

QUICK REFERENCE GUIDE

RECORDING SAFEGUARDING ADULT INFORMATION ON SWIFT

Safeguarding Contact Note Types

There are 5 different contact note types that can be used to record Safeguarding events on Swift:-

- ◇ **Safeguarding Adult Concern Notification** – to be used to record information which does not indicate progress to safeguarding procedures.
- ◇ **Safeguarding Adult Concern Notification Further Action** – this must be used by the Team Manager.
- ◇ **Safeguarding Referral** – to be used to record information which indicates progress to safeguarding procedures.
- ◇ **Safeguarding Referral Form Update** - to be used to record information which indicates progress through safeguarding procedures.
- ◇ **Safeguarding Manager Validation** – to be used to update/change the information recorded within the referral form.

How to record a Safeguarding Contact Note and Run the Safeguarding Episode Form

On the Contact Note screen, complete the following fields:

Note Type

Enter any Safeguarding contact note type of either:-

Safeguarding Referral

Safeguarding Referral Form Update

Safeguarding Manager Validation



*If you enter **Sa** and then press Tab you will be presented with a list of the Safeguarding contact note types.*

Date

Enter the appropriate date.

Headline

Enter a headline if necessary.

Note Details

Enter detail as necessary.

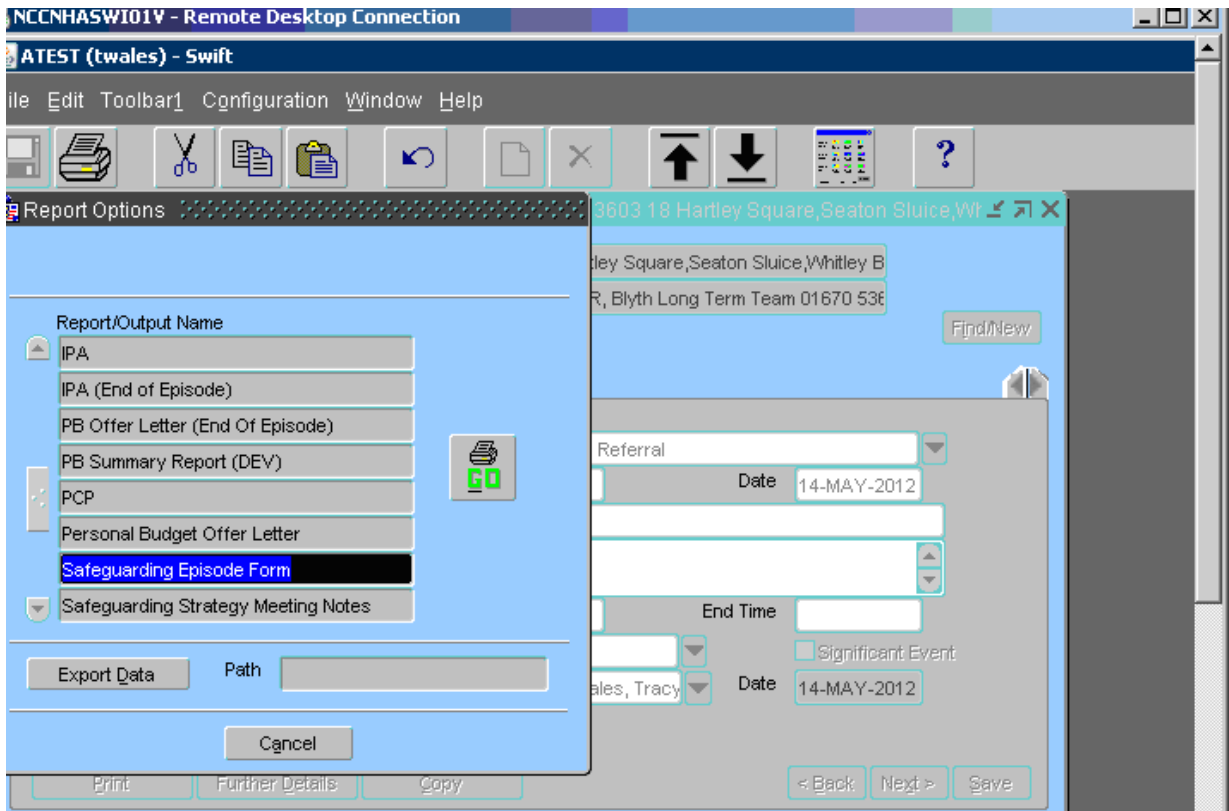
Start Time/End Time

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.


You **must** now 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 Safeguarding Episode Form you require in the Report/Output Name summary list.

- Click on  (The form will display on screen, though it may take a few seconds to appear on your screen).

COMPLETING THE SAFEGUARDING EPISODE FORM

Recording Details on Form

- ◇ There are different types of fields within the form where information is displayed or entered. A form could contain one or more of the following types of field:
- ◇ Fields populated by Swift – these cannot be updated on the form. You will need to update Swift and then retrieve the form to see the changes.

- ◇ Check Boxes – click in the box to add a tick or a cross, click in the box again if you want to remove the tick or cross.
- ◇ Drop down boxes – these are grey boxes containing words such as **Select Answer**. Click on the box to display the list to choose an answer.
- ◇ Text fields – these are free text fields which are not shaded, where you can enter an unlimited amount of information below within the field, for example:

Please Provide Details

Moving Around the Safeguarding Episode Form

- To move around the episode form you can use your mouse, your cursor keys and, in some places, your Tab key.
- If you choose to use your mouse click with your mouse in the appropriate text field before typing and always check that the text displays correctly before finalising your form.
- If you choose to use the downward arrow key on the keyboard you must ensure that your cursor appears in the area you want text to appear again checking that text displays correctly before finalising your form.
- Avoid using the tab key in text fields as some forms are set up in table format and using the tab key may insert an additional row in to the table which you would want to avoid.
- You can use Edit, Undo if you have made an error.
- As with any Word document, it is advisable to regularly save the form so that if there is a problem with your PC, the network or Swift you will not lose the information you have recorded.
- Click on .
- Click on .

Formatting Text

- Information entered into Text fields can be formatted using the Word formatting options such as bold, italic and underline and also bullets and numbering.
- The Word formatting options will appear on the Word toolbar and can also be accessed via the Format menu.

Note: you cannot format text entered in Form fill in fields.

Spell Checking Text

- You can use the Word spell check facility within the Safeguarding Episode form; however it will only spell check information entered into the Text fields. Any Form fill in fields or fields populated by Swift will not be spell checked. There is no spell check button to use on the toolbar, therefore to start the spell check:
- Ensure your cursor is in the first Text box field where information has been recorded.
- Click on the Tools menu and select Spelling and Grammar.

Note: if you start the spell checker with the cursor further down the document, the Text fields prior to that will not be checked.

Copying and Pasting Text in to Text Fields

- Information can be copied and pasted in to text fields using the Word facility e.g. Copy and Paste icons on the tool bar, CTRL and C (to copy) and CTRL and V (to paste) or via the Edit menu.

CLOSING AND SAVING FORMS

Regularly Saving a Form

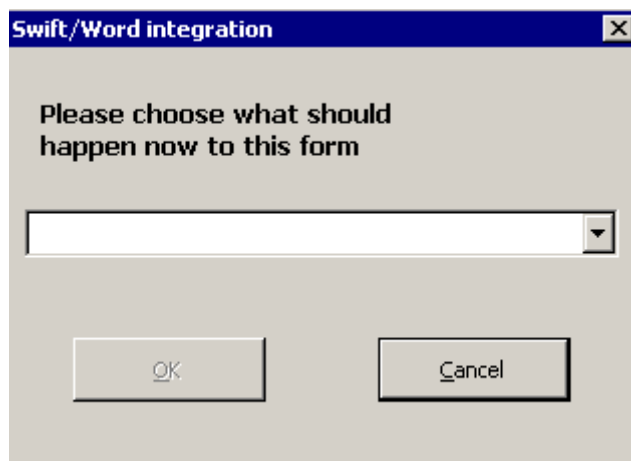
- As with any Word document, it is advisable to regularly save the form so that if there is a problem with your PC, the network or Swift you will not lose the information you have recorded.
- Click on .
- Click on .

Note: saving the form in this way will save it as a draft version but will leave it open on your screen.

Saving the Form as a Final Version

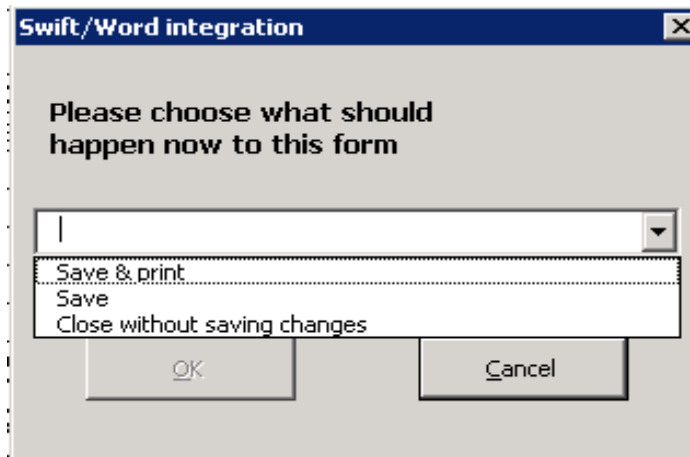
- Once a form is saved as a final version it cannot be amended, any further updates would need to be done through a new contact note type.
- Click on .
- Click on .

The following screen will be displayed:



- Click on the drop down box.

The following options will be displayed:



- Select appropriate option to Save the form.
- Click on .

The following screen will be displayed to let you know that the relevant emails have been prepared:



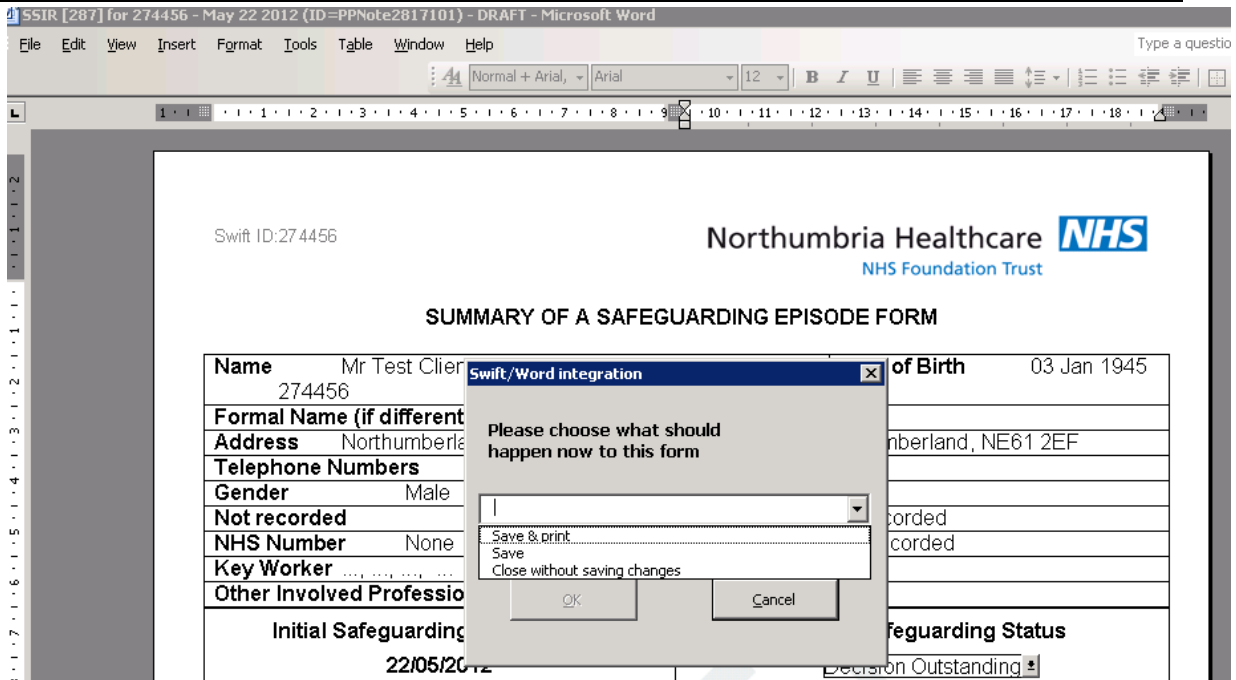
- Click on .
- The form will close, Word will be minimised at the bottom left of your screen and you will be returned to the Report Options screen.
- Click on to close the Report Options screen.
- Retrieve and send the emails.

! ***Now that you have saved a form as a final version and the relevant emails have been prepared you must retrieve and either send or delete them as necessary.***

Closing the Client Form without Saving Changes

- If you have recorded information on the form but do not wish to save the information you have entered, you can use this option to close it without saving the information you have entered.
- Click on .
- Click on .
- Click on the drop down box.

The following screen will be displayed:



- Click on **Close without saving changes**.
- Click on **OK**.
- The form will close, Word will be minimised at the bottom left of your screen and you will be returned to the Report Options screen.
- Click on **Cancel** to close the Report Options screen.

Note: if the reason you are closing the form without saving changes is because you do not want a form for this client, you must ring the Systems Support Help Line who will delete the file that has been automatically created in the relevant folder on the network.

EMAILING FORMS

Emailing Copies of the Form

- Once the form has been saved as a final version, Swift will automatically generate emails. The emails that are generated will be dependant on the type of form you have finalised.

Note: Swift can only generate the emails once the form has been saved as a final version.

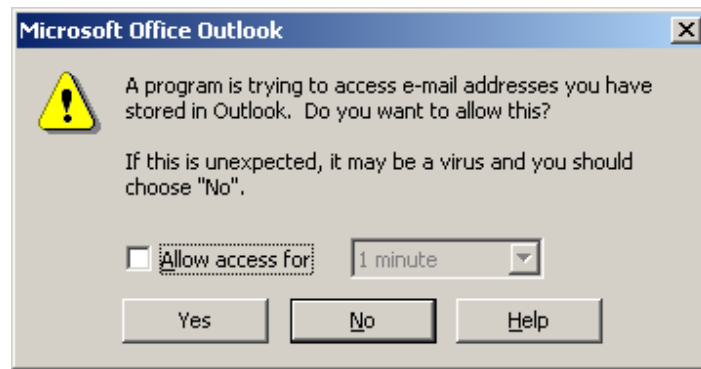
- Go to your desktop.



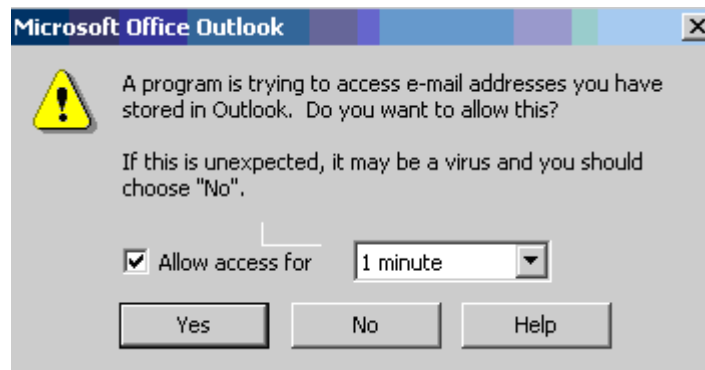
- Double click on the **SendSwiftForm** icon.

Note: if an error message is displayed at this point, you may need to open Outlook. It is very much dependent upon the set up of your PC as to whether you need Outlook open or not.

The following message will appear:



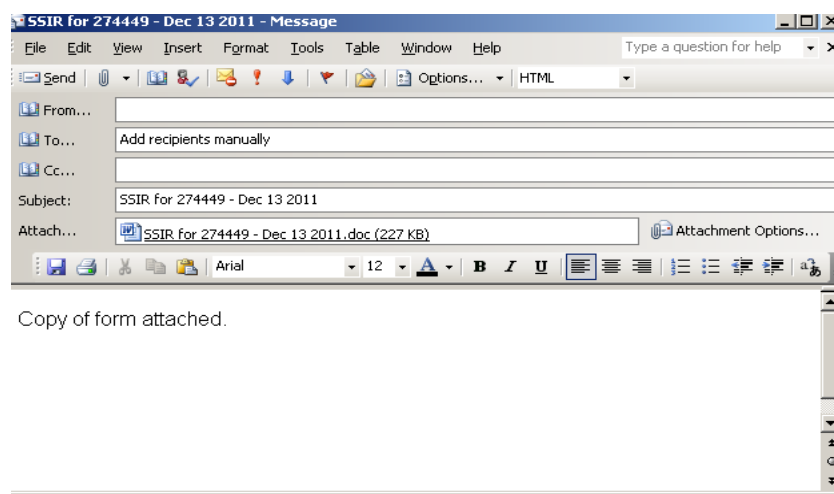
- Click on Allow access for: to insert a tick.



- Click on Yes
- The relevant emails will be generated.
- If the person's email address has automatically appeared in the email To box, the name of the attachment will include the email address of the person it is being sent to.


! *You must check that you wish to send the email to the recipient. Although Swift will generate the emails, there may be instances where you do not want to send the email.*

The following screen shows an example of the emails which will be generated:

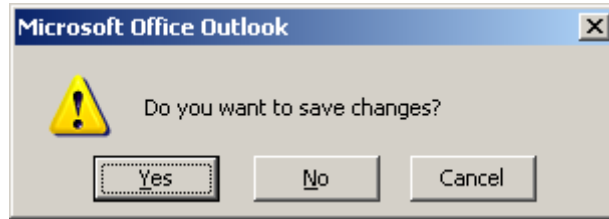


- You will now be able to send the emails. Some emails will already have the recipients email address entered; others may require you to enter the email address.
- Any emails you send will appear in your Outlook Sent Items folder.

Closing Emails without Sending Them

- If you do not wish to send an email:
- Click on  (Close) at the top right of the email.

The following message will be displayed:

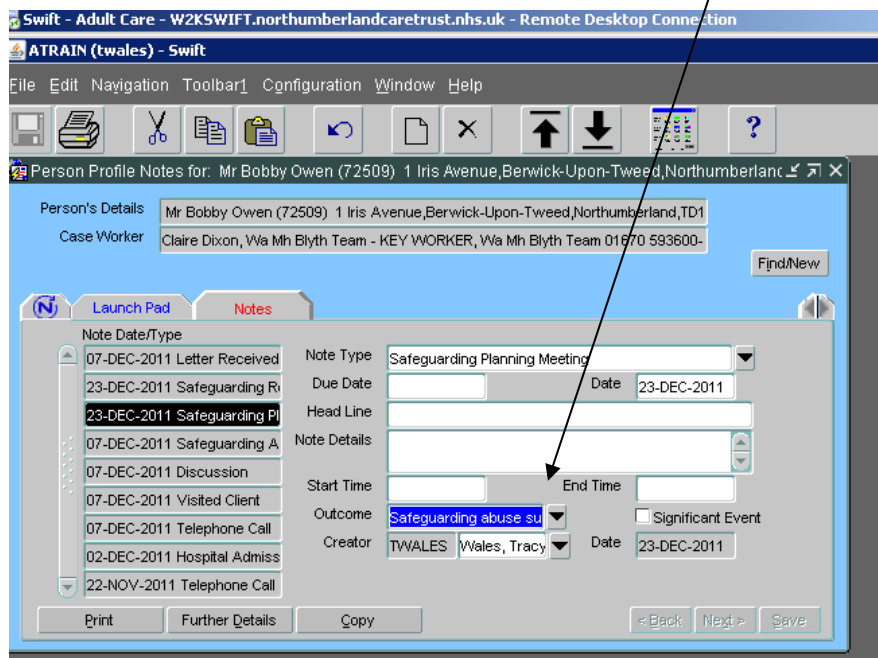


- Click on .

Note: if you close an email but then realise that you do need to send it you can generate another email with an attached form. Refer to Sending Additional Emails section of this manual.

Safeguarding Outcomes for Reviews

There is also the option to record an outcome against **any** Safeguarding Contact Note, this will trigger a workflow job to the Team Manager entitled **Safeguarding Review**:-



List of outcomes:-

- ◇ SA abuse not determined/ inconclusive - review in 1 month
- ◇ SA abuse not determined/ inconclusive - review in 3 months
- ◇ SA abuse not determined/ inconclusive - review in 6 months
- ◇ SA abuse not determined/ inconclusive - review in 12 months
- ◇ Safeguarding abuse substantiated - review in 1 month
- ◇ Safeguarding abuse substantiated - review in 3 months
- ◇ Safeguarding abuse substantiated - review in 6 months

- ◇ Safeguarding abuse substantiated - review in 12 months
 - When recording the Safeguarding contact note complete the following additional field:

Outcome

Enter the Safeguarding outcome.

The Team Manager will receive a workflow job entitled “Safeguarding Review”.

If no outcome is recorded this would indicate there is to be no further action, and a review is not necessary.

Workflow Jobs relating to Safeguarding

Team Manager - Safeguarding Decision Needed

When a Contact Note of type **Safeguarding Referral** is recorded on Swift a workflow job entitled **Safeguarding Decision Needed** will automatically go to the relevant Team Manager and also the Safeguarding Adults Officer.

Following this referral, once the decision is recorded on Swift, i.e. a Contact Note of type “**Safeguarding Referral Form Update**” the workflow job will automatically disappear.

Team Manager - Safeguarding Review Reminder

If a Safeguarding review is to take place (i.e. an outcome is recorded against any Safeguarding Contact Note) a workflow job entitled **Safeguarding Review** will automatically go to the relevant Team Manager.

The workflow job will remain on the Team Managers Launch Pad as a reminder until at a later date a Contact Note of type “**Safeguarding Review**” is recorded against the client, or until another outcome is recorded that supersedes the previous outcome.

Deputising

Team Managers may cover for each other in much the same way as for authorising provisions. If you are set up as a deputy for another Team Manager you will be able to access their workflow jobs relating to Safeguarding.

Handy Tip - Searching for Safeguarding Contacts Notes using F7/F8

It is possible to search in the list of all the contact notes for notes relating to Safeguarding.

From the Contact Note screen:-

- Press F7. (The screen will clear and go turquoise).
- In the Note Type field enter **Sa%**, or click on the drop down box and choose the relevant note type.
- Press F8.

You will now be presented with all the relevant Safeguarding contact notes.

- Press F8 again to display the full list of contact notes.

For more detail on this search facility refer to *Basic Use of Swift – Summary Lists – Searching for Information* section of the Swift manual.

Assistance

For further details on recording Contact Notes in Swift, please refer to the *Contact Notes – Recording a Contact Note* section of the Swift manual.

Please do not hesitate to contact the Systems Support Help Line on 01670 622450 for assistance.