



## CRIB SHEET – CASE FRONTSHEET

The Case Frontsheet report provides a summary of basic information held on Swift about a client. Information such as relative/carer details, current professional involvements, current services and the cost of those services appear on the report.

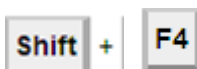
## RETRIEVING A REPORT




- Access  or  via the Launch Pad where the report is available and find the relevant person.

- Click on .


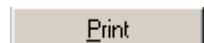
*Note: information from a previous search may have been retained on the Search Criteria screen and will need to be cleared before beginning your search. If you do not clear all the fields, the search may be unsuccessful.*

- To clear all fields press 
- Click into the relevant field(s) and enter the search criteria:

*Note: where you are unsure of a spelling or an actual name you can use a facility called the wildcard. The wildcard in Swift allows you to search for an unknown character or characters and is represented by a percent sign %. The wildcard represents any character and any number of characters. Therefore if you needed to find Catherine McDonald's details you could enter the following in the search criteria: Surname: M%cd%, Forename %ath% This would pick up all the variations of the spellings which could have been used: McDonald, Macdonald, McDonnell, MacDonnell etc, Catherine, Cathy, Cath, Katherine, Kath, Kathy.*

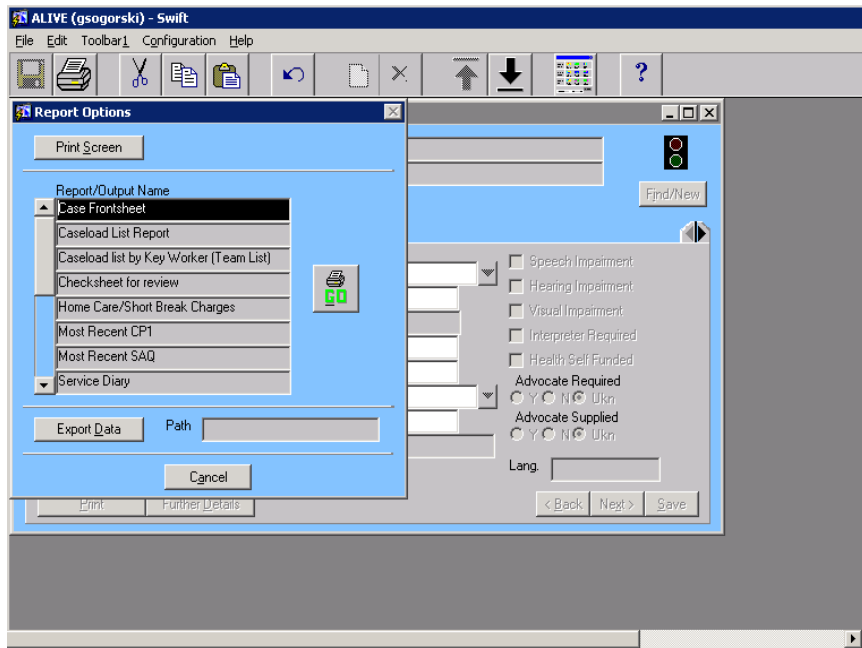
- Once you have entered the search criteria click on .


Once the search has been carried out the Person Search Results screen will appear.

- Once the person is found, click on the person's name in the list to select them and click on .
- Click on .



The Report Options screen will be displayed with a list of the reports available from this Swift screen:

- Click on the Case Frontsheet report in the Report/Output Name summary list.



- Click on .
- Now that you have retrieved a report you can print it or close it.

## PRINTING A REPORT

- Retrieve the report and have it displayed on screen.
- To print the report, depending on the type of report you have selected, you need to use one of the following options:
  - Click on  or  which is on the top left of the report.
  - Click on **File** and **Print...**
  - Click on **File** and then click on either **Print and close** or **Close without printing**.