

HOUSING OT SWIFT RECORDING PROCEDURE

This crib sheet should be used in conjunction with the Swift training manuals and other crib sheets.

Finding and Accessing a Person's Record



- Click on **Frontdesk**.
- Click on **Find/New** and press Shift and F4 to clear out any existing search criteria.
- Enter the details to search for the person and click on **Next >**.
- Select the person's record you wish to access by clicking on it and then select **Finish >**.
- If the person does not exist on Swift they will need to be created.

Recording Involvements




- Go to **Frontdesk** and click on **Involv** (Involvements).
- Press F6 and complete the following fields:

Date

Enter the date the involvement began.

Involvement

Click on the drop down box  and search for the person involved. Click on **Next >**. Select the person by clicking on their name and then click on **Finish >**.

Involvement Role

Select an Involvement Role.

Start Date

Enter the date the involvement began.

Notes


Enter any relevant information about the involvement e.g. "Major Works".

- Click on **Save**.

Note: a Housing OT involvement should never be recorded as a key worker involvement. Where the Housing OT is the only professional involved with a client it is not necessary to have a key team recorded.


Recording Housing OT Referral



- Go to **Frontdesk** and click on **Contacts** (Contacts).
- Press F6 and complete the following fields:
 - Contact Date – today's date will automatically be entered. Enter the date the referral was made to a Housing OT.
 - Time – the current time will automatically be entered. Enter the time the referral was made to a Housing OT.
 - Source Type – select the referral source by clicking on the drop down box  and choosing from the list of options.



For referrals from housing providers and registered landlords use a Source Type of “Registered Housing Provider”.

- Source Organisation – if the referral was made by a GP practice, hospital or a care management team, select the organisation by clicking on the drop down box  and carrying out a search.
- Text – use this field for entering detail about referrer e.g. name or organisation.



Where the referral is from a registered housing provider, the name of this provider should be entered in the Text field e.g. Bernicia.

- Outcome – select “Allocate to Housing OT” from the list of options.
- Click on **Save**.

Recording Contact Notes

- Notes relating to assessments, visits, all DFG and CSDP processes, minor works and JELS should be recorded on Swift following the Case Recording Standards guidelines.



- Go to **Contact Notes**.
- Press F6 and complete the following fields:

Note type

Select the appropriate note type.

Head Line

Enter “Homefinder OT” or “Housing OT”.

Date

Enter the date of the contact.


Note Detail

Double click in this field and enter the relevant detail.

Note: for face to face contacts the note must state location of contact, list of people present during contact, purpose of contact and outcome and actions of contact (including any problems identified, disagreements and resolutions, referrals and reasons for referral, and any other decisions made and the reasons why).

Start Time/End Time




Enter the time if relevant.

- Click on .

Ending Involvements

The Housing OT involvement must be closed on Swift once the involvement has ended.



- Go to  and click on  (Involvements).
- Select the involvement of the Housing OT professional.
- Enter an end date.
- Click on . Any involvement role recorded will be automatically ended.