

# CRIB SHEET – INVOLVEMENTS

## Recording Team Involvement

Before a client is allocated to a key worker they are allocated to a key team and this is recorded on the Involvements screen. Additional team involvements, other than Key Team can also be added.

- Press F6 and complete the following fields:

### Start Date

Enter the date the team became involved.

### Organisation

Search for the team the case is being allocated to.

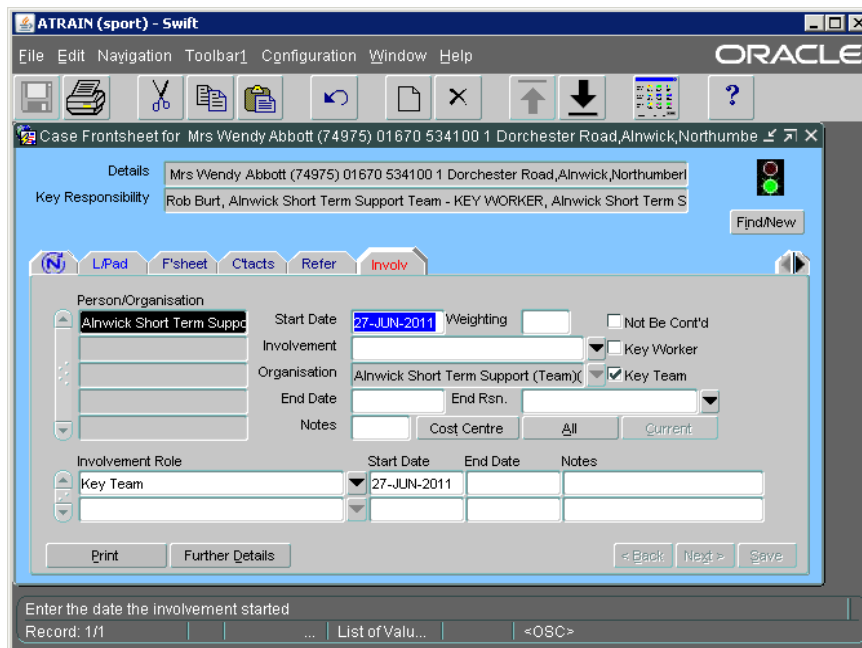
*Note: searching by short name is the quickest way to find a team. The short name is the cost centre code of the team.*

### Key Team

If the team is to be Key Team then click in the Key Team box. Once this is ticked the key team will display in the client's header details along the top of the screen.

- Click on .

*The completed screen may look something like this:*



The screenshot shows the 'ATRAIN (sport) - Swift' application window. The title bar includes 'File Edit Navigation Toolbar1 Configuration Window Help' and the 'ORACLE' logo. The main window displays 'Case Frontsheet for Mrs Wendy Abbott (74975) 01670 534100 1 Dorchester Road, Alnwick, Northumb...'. Below this, there are fields for 'Details' and 'Key Responsibility'. The 'Involvements' tab is active, showing a list of 'Person/Organisation' entries. The first entry is 'Alnwick Short Term Supp' with a 'Start Date' of '27-JUN-2011'. The 'Key Team' checkbox is checked. At the bottom, there are buttons for 'Print', 'Further Details', '< Back', 'Next >', and 'Save'.

## Recording Worker Involvement

- Press F6 and complete the following fields:

### Start Date

Enter the date the case was allocated to the worker.

### Involvement

Search for the worker who the case is being allocated to.

### Organisation

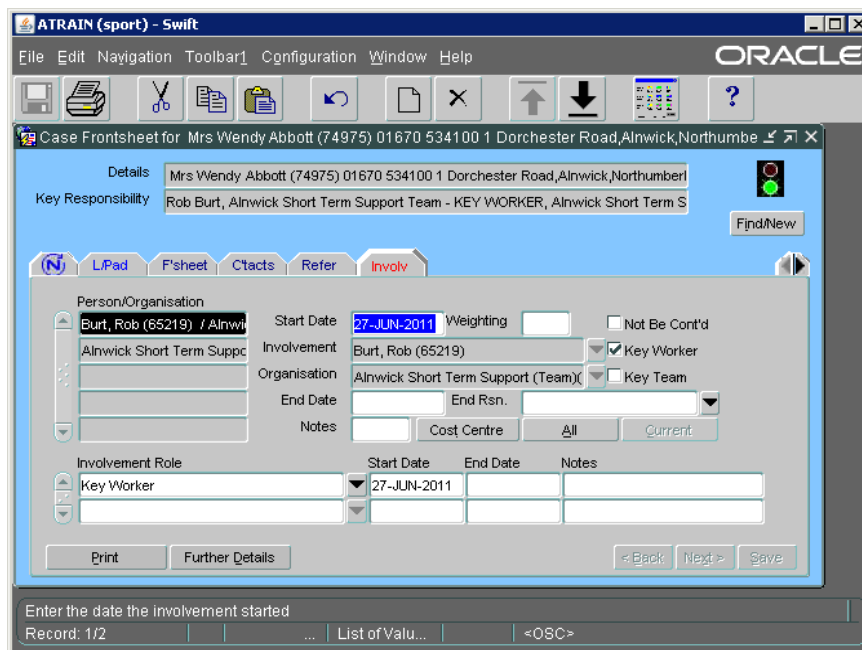
No input necessary. The team of the person entered as the worker will automatically display.

### Key Worker

If the worker is to be key worker for the client then click in the Key Worker box. Once this is ticked the key worker's name will display in the client's header details.

- Click on .

The completed screen may look something like this:




The screenshot shows the 'Involve' screen in the ATRAIN (sport) - Swift software. The window title is 'ATRAIN (sport) - 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 details for a case: 'Case Frontsheet for Mrs Wendy Abbott (74975) 01670 534100 1 Dorchester Road, Alnwick, Northumberl'. Below this, the 'Details' section shows 'Mrs Wendy Abbott (74975) 01670 534100 1 Dorchester Road, Alnwick, Northumberl' and 'Key Responsibility: Rob Burt, Alnwick Short Term Support Team - KEY WORKER, Alnwick Short Term S'. The 'Involve' screen is active, showing a list of 'Person/Organisation' entries with 'Burt, Rob (65219) / Alnwick Short Term Suppc' selected. The 'Start Date' is set to '27-JUN-2011'. The 'Involvement' field is 'Burt, Rob (65219)' and the 'Organisation' is 'Alnwick Short Term Support (Team)'. The 'Key Worker' checkbox is checked. The 'Involvement Role' is 'Key Worker'. The 'Start Date' for the role is '27-JUN-2011'. The 'End Date' and 'Notes' fields are empty. The 'Cost Centre' is 'All' and the 'Current' checkbox is checked. The 'Print' and 'Further Details' buttons are visible at the bottom. The status bar at the bottom shows 'Enter the date the involvement started', 'Record: 1/2', and '<OSC>'. The Oracle logo is visible in the top right corner.

## Recording Involvement Role of Subscribed

Any professional recorded as an involvement on the Involvements screen can be notified of any contact notes entered against a client they are involved with providing they have an involvement role of 'Subscribed' recorded against their involvement.

*Note: key workers will be automatically notified of contact notes entered against clients they are key worker for.*

- Click in the Involvement Role field and select 'Subscribed' from the list of options.
- Enter the involvement start date in the Start Date field.
- Click on .

The completed screen will look similar to this:

ATRAIN (gdollin) - Swift

File Edit Navigation Toolbar1 Configuration Window Help

ORACLE

Case Frontsheet for Mrs Olive Grove (74546) 01670 5444444 19 Harpers Lane, Alnwick, Northumberland

Details Mrs Olive Grove (74546) 01670 5444444 19 Harpers Lane, Alnwick, Northumberland

Key Responsibility Gwen Dollin, Alnwick Intake Team - KEY WORKER, Alnwick Intake Team 01665 603

Find/New

Involve

Person/Organisation

Alnwick Intake (Team)(11532) Start Date 30-AUG-2011 Weighting  Not Be Cont'd

Gayle, Abby (65223) / Aln Involvement Gayle, Abby (65223) Key Worker

Dollin, Gwen (65217) / Aln Organisation Alnwick Intake (Team)(11532) Key Team

Gpn Bondgate Practice (G) End Date  End Rsn.

Notes  Cost Centre  All  Current

Involvement Role Start Date End Date Notes

Subscribed 19-SEP-2011

Print Further Details < Back Next > Save

Enter the date the involvement started

Record: 2/4 ... List of Valu... <OSC>

## Ending Involvement Role of Subscription

Where your involvement with a client is ending, when Swift is updated this will automatically end the involvement role of 'Subscribed'. If your involvement is to continue but you want to stop receiving workflow jobs advising of contact notes recorded against clients you are involved with you should end your involvement role.

- On the Involvement screen click on your involvement.
- Enter the date in the End Date field in the Involvement Role section of the screen in the lower part of the screen.
- Click on .

The completed screen will look similar to this:

ATRAIN (gdollin) - Swift

File Edit Navigation Toolbar1 Configuration Window Help

ORACLE

Case Frontsheet for Mrs Olive Grove (74546) 01670 5444444 19 Harpers Lane, Alnwick, Northumberland

Details Mrs Olive Grove (74546) 01670 5444444 19 Harpers Lane, Alnwick, Northumberland

Key Responsibility Gwen Dollin, Alnwick Intake Team - KEY WORKER, Alnwick Intake Team 01665 603

Find/New

Involve

Person/Organisation

Alnwick Intake (Team)(11532) Start Date 30-AUG-2011 Weighting  Not Be Cont'd

Gayle, Abby (65223) / Aln Involvement Gayle, Abby (65223) Key Worker

Dollin, Gwen (65217) / Aln Organisation Alnwick Intake (Team)(11532) Key Team

Gpn Bondgate Practice (G) End Date  End Rsn.

Notes  Cost Centre  All  Current

Involvement Role Start Date End Date Notes

Subscribed 19-SEP-2011 20-SEP-2011

Print < Back Next > Save

Enter the date the involvement role ended

Record: 1/1 ... List of Valu... <OSC>

## Recording GP Practice

As part of the referral process GP Practice should be recorded on Swift. It is mandatory to record the practice however if you wish to record the GP name then this can be entered in the notes field as you are entering the practice.

- Press F6 and complete the following fields:

### Start Date

Enter the date the referral was made.

### Involvement

Ignore this field as GP Practice is recorded in the Organisation field.

### Organisation

Enter the appropriate GP Practice.

*Note: a quick way to find GP Practice is to type in the letters **GP** followed by a letter relating to the area that the practice is in and press the tab key.*

### Example

**GN** for a practice in the North area of the County.

**GC** for a practice in Central area of the County.

**GS** for a practice in the South area of the County.

**GW** for a practice in the West area of the County.

**GO** for a practice that is not in Northumberland but is in the surrounding areas i.e. North Tyneside.

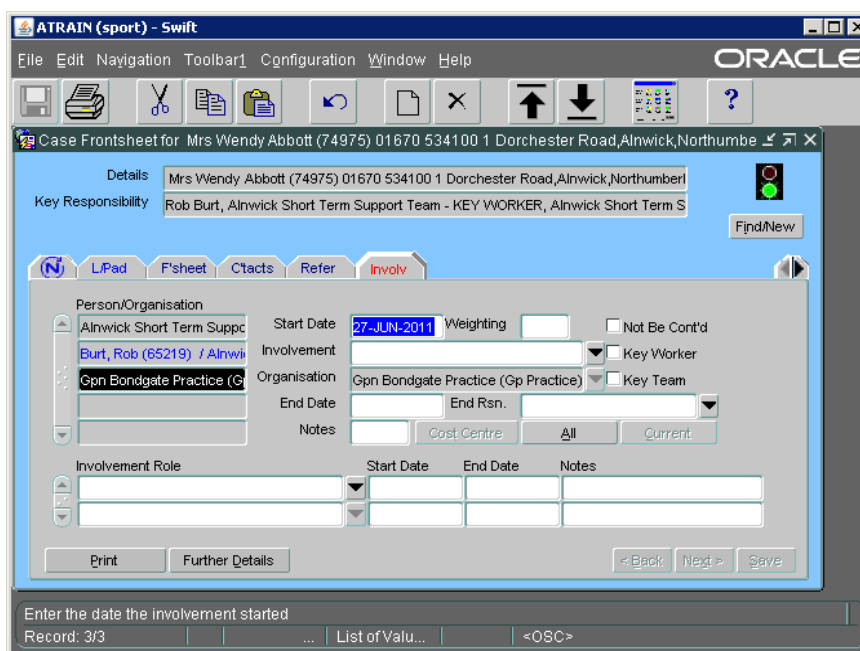
**GP\* Not Registered** for clients who are not registered with a GP

### Notes

If you wish to record the client's actual GP you can do so by typing in the GP name in this field.

- Click on .

*The completed screen should look something like this:*



The screenshot shows the 'Involve' screen in the ATRAIN (sport) - Swift software. The window title is 'ATRAIN (sport) - 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 shows details for a client: 'Mrs Wendy Abbott (74975) 01670 534100 1 Dorchester Road, Alnwick, Northumberl'. Below this, the 'Key Responsibility' is listed as 'Rob Burt, Alnwick Short Term Support Team - KEY WORKER, Alnwick Short Term S'. The 'Involve' tab is selected, showing a list of GP practices. The 'Person/Organisation' field is set to 'Alnwick Short Term Suppc'. The 'Start Date' is '27-JUN-2011'. The 'Involvement' field is empty. The 'Organisation' is 'Gpn Bondgate Practice (Gp Practice)'. The 'End Date' and 'End Rsn.' fields are empty. The 'Notes' field is empty. The 'Involvement Role' field is empty. The 'Print', 'Further Details', '< Back', 'Next >', and 'Save' buttons are visible at the bottom. The status bar at the bottom shows 'Enter the date the involvement started', 'Record: 3/3', and '<OSC>'.

## Ending Involvements

When an involvement ends this needs to be reflected in the person's Swift record. Involvements can end at various stages and for various reasons, for example a specialist assessor's involvement may end though a key worker remains involved.

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

*The following screen will be displayed:*

- Click on the involvement that needs to be ended. Be careful to click on the correct one to ensure that you do not close of the wrong involvement.
- 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 date the involvement ended in the End Date field.
- Click on **Save**.

*Note: any involvement role entered will be automatically ended.*