


ACCESSING CONTACT NOTES



- Access  via Launch Pad.
- Search for the person you wish to record a contact note against.

Note: you may need to record yourself as an involvement in order to access contact notes in line with the Involvement Based Security procedure.

RECORDING A CONTACT NOTE

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



Double click in this 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 12 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 TEXT INTO NOTE DETAILS


If information that you wish to record in contact notes is available in an email or a Word document, you can copy this information and paste it into a 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, hold down the **Ctrl** key on your keyboard and press the letter **A** key or go to the Edit menu and click on Select All.*

- Once the information is highlighted, hold down the **Ctrl** key on your keyboard and press the letter **C** key or go to the Edit menu and click on

Copy or click  on the toolbar.

- Go to the client's contact note screen and press **F6** to enter a new note.
- Enter the Note Type and Date.
- Double click in the Note Detail field to open the Enhanced Editor window and hold down the **Ctrl** key on your keyboard and press the letter **V** key to paste the information into this field.
- If you wish to spell check the note, please follow the instruction given in the Using Spell Checker section of this guidance.
- Once you have entered the relevant detail in the Enhanced Editor window click on .



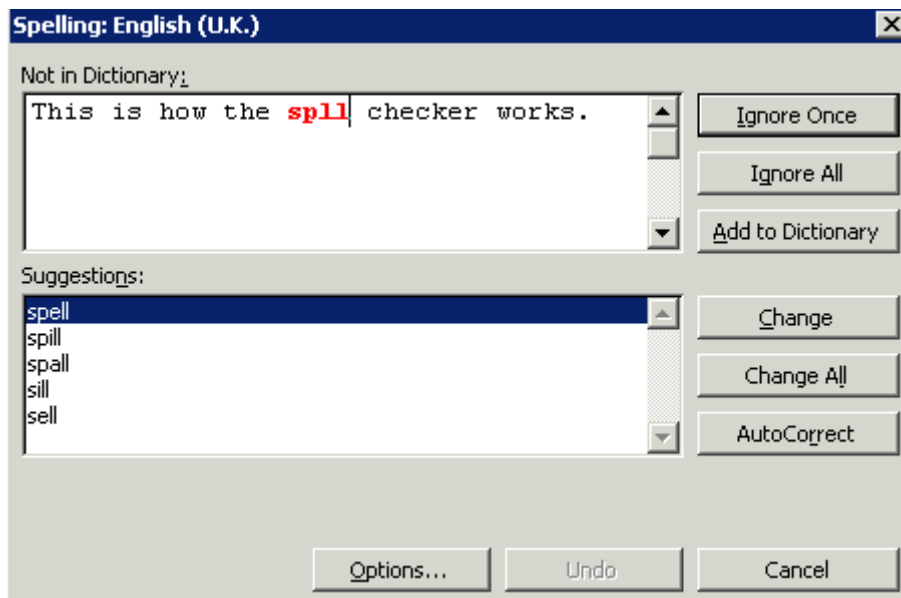
If you click on **Cancel** before you have clicked on **Ok** you will lose information entered in the Enhanced Editor window.

- Click on **Save** 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 **Check Spelling** button.

- Click on **Check Spelling**.
- 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.



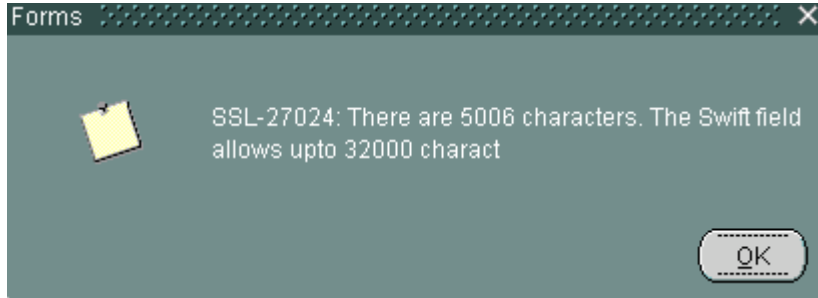
- You can manually change the word by clicking in the Not in Dictionary box and amending it as appropriate then clicking on **Change**.

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.

CHECKING NUMBER OF CHARACTERS ENTERED

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

You can use this button to check how many characters you have entered in a field. You will see the following message advising you of how many characters you have entered and what the character limit is.



If there are more characters than the allowed limit you will need to reduce the number of characters before you can save the note.

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.

AMENDING/DELETING CONTACT NOTES

You will need to contact the Systems Help Line to amend or delete a contact note that has been saved.