or other time)
- **Location of contact**

- **List of people present during contact**
- **Purpose of contact**
- **Outcome and actions of contact** (including any problems identified, disagreements and resolutions, referrals and reasons for referral, and any other decisions made and the reasons why)
- **These should be listed as separate and distinct headings.**

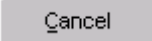
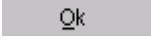
Double click in the Note Details field to display the Enhanced Editor window. You can type details directly into this field or you can use the copy and paste facility if these details are already recorded within an email or a Word document.

*Note: there is a limit of 32000 characters in the Note Details field which is about 10 pages of text.*

Refer to the relevant sections in this guidance on how to use copy and paste, the spell checker and other features available with the Enhanced Editor.

Once you have entered the relevant detail in the Enhanced Editor window click on .



If you click on  before you have clicked on  you will lose information entered in the Enhanced Editor window.

### **Start Time/End Time**

Enter the start time and end time of the contact. You must use the 24 hour clock and Swift allows you to be minute specific.

### **Outcome**

Select an appropriate Outcome for the type of note you are recording. Only certain contact note types require an Outcome to be entered.

### **Significant Event**

Tick this field if you wish to mark this note as a Significant Event.

### **Creator (first field)**

Your name will automatically display in the first field

### **Creator (second field)**

If you are recording the contact note on behalf of a colleague you should enter the colleague's name in the second field to indicate that it was entered on their behalf.

- Click on .

## **Copying and Pasting Contact Notes from Word into Swift**

It is possible to copy text from a word document or email into a Swift contact note. The benefits of doing this are:

- ◇ You can spell check the information in Word before you copy it into Swift.
- ◇ If you have not finished typing a contact note before you have to go out on a visit, you can save it in Word and go back to it when you return to the office. If you were

## Swift - Contact Notes - Using Spell Checker

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entering this directly into Swift once you saved the note you wouldn't be able to make any changes/additions.

- ◇ You may already have information in a Word report, email or an electronic form which you wish to enter as a contact note. Rather than re-typing this information you can copy it and paste it into Swift.


To copy and paste into Swift;

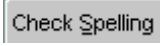
- Go to the client's Swift Contact Note screen and press **F6** to enter a new note.
- Enter the relevant Note Type and Date for the contact note.
- Open up the document or email you wish to copy the information from.
- Select the text you wish to copy by using your mouse to highlight the relevant information.

*Note: if you wish to copy all text from the document or email, press **CTRL** and **A** or go to the Edit menu and click on Select All.*

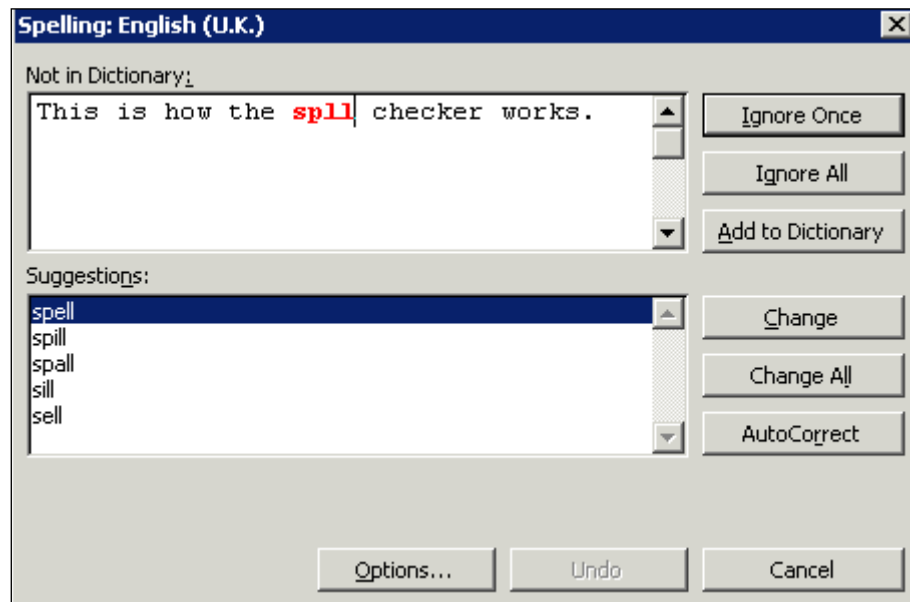
- Once the information is highlighted, press **CTRL** and **C** or go to the Edit menu and click on Copy or click  on the toolbar.
- Go to your Swift contact note and click in the Note Detail field.
- To paste the information into Swift, press **CTRL** and **V** or go to the Edit menu and click on Paste or click  on the toolbar.
- Click on  once you are happy with the contents of your contact note.

## USING SPELL CHECKER

When you double click on the Head Line or Note Detail field, the Enhanced Editor window will appear and you will see a  button.

- Click on .
- Any words not recognised by the spell checker will appear in red coloured text and you will be able to select alternative spellings from the list of suggestions or choose to ignore.





- You can manually change the word by clicking in the Not in Dictionary box and amending it as appropriate then clicking on **Change**.

*Note: we recommend that you do not use the Add to Dictionary or AutoCorrect options. The next time you log in, Swift will not remember you have added to the dictionary or auto corrected a word and the word will be highlighted as an error the next time you use the spell checker.*

## CHANGING THE FONT SIZE

When you open the Enhanced Editor window you can change the font size of the text displayed.

The current font size will be displayed and this can be changed by entering a new font size in this field:



If you place a tick in the Remember font size checkbox, Swift will always show the text in the font size you have selected.

## COMPLETING A CONTACT NOTE QUESTIONNAIRE

Certain contact note types may require additional information to be recorded. This information is entered on a Questionnaire screen attached to specific contact note types. One example of this is the contact note type **Falls Tinetti Balance Assessment (record results in further details)** where results of the assessment need to be entered onto Swift.

*Note: the note type will be labelled with the words "further details" to indicate that a questionnaire needs to be completed.*

- Enter the relevant contact note.
- Once you have saved the note, click on **Further Details**.

## Swift - Contact Notes - Copying a Contact Note to a Related Person's Record

What is displayed on the screen will depend upon the contact note type you entered; however the screen will look very similar to the following screen:

The screenshot shows a window titled 'Swift - W2K5WIFT - Remote Desktop' with a sub-window 'ATRN (gdollin) - Swift'. The main window is titled 'Person Profile Notes Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb...'. The 'Person's Details' section shows: Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb...; Key Responsibility: Gwen Dollin, Alnwick Intake/Unique Care Team - KEY WORKER, Alnwick Intake/Un...; Visit Type/Date: Falls Tinetti Balance Assessment (record results in further details) 12-APR-2007. The 'Questionnaire' tab is active, showing a heading 'Score: Normal=2 Adaptive=1 Abnormal=0' and a 'Total Score' field. Below is a table with columns: Code, Question, List Answer, Answer, and Score.

Code	Question	List Answer	Answer	Score
10	Sitting balance	T		
20	Arising from chair	T		
30	Immediate standing balance	T		

The lower half of the screen will display a list of questions and the answer to these questions must be input into the List Answer field, the Answer field or the Score field, depending upon the question.

- If the column after the Question field displays L, select the relevant answer from the list provided in the List Answer box.
- If the column after the Question field displays T, you will need to type your answer in the Answer field.

*Note:* depending upon the question you may need to enter information in both the List Answer and Answer fields.

- If the heading or the question indicate a score should be recorded, enter the number into the Score field.
- Once you have answered all of the relevant questions, click on Save.

*Note:* if you have recorded scores the Total Score will be displayed.

*Note:* the questionnaire can be updated at any time; therefore if you need to add an answer at a later date you can return to the relevant questionnaire and update it.

- Click on **Notes** to return to the Notes screen.

## COPYING A CONTACT NOTE TO A RELATED PERSON'S RECORD

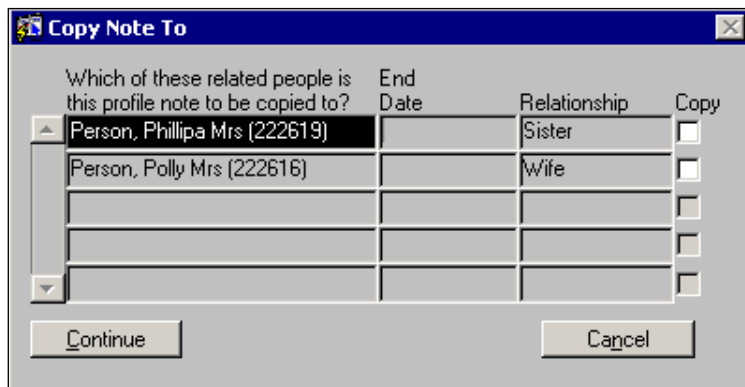
There is the facility in Swift to copy an existing Contact Note to other related persons of the client, provided they are recorded on the client's Relationships screen.

*Note:* you must ensure that the note detail has been worded so that it is relevant to each person it is to be copied against.


- Record and save the contact note on the client's record.

- Click on .

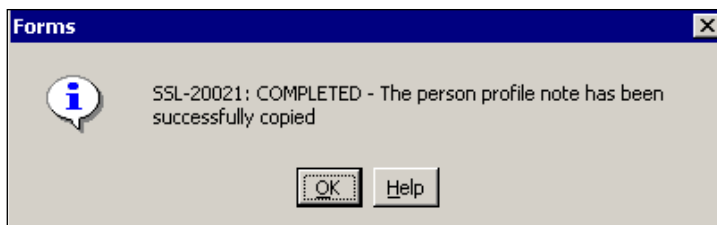
*The following screen will be displayed showing a list of related persons recorded against the client*

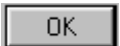


*The list will only show people who are recorded on the client's Relationship screen.*

- Place a tick in the Copy box against the person whose record you wish to copy the contact note to.
- Click on .

*The following message will be displayed confirming that the contact note has been copied:*



- Click on .

*Note: when a contact note is copied it is automatically saved in the related person's record and you cannot amend the details. If you later contact Systems Support to arrange for any amendments to this contact note you will need to make it clear whether both records need to be updated as any changes are not automatically reflected in the related person's record.*


## VIEWING CONTACT NOTES

A client may have many contact notes entered on Swift and on accessing Contact Notes you will see a list of all contact notes entered in the Note Date/Type field. The notes will be displayed in datal order, with the most current note being at the top.

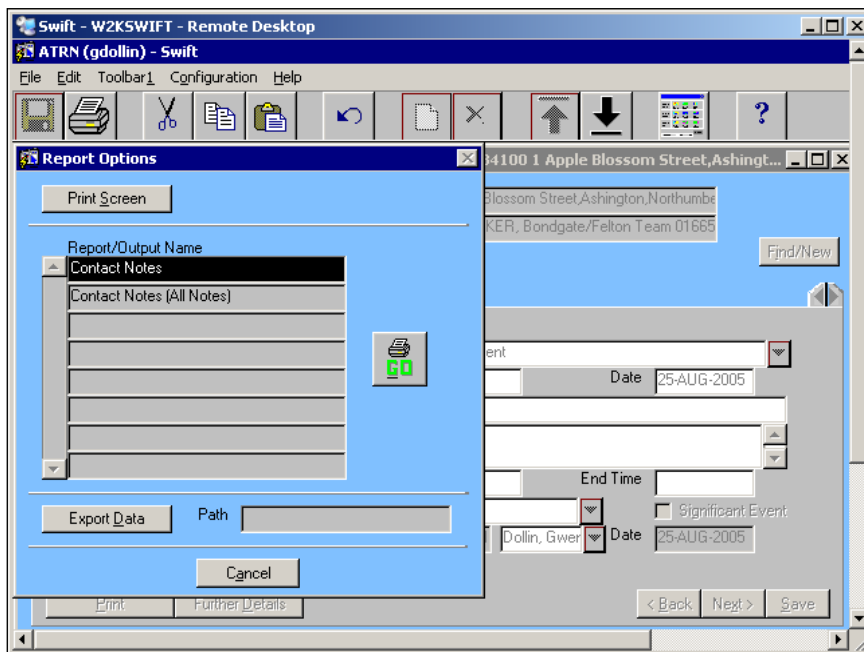
- Click on any contact note listed in the Note Date/Type Summary list and the contact note detail will appear on the right of the screen.
- To view a note which does not display in the Note Date/Type Summary list, use the scroll bar to the left of this field to move down the list.


## PRINTING CONTACT NOTES

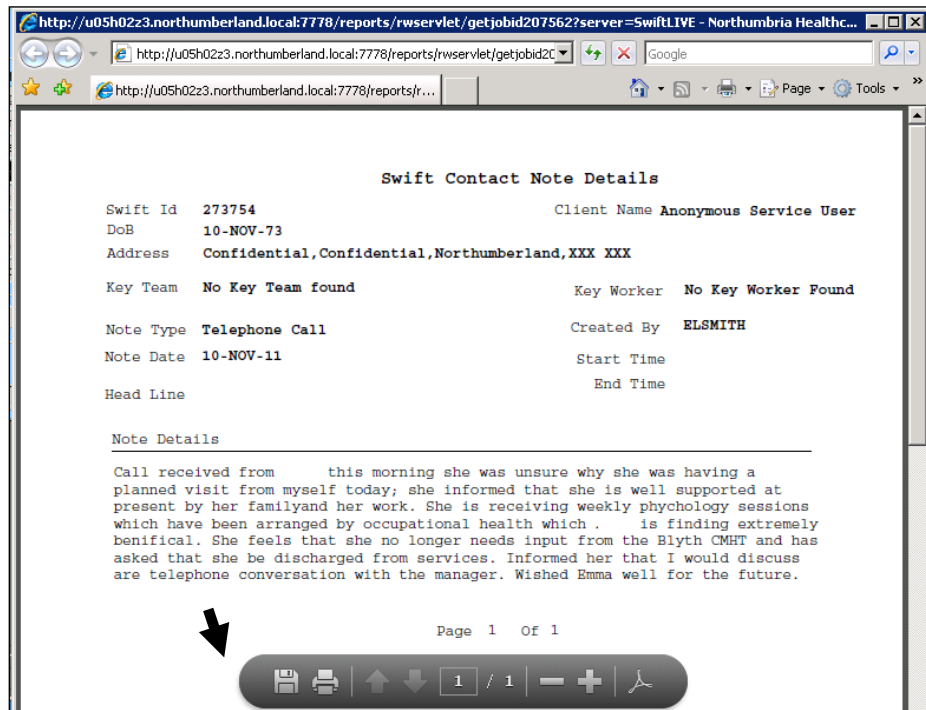
There is a facility for you to print from Swift a single contact note or all contact notes for client.

- If you wish to print only one note, click on that note in the Note Date/Type summary list. If you wish to print all contact notes, click on any contact note in the summary list.
- Click on .

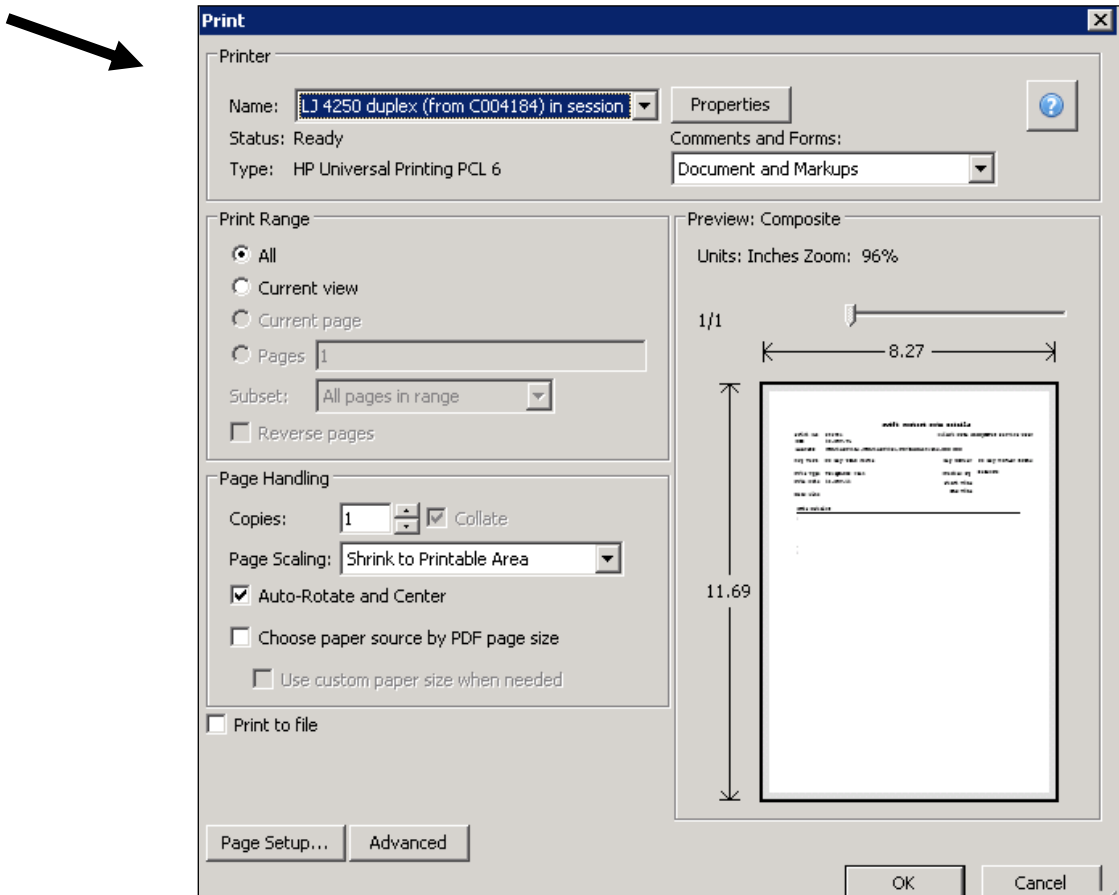
The following screen will be displayed:

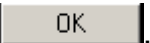


- In the Report/Output Name box click on either Contact Notes, to print out the contact note you have selected, or Contact Notes (All Notes) to print out all contact notes.
- Click on . (A Swift report will display showing the contact note you have selected.)
- The report you have selected may have a 'floating toolbar' at the bottom of the page [see below] in which case you would select the printer icon as shown.




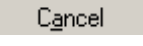


- The screen below will then display




- Ensure the correct printer is in the printer name box.
- Click on 

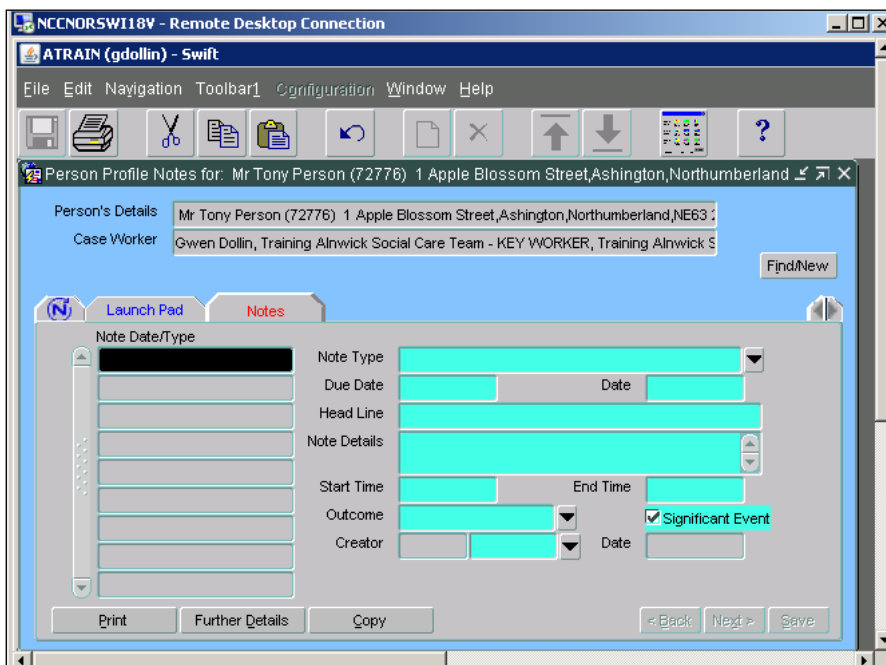
## Swift - Contact Notes - Searching for Contact Notes

- Click on  which appears on the top left of the report.
- A Print window will appear and you need to click on .
- Once the report has printed you can close the report down by clicking on .
- The report will close but will leave a minimised window at the bottom left corner called Reports Background Engine. This can be left open until you close Swift (if it is left open it makes it quicker to print subsequent contact notes).
- You will need to click on  on the Report Options window to return to the Contact Notes screen.

## SEARCHING FOR CONTACT NOTES

### Searching on Swift by Contact Note Type for example searching for CHC contact notes

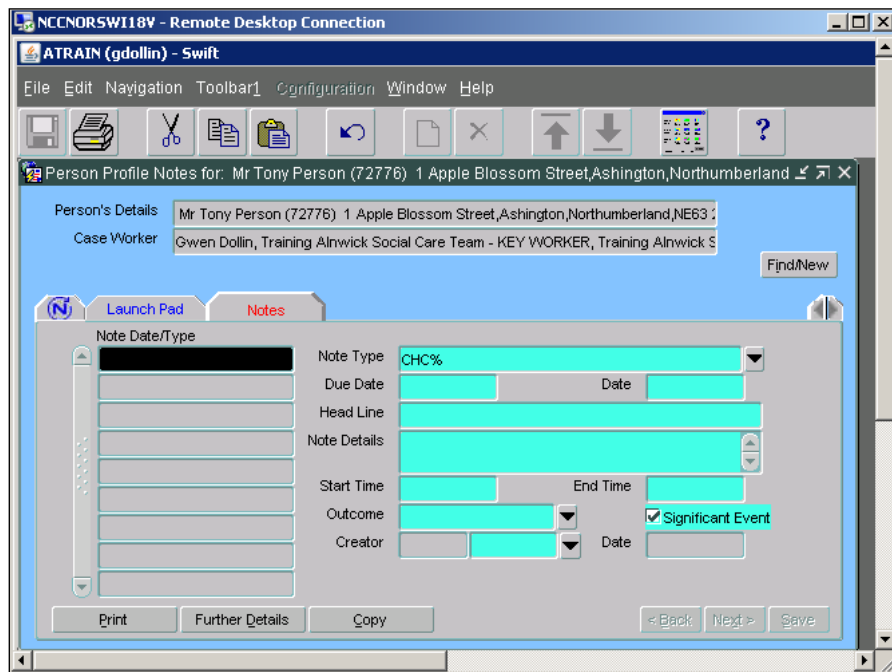
Press  on your keyboard, this will hide the contact note information and the screen will turn turquoise as below.



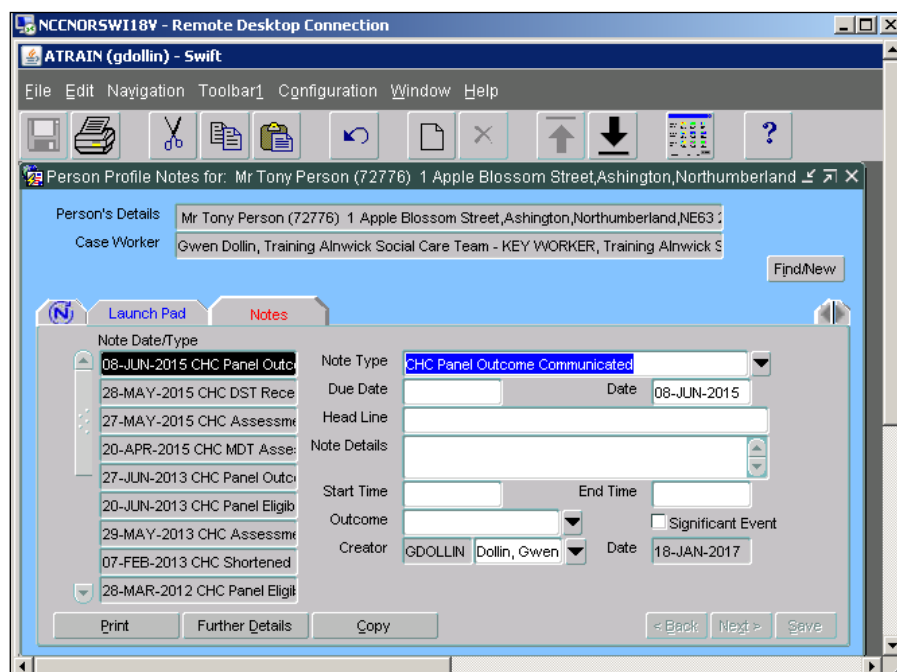
- You can now search on the note type field as it is highlighted in turquoise.
- In the note type field, select the information you wish to search on from a drop down list or by typing what you wish to search for in the field.

*Note:* searches are case sensitive so you must enter the text exactly the way it has been recorded in Swift using a wild card (%) where you are uncertain of the spelling or exactly how the text has been recorded. Where possible it is advisable to select the search criteria from a drop down list.

- For example if you are searching for CHC notes in the note type field type in **CHC%** as below.



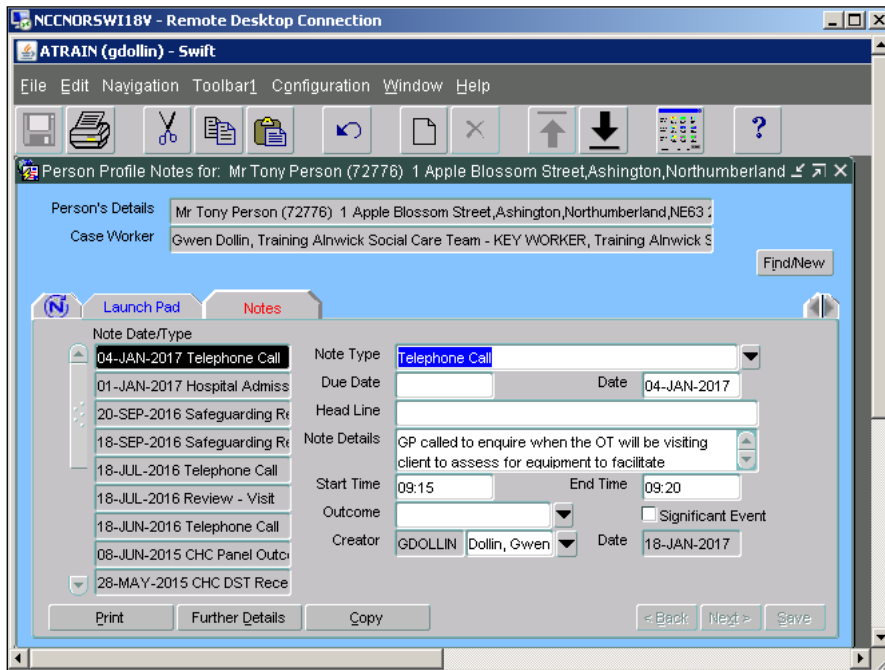
- Once you have the search criteria entered, press **F8** to carry out the search.
- A summary list will be displayed on the left of the screen showing only the items that match the criteria you have entered as below.



*Note:* if no list appears either the information has caused the search to fail or the information you are looking for is not in Swift. A message will be displayed at the bottom of the screen **"Query caused no records to be retrieved. Re-enter"**. Amend the criteria and press **F8** again.

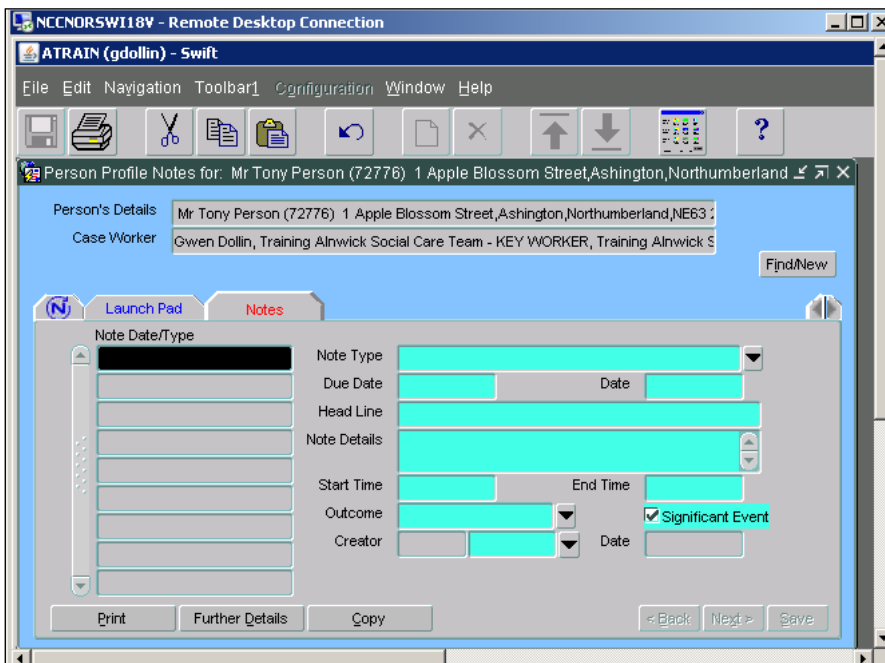
- If you wish to return to the full summary list, press **F8** again as below.

## Swift - Contact Notes - Searching for Contact Notes



## Searching on Swift by Date for example searching for all contact notes recorded during a certain month

Press **F7** on your keyboard, this will hide the contact note information and the screen will turn turquoise as below.

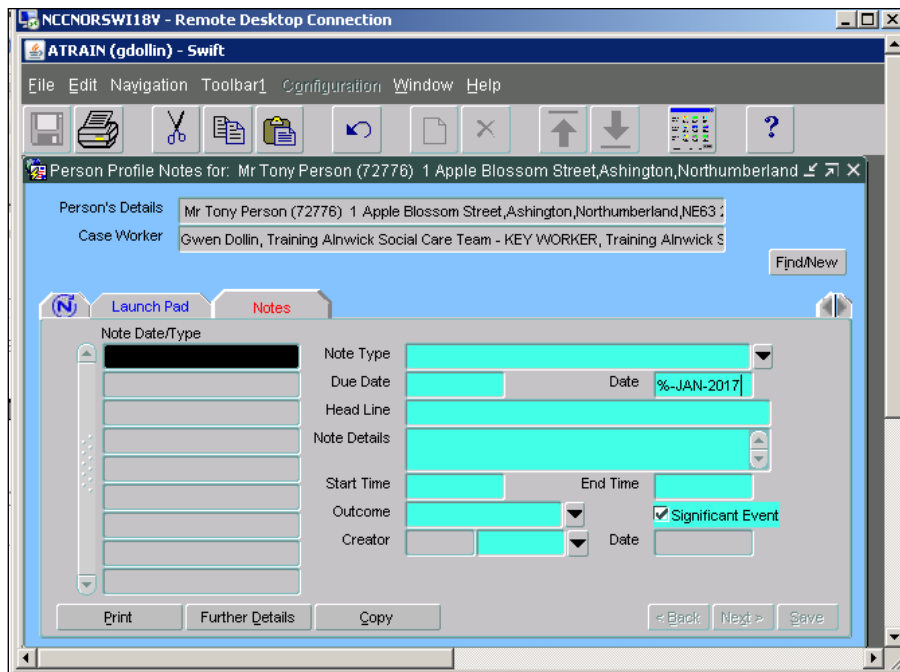


- You can now search on the date field as it is highlighted in turquoise.

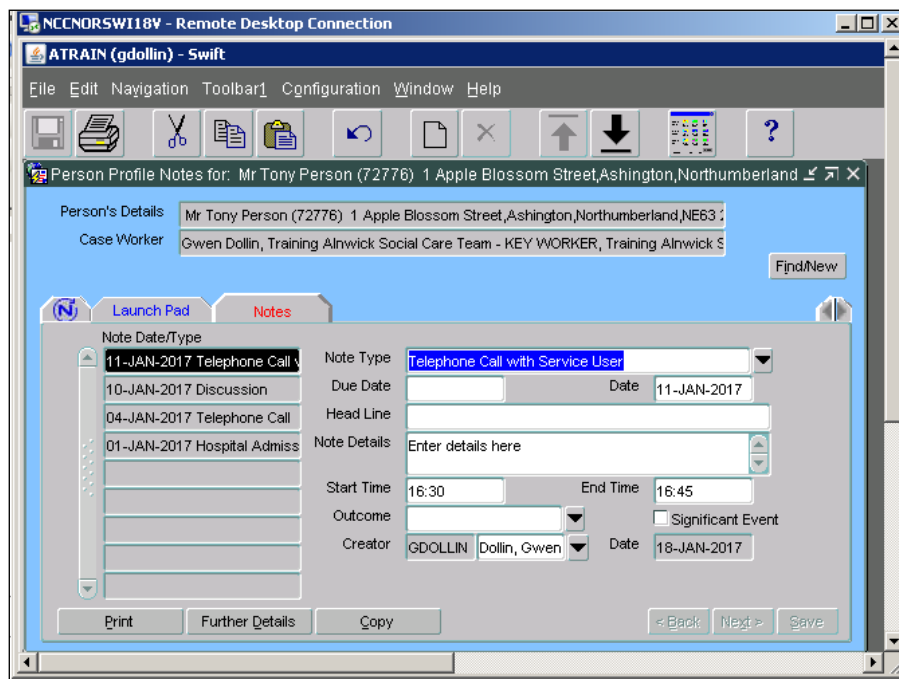
*Note: When using date fields to carry out a search you need to enter the date in the following format; dd followed by a hyphen (-) the first three letters of month followed by a hyphen (-) and then the full year, for example 07-JUN-2001, 07-APR-2016. To search for an approximate date the wildcard (%) can be used in place of the day, the month or the year.*



- For example if you are searching for notes entered in January 2017 in the date field type in **%-JAN-2017** as below.



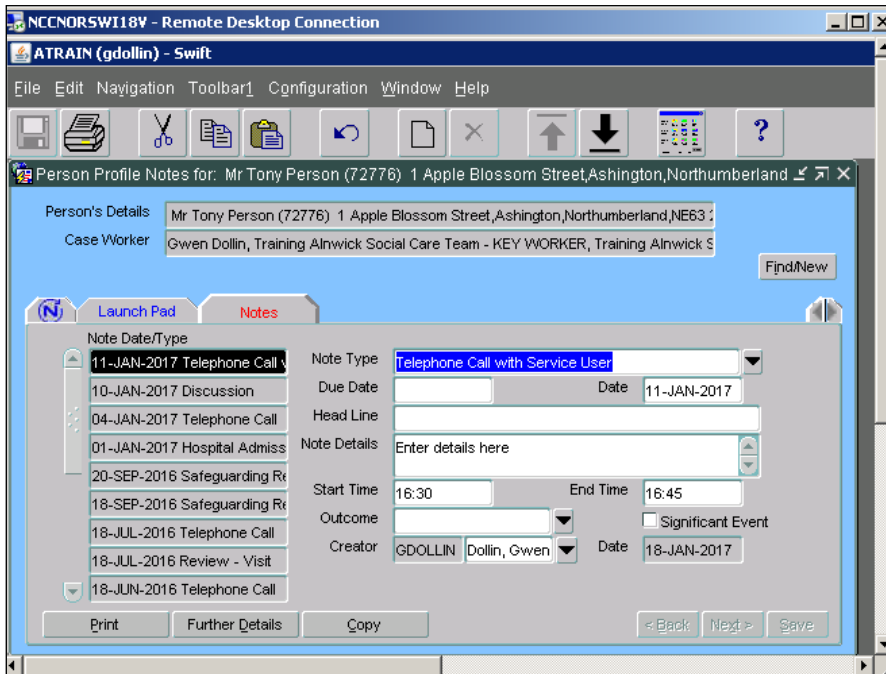
- Once you have the search criteria entered, press **F8** to carry out the search.
- A summary list will be displayed on the left of the screen showing only the items that match the criteria you have entered as below.



**Note:** if no list appears either the information has caused the search to fail or the information you are looking for is not in Swift. A message will be displayed at the bottom of the screen **"Query caused no records to be retrieved. Re-enter"**. Amend the criteria and press

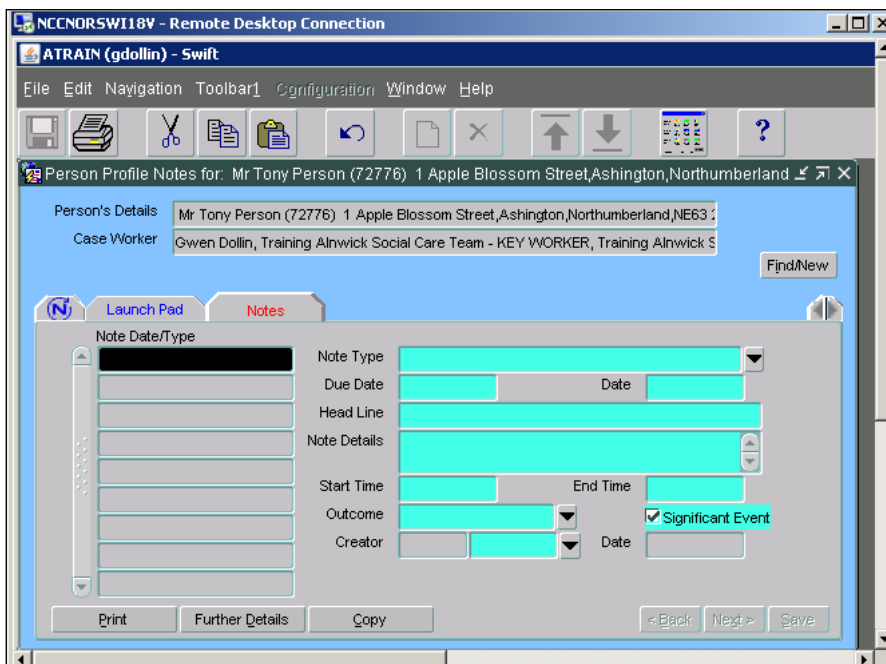
**F8** again.

- If you wish to return to the full summary list, press **F8** again as below.



## Searching on Swift by using Contact Note Headline for example searching for specific keywords in the head line field

Press **F7** on your keyboard, this will hide the contact note information and the screen will turn turquoise as below.



- You can now search on the head line field as it is highlighted in turquoise.
- In the head line field, enter the information you wish to search on

*Note:* searches are case sensitive so you must enter the text exactly the way it has been recorded in Swift using a wild card (%) where you are uncertain of the spelling or exactly how the text has been recorded.

- For example if you are searching for OT notes in the head line field type in **OT%** as below.

The screenshot shows the Swift software interface for a person's profile notes. The window title is "ATRAIN (gdollin) - Swift". The menu bar includes "File", "Edit", "Navigation", "Toolbar1", "Configuration", "Window", and "Help". The toolbar contains icons for file operations and navigation. The main area displays "Person Profile Notes for: Mr Tony Person (72776) 1 Apple Blossom Street, Ashington, Northumberland, NE63 3". Below this, there are fields for "Person's Details" and "Case Worker". The "Notes" tab is active, showing a list of notes on the left and a form for editing a note on the right. The form fields include: "Note Date/Type", "Note Type" (dropdown), "Due Date" (date field), "Head Line" (text field containing "OT%"), "Note Details" (text area), "Start Time" (time field), "End Time" (time field), "Outcome" (dropdown), "Significant Event" (checkbox), and "Creator" (dropdown). Buttons at the bottom include "Print", "Further Details", "Copy", "< Back", "Next >", and "Save".

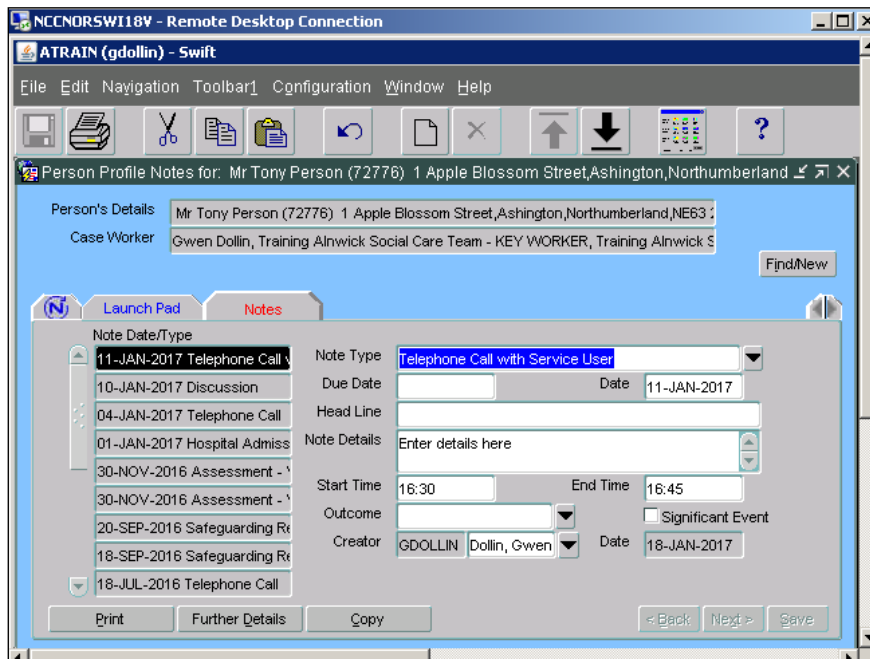
- Once you have the search criteria entered, press **F8** to carry out the search.
- A summary list will be displayed on the left of the screen showing only the items that match the criteria you have entered as below.

The screenshot shows the Swift software interface after a search. The window title is "NCCNOR5WI18V - Remote Desktop Connection". The menu bar and toolbar are the same as in the previous screenshot. The main area displays the same person's profile. The "Notes" tab is active, and the list of notes on the left now shows several entries: "30-NOV-2016 Assessment -", "30-NOV-2016 Assessment -", "29-JUL-2015 Email", "24-JUL-2015 Visited Client", "11-JUN-2015 Visited Client", and "21-MAY-2015 Telephone Call". The form on the right shows the details for the selected note: "Note Type" is "Assessment - Visit", "Due Date" is "30-NOV-2016", "Head Line" is "OT Assessment", "Note Details" is "Location and present -Visit at clients home,", "Start Time" is "13:30", "End Time" is "15:00", "Outcome" is a dropdown, "Significant Event" is a checkbox, "Creator" is "TWALES Wales, Tracy", and "Date" is "18-JAN-2017". Buttons at the bottom include "Print", "Further Details", "Copy", "< Back", "Next >", and "Save".

*Note:* if no list appears either the information has caused the search to fail or the information you are looking for is not in Swift. A message will be displayed at the bottom of the screen **"Query caused no**

*records to be retrieved. Re-enter". Amend the criteria and press **F8** again.*

- If you wish to return to the full summary list, press **F8** again as below.



## AMENDING CONTACT NOTES

Security has been set up so that you cannot amend contact notes. If you have made an error and wish to have it corrected please contact the Systems Support Help Line on (01670) 622450.

## DELETING CONTACT NOTES

Security has been set up so that you cannot delete contact notes. If you wish to have a contact note deleted please contact the Systems Support Help Line on (01670) 622450.