

CRIB SHEET - CLOSING A CASE

To close a case on Swift, information on several Swift screens and modules may need to be closed depending upon the reason for case closure. It is essential that all relevant areas of the client record are closed to ensure that the case is closed correctly.

It is important to check to see if there is a current Safeguarding Referral and, any Draft CSP1's before the case is closed and you may need a discussion with the Team Manager before proceeding with closing the case.

This crib sheet covers what should be closed on Swift when the involvement of all teams and professionals is to end. Where a team or professional is to remain open contact the Systems Help Line for advice.


Note: to close a case where the client has died please refer to Crib Sheet – Closing a Case Due to Death of Client for guidance.

- You **must** close off all relevant details in Swift:
 - Referral
 - Hazards
 - Category (e.g. Employment Status)
 - Paper File Location
 - Costed Packages of Care
 - Draft CSP1's against Assessments or Reviews (if appropriate)
 - Future Reviews
 - Current Safeguarding Cases (if appropriate)
 - Blue Badge (if appropriate)
 - Registrations (if appropriate)
 - Legal Status
 - Involvements (must be ended last)

Ending the Referral

- Click on  (Referrals).

Note: the referrals screen may have a number of referrals displayed in the summary list, though only the top one should be open i.e. have no Closed Date recorded.

- In the Contact & Referral Dates summary list, click on the referral that needs to be closed.
- Click in Closed Date field and enter the date.
- Enter the appropriate reason in the Close Reason field.
- Click on .

The following screen will be displayed:

Ending Hazards

If the hazard remains relevant, even though the case is closing, do not enter an end date. Refer to your Team Manager for advice about whether a hazard should be closed or whether it should remain open.

If the Team Manager decides that the hazard should be closed then complete as follows:

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **Hazs.** (Hazards).
- Enter the closure date in the End Date field for each hazard.
- Click on **Save**.

The following screen will be displayed:

Ending Category

Where the client has an employment status or any other category recorded in Category screen then these should be ended when the case is to be closed.

- Click on **Categ.** (Category).
- Enter the closure date in the End Date field.

The following screen will be displayed:

Ending Paper File Location

If the client has a paper file location record, this will need to be ended when the case is closed.

- Click on **P Files** (Paper File Location).
- Enter the closure date in the Closed field on all locations.
- Click on **Save**.

The following screen will be displayed:

The screenshot shows the ATRAIN (gdollin) - Swift software interface. The main window displays 'Frontsheet Further Details for Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, Northumbria'. The 'P Files' tab is active, showing a table with columns for Paper File ID & Location, File ID, Subject, or Loc. Text, Closed, Retention, Archived, Resp. Unit, Norm. Loc., Opened, Review, Destruction, and Notes. The 'Closed' field is highlighted with the date '23-MAY-2012'. Below the table, there are fields for Requested, By, Sent, Location, Loc. Text, and Returned. At the bottom, there is a 'Print' button and navigation buttons '< Back', 'Next >', and 'Save'. A status bar at the bottom indicates 'Record: 1/1' and '<OSC>'.

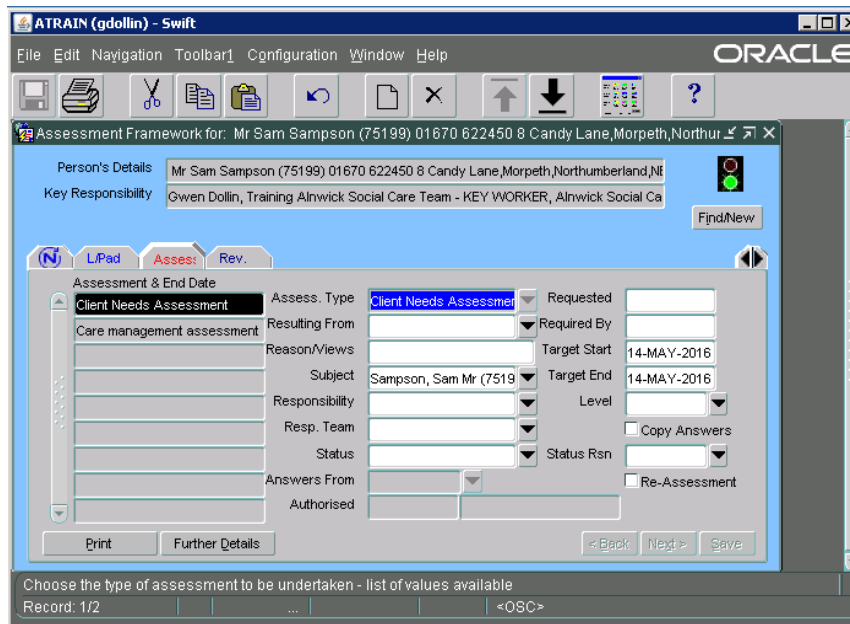
Draft CSP1's against the Assessment or Review

If the client has a draft CSP1 then this will need to be update before the case is closed, and may need a discussion with the Team Manager before proceeding with closing the case.

Complete one of the following actions, as appropriate:

- Finalise the CSP1 and send a copy to the service user.
- If the assessment was started but not completed e.g. due to death of the client, finalise the CSP1 by recording “an assessment/plan which was not completed” in the first question field on the CSP1.
- If the CSP1 was created in error, you will need to contact the Systems Support Help Line to have this removed send an email to SystemsHelpline <mailto:systemshelpline@northumbria-healthcare.nhs.uk>
- If the CSP1 is checked out, you must check this back into Swift in order to finalise it.

Note: You may need to add yourself as an involvement on the involvement screen to access the CSP1 don't forget to end your involvement on the involvement screen when you have finished.

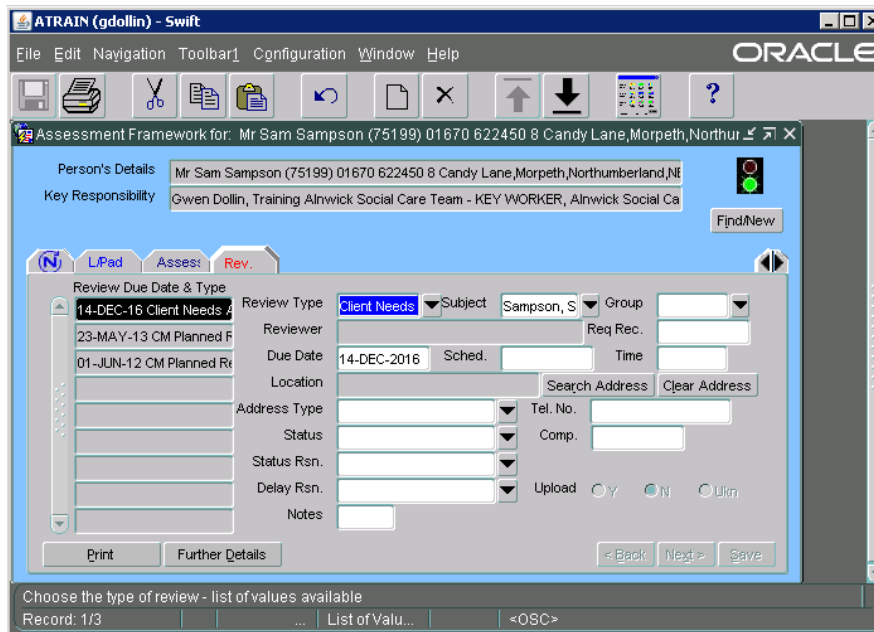


Deleting a Review

When a case is to be closed any future reviews that will no longer take place should be deleted.

Note: if the case closure is following a Care Management Review then completion of the review on Swift should be recorded as part of the review process.

- You will need to contact the Systems Support Help Line to have this review removed send an email to SystemsHelpline <mailto:systemshelpline@northumbria-healthcare.nhs.uk>



Current Safeguarding

It is important to check to see if there is a current Safeguarding Referral before the case is closed and may need a discussion with the Team Manager before proceeding with closing the case.

Note: You may need to add yourself as an involvement on the involvement screen to access the Safeguarding Episode Form don't forget to end your involvement on the involvement screen when you have finished.

Complete one of the following actions, as appropriate:

- If the case is closed and there are no further safeguarding issues, then please update the episode form with the relevant closure details and ensure the Current Status has been changed to Closed to Safeguarding.
- If the outcome is to proceed through Safeguarding Procedures then the case must be left open with a Care Management Referral and Key Team recorded until the Safeguarding Referral is ended.
- If the Client has died then the Care Management Referral and Key Team must be left open until the Safeguarding Referral has been closed.


The screenshot shows the ATRAIN (gdollin) - Swift software interface. The main window displays a 'Person Profile Notes' for Mr Sam Sampson. The 'Notes' tab is active, showing a list of notes on the left and a form for editing a note on the right. The note being edited is dated 03-MAR-2016 and has a type of 'Safeguarding Referral Form Update'. The form includes fields for Due Date, Head Line, Note Details, Start Time, End Time, Outcome, Creator (GDOLLIN, Dollin, Gwen), Date (14-JUN-2016), and a checkbox for Significant Event. Buttons for Print, Further Details, Copy, Back, Next, and Save are visible at the bottom.

Ending Blue Badge

Blue Badges are no longer maintained in Swift therefore when closing a case you can end the badge.

- From the main registrations screen, access the Car Badge – Persons screen.
The following screen will be displayed:

The screenshot shows the Oracle ATRAIN software interface. The main window title is 'ATRAIN (gdollin) - 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 displays 'Registrations for: Mr Sam Sampson (75199) 01670 622450 8 Candy Lane, Morpeth, Northumberland, N'. Below this, there are tabs for 'Registers' and 'Registrations'. The 'Registrations' tab is active, showing a list of registrations. The first registration is selected, showing details: 'Date Reg. & Status: 23-JAN-12 Current', 'Status: Current', 'Applic. Date: 22-JAN-2012', 'Date Registered: 23-JAN-2012', 'Reason Reg.', 'Date First Issued: 23-JAN-2012', 'Renewal Date: 23-JAN-2015', 'Elig. Date & Rsn: 23-JAN-2012 Mobility/higher di', 'Expiry Date: 22-JAN-2015', 'Date Ended', 'Reason Ended', 'Text', 'Notes', 'Temp. Badge'. At the bottom, there are buttons for 'Print', 'Further Details', '< Back', 'Next >', and 'Save'. The 'Save' button is highlighted.

- Change the status to 'De-registered'.
- Enter the closure date in the Date Ended field.
- Enter “~Closed for other reasons” in the Reason Ended field.
- Click on .

Ending Person's Registration

You must check whether any of the Person's Registrations should be closed or not. It is possible to close a case on Swift but leave the Person's Registrations open if it is still current and valid.

You should use the following guidance only where you are sure the Person's Registrations are to be closed.

- From the main registrations screen, access the registration you wish to end.
- To close the registration complete the following fields:

Status

Change to **De-registered**.

Date Ended

Enter the date the registration ended.


Reason Ended

Enter the reason the person's registration has ended.

- Click on .

Ending Legal Status



- Navigate to [Legal Profile](#) for the client.
- Click on the legal status you wish to end in the Start Date & Legal Status summary list.
- Enter the closure date in the End Date field.
- Enter Ended (CPA) in the End Reason field.
- Click on .

The following screen will be displayed:

The screenshot shows the 'Legal Status' form in the ATRAIN software. The form is titled 'Start Date & Legal Status' and contains the following fields:

- Start Date/ Time:** 22-DEC-2011
- Legal Status:** CPA Section 117 (aftercare)
- Reason:** Care Programme Approach
- End Date:** 23-MAY-2012
- End Reason:** Ended (CPA)

Other fields include 'Projected End Date', 'Court Responsible', 'Resp. Authority', and 'Care Authority', which are currently empty. The 'Main LS' checkbox is unchecked. The 'Notes' field is also empty. The form has a 'Print' button and navigation buttons '< Back', 'Next >', and 'Save'.

Ending Involvements

When a case is closing and the client has a current car badge or registration that will continue even though the case is closing, then the GP Practice must be left open. All other involvements need to be ended.

- Click on **Involv** (Involvements).

The following screen will be displayed:

The screenshot shows the 'Involv' tab in the software. The 'Person/Organisation' section is expanded to show 'Gpn Coquet Medical Group' with 'Start Date' set to '22-DEC-2011'. The 'Involvement' section shows 'Alnwick Long Term (Team)' and 'Organisation' as 'Gpn Coquet Medical Group (Gp Pract)'. The 'End Date' field is empty. The 'Key Worker' and 'Key Team' checkboxes are unchecked. The 'Involvement Role' table is empty. The 'Save' button is visible at the bottom right.

- Click on the first involvement that needs to be ended.
- If you are ending a key worker or key team involvement, you must remove the tick from the Key Worker/Key Team fields.
- Enter the closure date in the End Date field.
- Click on **Save**.

Note: any involvement role entered will be automatically ended.