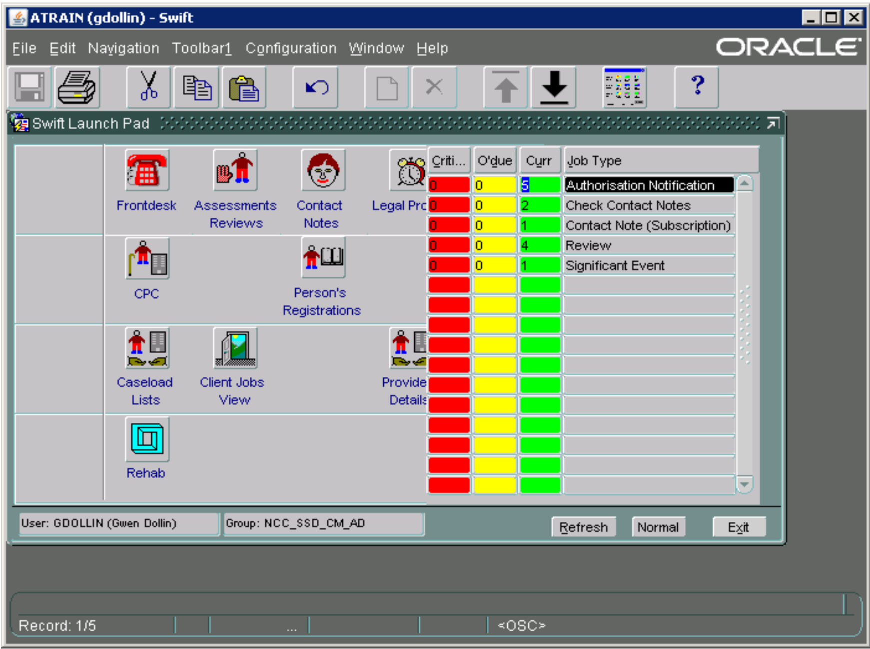
CRIB SHEET - VIEWING CHECK CONTACT NOTE WORKFLOW JOBS

When you log into Swift you will be able to see the Workflow In Tray on the right hand side of your Launch Pad. This 'in tray' will list all of the outstanding workflow jobs that are allocated to you.

You will see a screen similar to this:



Contact Note Workflow Job Types

The following table provides examples of different Contact Note Workflow Job Types that you may receive depending on your role:-

Job Type	Description
Check Contact Notes	Received by the key worker when a contact note has been recorded by someone other than the key worker.
Significant Event	Received by the key worker when a contact note marked as a significant event has been recorded by someone other than the key worker.
Contact Note (Subscription)	Received by any professional who has recorded a 'Subscribed' involvement role against their involvement on a client's record where a contact note has been recorded by someone other than themselves.

Viewing Contact Note Workflow Jobs

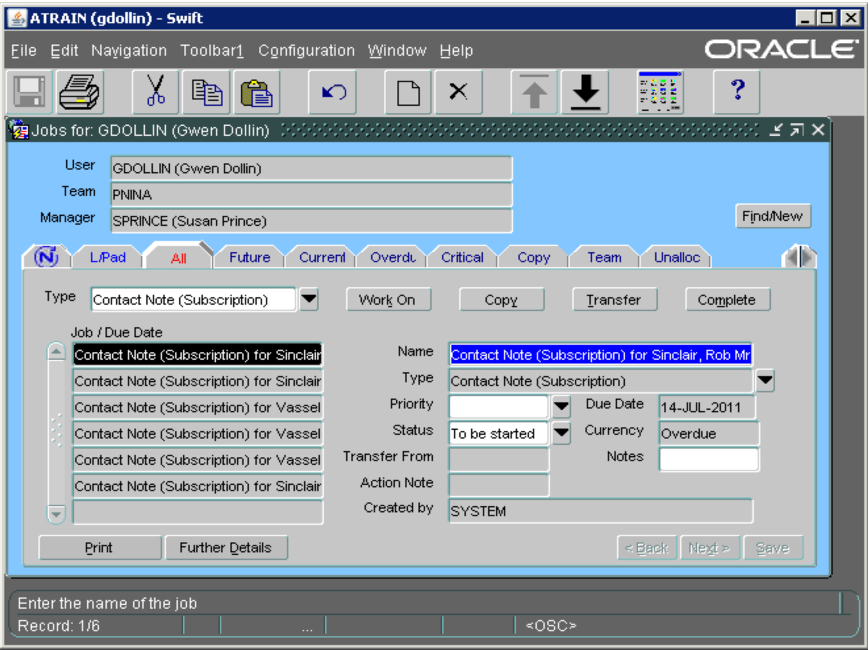
You can view any contact note that has been written by another worker directly from the workflow job via a Contact Notes WF [Contact Notes WF] report off the print button. There is no need to go into contact notes module to search for the individual note.

Accessing the Contact Notes WF Report

When you receive a workflow job for either "Check Contact Notes", "Significant Event" or " Contact Notes (Subscription)" you should action the following:

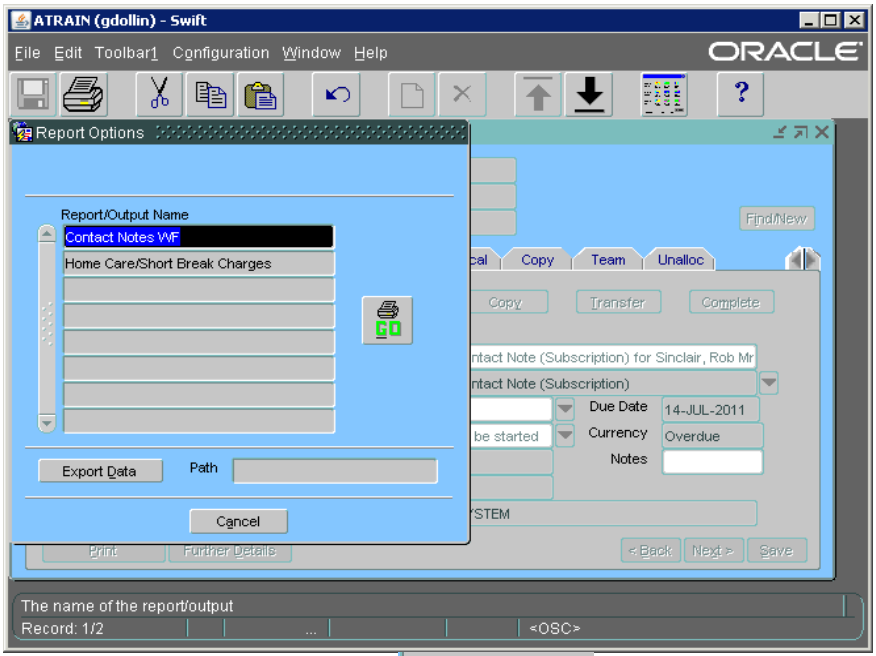
- Click on the required workflow job in the Workflow Intray. This would be either a "Significant Event", "Check Contact Note" or "Contact Note (Subscription)" workflow job for specific client.

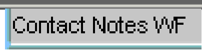
The following screen will be displayed:



- Click on the client record whose contact note you wish to view, in the Job/Due summary list.
- Click on Print button. Print

The following screen will be displayed:



- Click on Contact Notes WF report 

- Click on 

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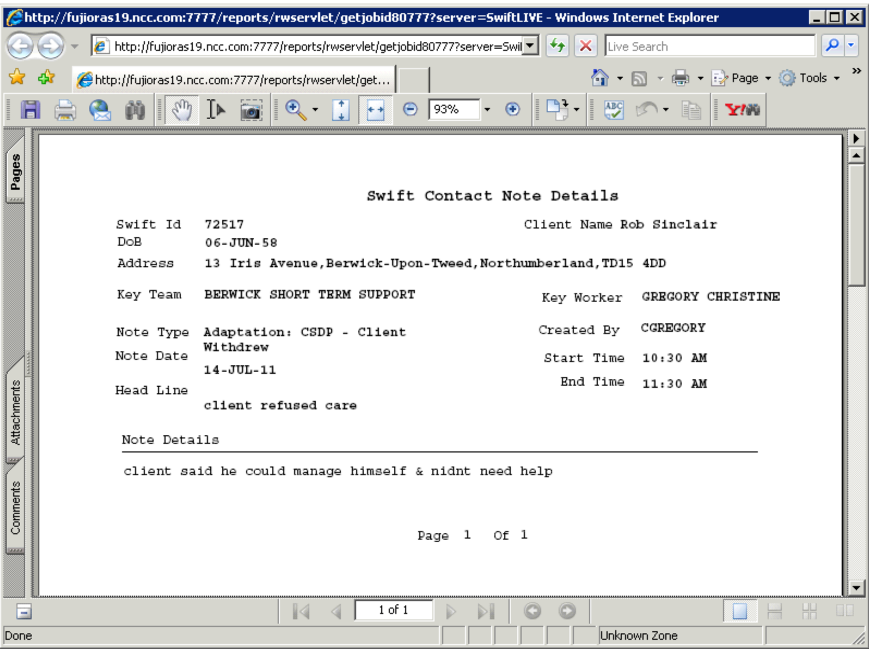
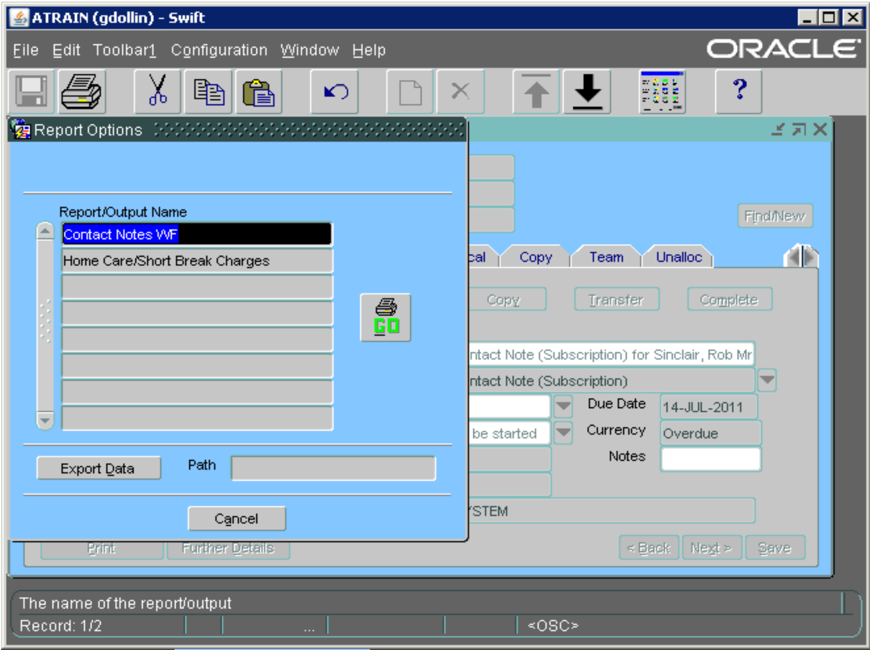
The following screen will be displayed:



- The Contact Notes WF report will display. The report details the name of the worker who recorded the contact note, the date the note was written, as well as the complete note detail. Once you have checked the contact note you can print the contact note if required and then close down the report by clicking on the cross in the top right corner.

The following screen will be displayed:

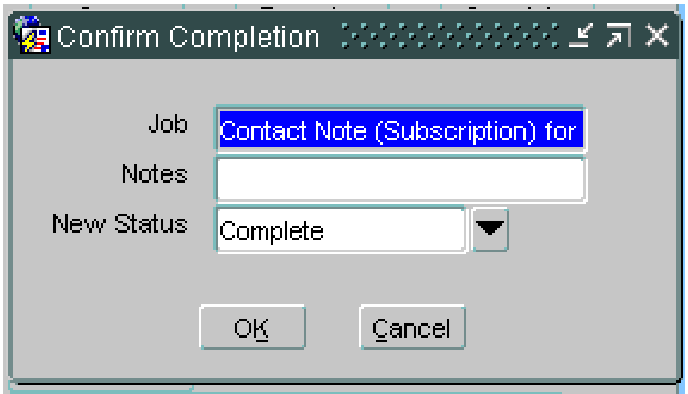


- Click on  to return to workflow screen.

Completing the Workflow Job

- Click on the workflow job you wish to complete.
- Click on .

The following screen will be displayed:



- Click on  to complete and remove the workflow job.