




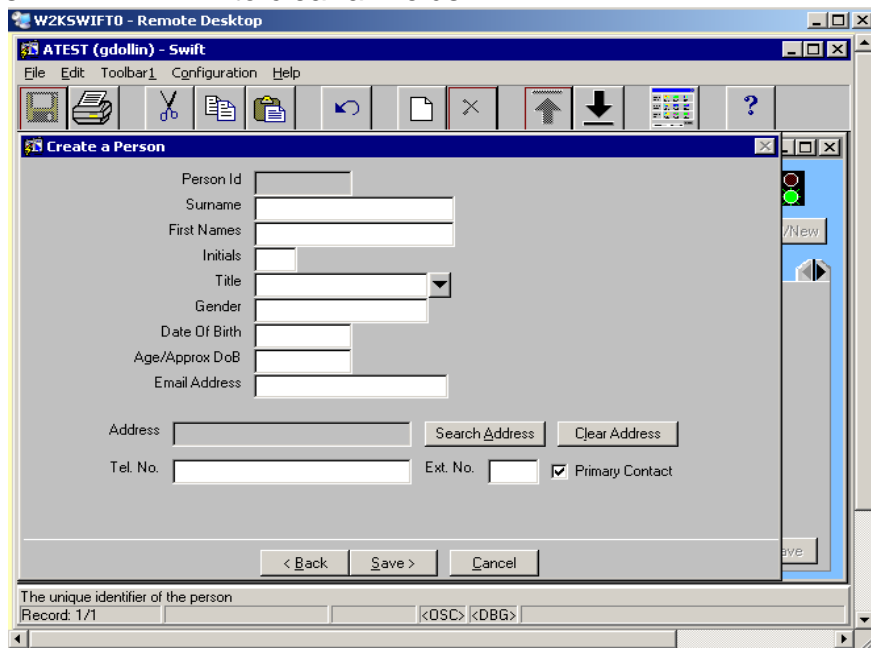
CRIB SHEET – CREATING A PERSON

These instructions should only be used to create a client or a relative or carer of a client. If you require a worker to be created on Swift you must ring the Systems Support Help Line on (01670) 622 450 to request the worker to be set up on Swift.

After carrying out a person search a list of those people who meet the criteria is displayed, but you may not always find the person you need. If this is the case, the person will need to be created on Swift.

Note: when you do not find the person always search again using different criteria. For example if you cannot find the person searching by name search again by address if you have the information. It is important you make thorough searches before deciding to create a person so that you avoid creating duplicates on Swift.

- Once a thorough search using different search criteria has been carried out and the person is not found, click  on the Person Search Results screen.
- The Create a Person screen will be displayed and may contain some of the search criteria you entered.
- Press  and  to clear all fields.



The screenshot shows a remote desktop window titled 'W2K5WIFT0 - Remote Desktop'. Inside, there is a window titled 'ATEST (gdollin) - Swift' with a menu bar (File, Edit, Toolbar1, Configuration, Help) and a toolbar. The main window is 'Create a Person' and contains the following fields and controls:

- Person Id:
- Surname:
- First Names:
- Initials:
- Title:
- Gender:
- Date Of Birth:
- Age/Approx DoB:
- Email Address:
- Address:
- Tel. No.: Ext. No.: Primary Contact

At the bottom of the form are buttons: . A status bar at the bottom indicates 'The unique identifier of the person' and 'Record: 1/1'.

- Complete the following fields:

Surname

Enter the person's surname.

First Names

Enter the person's preferred first name(s).

Note: all other names the person is known by should be entered on the Other Names screen. Refer to Frontdesk – Other Names section of this manual.

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Initials

No input necessary as this is automatically updated from the First Names field.

Title

Enter the person's title.

Gender

This may automatically update from the Title field. If not, enter the appropriate gender.



If you type **M** or **F** and press tab the field will automatically be completed with Male/Female.

Date of Birth

Enter the date the person was born. If the date of birth is not known, leave this field blank at this stage and use the Age/Approx DoB field instead, though the date of birth must be entered once it is known.

Note: never type in a bogus date of birth e.g. 01/01/01 because it will appear to be a valid date of birth. If you do not know the person's actual date of birth enter an approximate date of birth in the Age/Approx DoB.

Age/Approx DoB

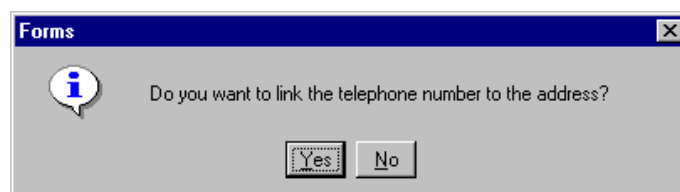
Enter the person's approximate DoB if the person's actual date of birth is not known.


- Click on and enter the address. Refer to *Frontdesk – Finding an Address* section of this manual.

Note: if you cannot find the address, return to the Create a Person screen and continue without the address entered. Contact a member of admin in your office who can create addresses and inform them of the person's name or Swift ID, the address you are wanting to add to the person's record and the home telephone number of the person. Admin will create the address and add this to the person's record.

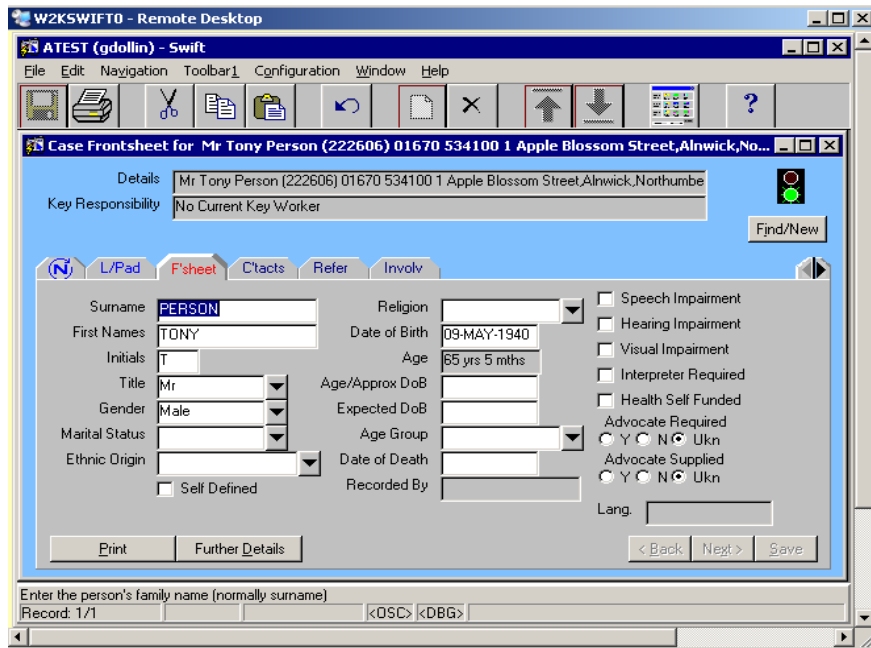
- Once the address search has been completed the Create a Person screen will be displayed with the address selected displayed in the address field. If you clicked on the wrong address and an incorrect address is displayed you can click on and then go through the process of searching for an address again.
- Enter the person's telephone number in the **Tel. No.** field.
- Once all the details are completed, click on .

The following message will be displayed if you have recorded an address and telephone number:



- Click on .

The person's details will be saved and the Frontsheet screen will be displayed, with the Person's Details in the header on the top of the screen and Key Responsibility reading "No Current Key Worker".




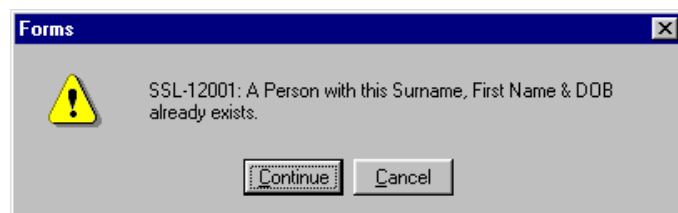
At this stage you have recorded basic information about a person. At a later date you may obtain further personal details about the person and this information can be added to the person's record. Refer to *Frontdesk – Frontsheet* section of this manual for instruction on recording this type of information.

Note: it is a common mistake for a person to be created on Swift without an address. It is easy to identify where this has happened as the Header details will only display the person's name. Where this has occurred refer to Frontdesk – Addresses and Telephone Numbers section of this manual for instruction on recording an address against an existing person on Swift.


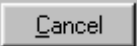
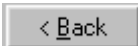
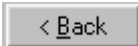
Duplicate Records

It is important that you carry out a thorough search of Swift before you begin to record a person to avoid the creation of duplicate records.

- Once you click  after you have entered the details on the Create a Person screen, if the person you are creating has the same Surname, First name and date of birth as another person on Swift the following message will appear as a warning:



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- If you are certain that you searched thoroughly before commencing creating a person then click on  to carry on with creating a person on Swift.
- If you are uncertain that you carried out a thorough enough search click on  to return you to the Create a Person screen. Click on  to return to the Person Search Results screen and click on  again to take you to the Person Search screen where you can carry out a thorough search to find the client.