CRIB SHEET – SWIFT WORKFLOW

This crib sheet provides information on the different types of workflow jobs that are commonly generated in Swift and how to action them.

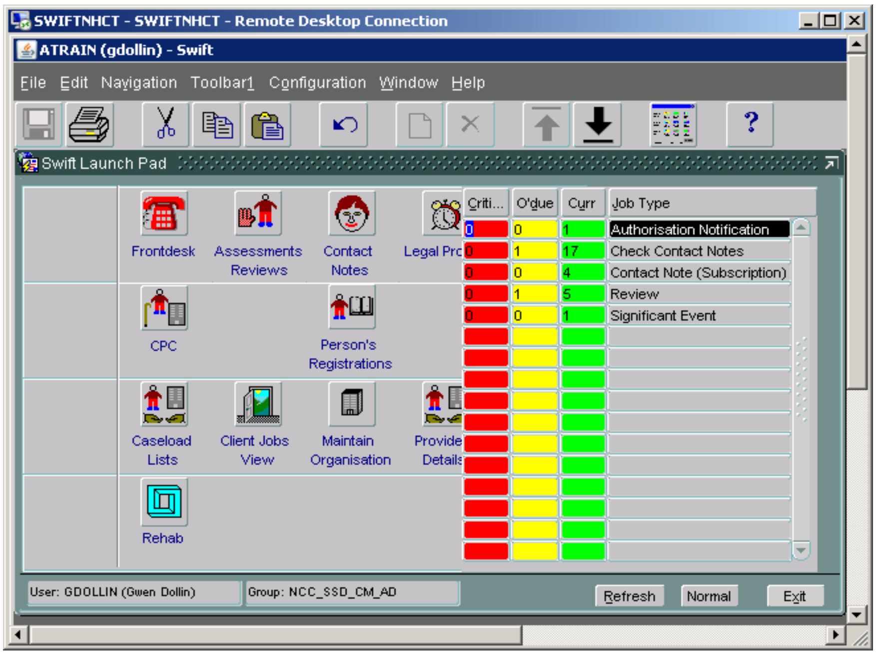
About Workflow

Workflow is a notification facility that produces electronic workflow jobs that can be viewed via your Launch Pad. The workflow jobs received may require you to carry out a task, e.g. arrange a client review or they may provide you with information you need to see i.e. notification that someone has entered a contact note against a client that you are key worker for.

A list of the most common workflow jobs can be found in the appendix at the end of this crib sheet.

Viewing Workflow Jobs

When you log into Swift you will be able to see your 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.



Each workflow job has a currency that changes as time progresses; from future, to current (green column), to overdue (amber column) and finally to critical (red column).

Note: *future workflow jobs can only be viewed when in the workflow screens.*

The Critical, Overdue and Current columns show the number of jobs for each job type which have been allocated to you.

Accessing Workflow Jobs

By clicking on the workflow job from the Workflow In Tray you will be taken to the workflow screens:

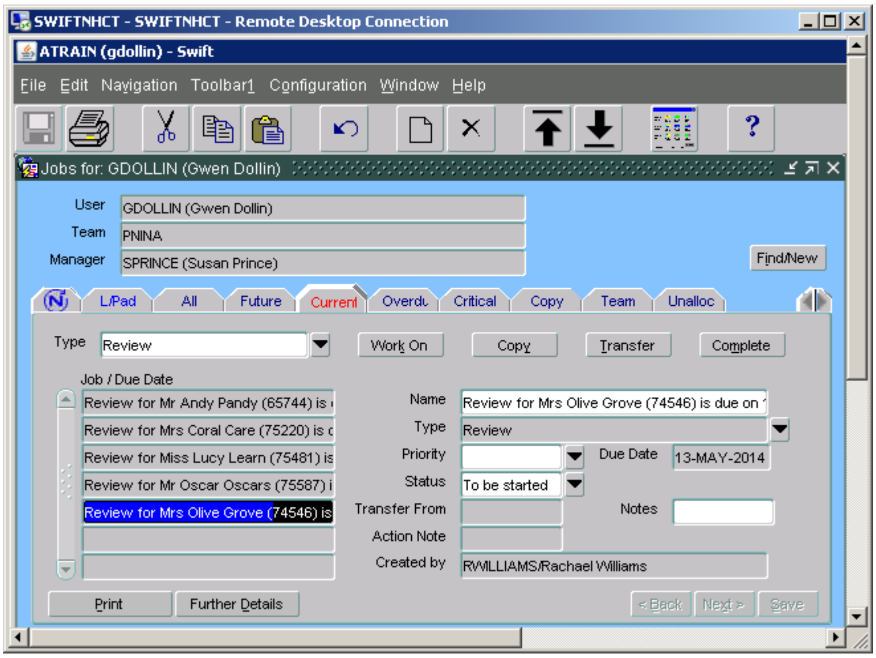
- Click in the Job Type column - you will be taken to 

.
- Click in the Curr (green) column - you will be taken to 

(Current).
- Click in the O'due (yellow) column - you will be taken to 

(Overdue).
- Click in the Criti (red) column - you will be taken to 

.



Screen showing list of Current reviews due for user GDollin

The workflow screens give you information about each workflow job:

- Name
  The job type and the name of the client it is associated with.
- Job Type
  The job type e.g. the name of the workflow job.
- Due Date
  Generally this is the date by which the job should be completed and will automatically be created when the job is sent.
- Currency
  This will either display; Future, Current, Overdue or Critical and is dependent on the job type and due date.

Dealing with Workflow Jobs

Some workflow jobs require you to carry out an action before they can be removed from Swift. For example, when you receive a Review workflow job you can only remove this from your workflow by recording a completion date against the review.

Some workflow jobs can be removed once you have viewed the information e.g. a contact note notification that can be deleted once you have read the information.

Appendix 1 details what you need to do in order to remove each workflow job.

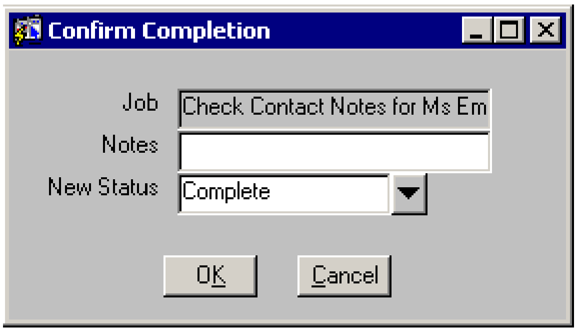
Completing a Job

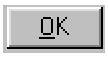
If the workflow job does not require any further action, you can complete this to remove this from your workflow.

- Click on the job you wish to complete in the Job/Due Date summary list.
- Click on 

.

  The following window will be displayed:



- Click on 

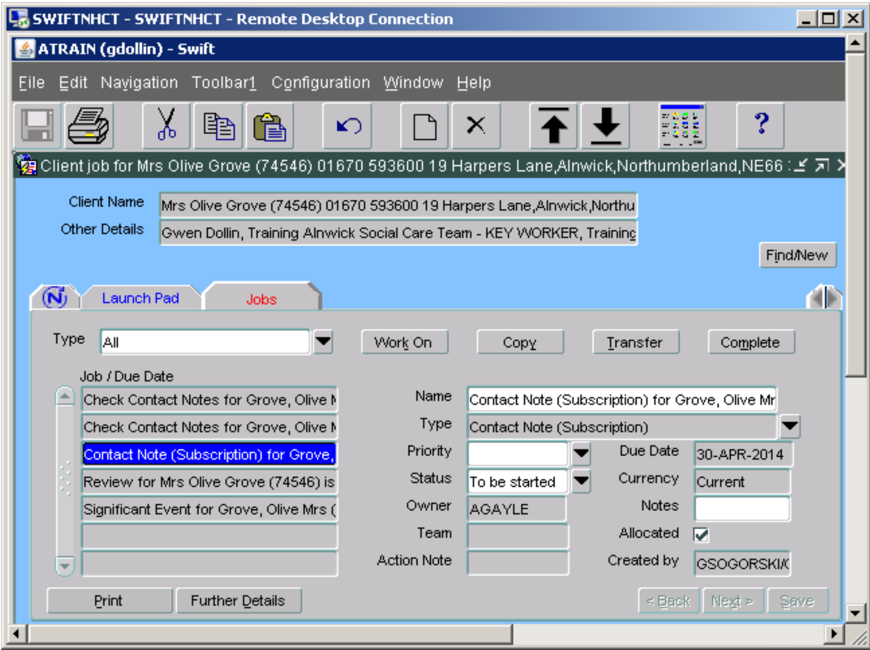
and the job will be deleted from your Workflow In Tray.

Viewing Workflow Jobs for a Specific Client

- Your Workflow In Tray shows you all of your workflow jobs relating to the clients you have an involvement with.
- There is a module you can access to see a list of all workflow jobs for a particular client and who the owners of these job are.
- Access 

 via Launch Pad or by using navigate. If you have accessed Client Jobs View via Launch Pad you will need to find the client.

  The following screen will be displayed.



Note: *the Owner field will display the username of the Swift user who has the workflow job in their Workflow In Tray.*

Appendix 1

Workflow Job Name	Why you have received it	Action required on Swift
Authorisation Notification	Costed services for a client you are key worker for have been authorised by the Team Manager.	No action required. Click on Complete to remove the workflow job.
Authorise a Prov Amendment	For Team Managers only. A change to a costed service that requires authorisation.	Click on Work On and authorise/reject as appropriate.
Authorise a Provision	For Team Managers only. A new costed service that requires authorisation.	Click on Work On and authorise/reject as appropriate.
CHC Panel Decision	Where further information is required by the Nurse Assessment team (NAT) for a panel decision.	Provide the relevant information to NAT and they will update Swift and the workflow job will be automatically removed.
CHC - Approved for 100% CHC eligibility CHC - Approved for FNC Only Eligibility CHC - Approved for Shared Care Eligibility CHC - Not Eligible for CHC, Shared or FNC recorded	For Team Managers only. Where a contact note type of CHC Panel Eligibility Decision or CHC Fast Track Decision is recorded by Nurse Assessment Team.	Notify admin with the details of the client and the CHC Eligibility decision so they can update CPC as appropriate. Click on Complete to remove the workflow job.
Check Contact Notes	A contact note has been recorded against a client you are key worker for.	Access the job from your In Tray and click on the Print button. Select the Contact Notes WF report to view the contact note details. Once you have read the information you can close the report and Complete

Workflow Job Name	**Why you have received it**	**Action required on Swift**
		the workflow job.
Contact Note (Subscription)	A contact note has been recorded against a client you are involved with. You will have been recorded with an Involvement Role of Subscribed in order to receive this workflow notification.	Access the job from your In Tray and click on the Print button. Select the Contact Notes WF report to view the contact note details. Once you have read the information you can close the report and Complete the workflow job.
Date of Death Notification	A date of death has been entered against a client you are key worker for.	Complete the workflow job.
FA completed	A financial assessment has been carried out on a client you are key worker for.	Complete the workflow job.
Signed IPA Not Received	Where you have recorded an ‘Individual Placement Agreement Completed’ contact note but there has **not** been a subsequent ‘Individual Placement Agreement Signed’ contact note recorded within four weeks.	Once the IPA has been returned from provider signed then record an ‘Individual Placement Agreement Signed’ contact note and complete workflow. Note: -this workflow job cannot be deleted or removed by just completing it as the workflow job will continue to return until the appropriate contact note type is recorded
New RiO Info Notification	For clients who have an involvement with an NTW professional as well as social care, the social care key worker or broker receives notification that some information has been updated in RiO.	Access the job from your In Tray and click on the Print button. Select the Client Information from RiO report to view the details. Once you have accessed the information you can close the report and Complete the workflow job.
OT Monitoring Review	4 weeks before the OT Monitoring is due the worker recorded in the involvement screen who has been recorded with involvement	Click on Work On which takes you to the Review Screen, select the OT monitoring event in the comp field enter the date

Workflow Job Name	**Why you have received it**	**Action required on Swift**
	role of OT Monitoring will receive an OT Monitoring Review workflow job reminding them that OT Monitoring is due.	the OT monitoring took place click on save. If a future OT monitoring is required then refer to Recording OT Monitoring in Swift Crib Sheet.
Rejection Notification	Costed services for a client you are key worker for have been rejected by the Team Manager. This will usually be because of an admin input error rather than non approval of services.	No action required. Click on Complete to remove the workflow job.
Review	A review is due for a client you are key worker for.	Once the review has been carried out, record the Completion date of the review. The workflow job will then be automatically removed.
Safeguarding Decision Needed	For Team Managers only. Where a Safeguarding Referral contact note has been recorded in Swift.	Once a Safeguarding Referral Form Update contact note is recorded, this workflow will be automatically removed.
Significant Event	A contact note has been recorded against a client you are key worker for and this has been ticked as a Significant Event.	Access the job from your In Tray and click on the Print button. Select the Contact Notes WF report to view the contact note details. Once you have read the information you can close the report and Complete the workflow job.
SPA Telephone Contact Note	A SPA Telephone Message contact note has been recorded by a member of SPA team against a client you are key worker for. This contact note should be read within 24 hours of receipt of workflow job.	Access the job from your In Tray and click on the Print button. Select the Contact Notes WF report to view the contact note details, Once you have read the information you can close the report and Complete the workflow job.
Valley Care Telephone	A Valley Care Telephone Message contact note has	Access the job from your In Tray and click on the Print

Workflow Job Name	**Why you have received it**	**Action required on Swift**
C.Note	been recorded by a member of Valley Care team against a client you are key worker for. This contact note should be read within 24 hours of receipt of workflow job.	button. Select the Contact Notes WF report to view the contact note details, Once you have read the information you can close the report and Complete the workflow job.
View a Provision Amendment	For Team Managers only. A change to a costed service that requires authorisation – where there has previously been a different team's budget recorded for the costed service.	Click on Work On and authorise/reject as appropriate.