

Systems Support

Swift Training



Frontdesk

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Northumbria Healthcare 

NHS Foundation Trust

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NORTHUMBERLAND
COUNTY COUNCIL

Contents


ACCESSING FRONTDESK	1
ABOUT PERSON SEARCHES	1
FINDING A PERSON	1
Person Found	4
Person Not Found	5
ABOUT ADDRESSES	7
FINDING AN ADDRESS	7
Address Not Found	9
FINDING AN ORGANISATION	11
Organisation Quick Search	11
Organisation Search Wizard	12
Organisation Not Found	13
CREATING A PERSON	14
Duplicate Records	16
FRONTSHEET	17
ADDRESSES AND TELEPHONE NUMBERS	19
Recording Address and Telephone Number	19
Changing a Person's Address and Telephone Number	20
Recording An Additional Telephone Number	21
OTHER NAMES	23
RELATIONSHIPS	25
Viewing Relatives Basic Details	26
LANGUAGES	28
HAZARDS	29
PAPER FILE LOCATION	30
Recording Paper File Location	30
Ending the Paper File Location	31
Transferring a Paper File to a new File Location	31
Recording a Request for File Transfer	31
Recording the File has been Received	32
Transferring a Paper File into Storage	33

CATEGORY.....	34
OTHER REFERENCES.....	35
ENTERING A REFERRAL	36
Completing the Contacts Screen.....	36
Completing the Referral Screen	38
Completing the Involvements Screen.....	39
Recording GP Practice	40
Recording Key Team Involvement.....	40
Recording Key Worker Involvement	41
INVOLVEMENTS.....	43
Recording Involvements.....	43
Viewing Involvements.....	44
Ending Involvements.....	44
TRANSFERRING A CASE.....	46
Transfer Within the Same Team.....	46
Involvements Screen	46
Transfer to Another Team – Transferring Team Actions	46
Involvements Screen	46
Paper File Location Screen	46
Costed Packages of Care.....	46
Transfer to Another Team – Receiving Team Actions.....	46
Involvements Screen	46
Paper File Location.....	47
Costed Packages of Care.....	47
CLOSING A CASE	48
Closing a Case Due to Death of Client.....	48
Closing a Case for Reason Other than Death	48
Recording Death of Client	49
Closing Referral Details.....	51
AMENDING FRONTDESK INFORMATION	52
Amending a Persons Name.....	52
DELETING FRONTDESK INFORMATION.....	53
Deleting Frontsheet Information	53
Deleting Referral Information and Involvements.....	53
Deleting Client Record	53

CARERS PROCEDURE.....	54
Recording a Carer	54
Relationship Screen – Client Record	54
Addresses and Telephone Numbers Screen – Carer’s Record	54
Category Screen – Carer’s Record.....	54
Involvement Screen – Carer’s Record	54
Reviews Screen – Carer’s Record.....	54
Contact Notes – Client and Carer’s Record.....	54
Carer Becomes a Client	55
Addresses and Telephone Numbers Screen – Carer’s Record	55
Involvement Screen – Carer’s Record	55
Reviews Screen – Carer’s Record.....	55
Ending a Carer	55
Relationship Screen – Client Record	55
Addresses and Telephone Numbers Screen – Carer’s Record	55
Category Screen – Carer’s Record.....	55
Involvement Screen – Carer’s Record	55
Reviews Screen – Carer’s Record.....	56

ACCESSING FRONTDESK



- Access  via Launch Pad or by using navigate. Refer to the *Basic Use of Swift* manual.
- If you have accessed Frontdesk via Launch Pad you will need to find the client. Refer to *Frontdesk – Finding a Person* section of this manual for guidance.

ABOUT PERSON SEARCHES


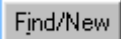
The facility for finding a person on Swift is called the Person Search Wizard and although it's used in various places in Swift, the procedure is the same. It can only be used in areas of Swift that relate to a person.

Searching for a person literally means any person on the system. This person may be for example; a professional (e.g. consultant), a specific care manager (e.g. the key worker), a relative (e.g. client's brother), a Swift user (e.g. yourself), or a particular client.

Note: to ensure client confidentiality, there will be an audit of searches carried out therefore Swift users must have a valid reason for carrying out a person search.

FINDING A PERSON



The following section details the criteria that can be used to carry out a person search, however if you are searching for a professional i.e. a care manager or any other Swift user you will only be able to search on Name as no other personal information is held.

- The person search facility can be accessed from any screen in Swift where  is displayed.
- Click on .

The following screen will be displayed:

Swift - Frontdesk - Finding a Person

Note: information from a previous search may have been retained on the Search Criteria screen and will need to be cleared before beginning your search. If you do not clear all the fields, the search may be unsuccessful.

- To clear all fields press  and .
- Any one of the following fields, or a combination of fields, can be used to carry out a person search. Click into the relevant field(s) and enter the search criteria:

Note: where you are unsure of a spelling or an actual name you can use a facility called the wildcard. The wildcard in Swift allows you to search for an unknown character or characters and is represented by a percent sign %. The wildcard represents any character and any number of characters. Therefore if you needed to find Catherine McDonald's details you could enter the following in the search criteria: Surname: M%cd%, Forename %ath% This would pick up all the variations of the spellings which could have been used: McDonald, Macdonald, McDonnell, MacDonnell etc, Catherine, Cathy, Cath, Katherine, Kath, Kathy.

Identifier

Enter the person's identifier – this is their Swift ID number and is the best criteria to use to find a person. If identifier is used there is no need to enter any other search criteria as every person on Swift has their own unique Swift identifier.

Surname

Enter the person's surname.

Note: the surname recorded will usually be the person's preferred name, however if they are known by any other name and these are recorded on Swift a search can be carried out on these other names.



If you are unsure of the spelling use the wildcard facility (%)

First Names

Enter the person's first name/s. If you don't know the person's forename but you do know their initial you must enter a wildcard after the initial e.g. J% otherwise your search will be unsuccessful.

Note: the forename recorded will usually be the person's preferred name, however if they are known by any other name and these are recorded on Swift a search can be carried out on these other names.



If the wildcard (%) is entered at the beginning and after the First Name this would help find people on Swift who have more than one name recorded.

Example

If you enter the following criteria in the First Name field; **%John%**, Swift will find any person with more than one name recorded but with one of the names being John e.g. William John, John William.



If your search is unsuccessful try repeating the search using any other name the person could be known by.

Approx/Act DOB

Enter the person's approximate date of birth or their actual date of birth.

Note: this search will only work if the date you entered in this field matches exactly with a date entered in the person's approximate date of birth or actual date of birth field.

Age In Years

If you are unsure of the approximate or actual date of birth enter the person's age in years. Less than (<) and greater than (>) symbols can be used to find clients under or over a certain age.

Example

<65 entered in the Age in Years field would find any person under the age of 65.
>80 entered in the Age in Years field would find any person over the age of 80.

Gender

Enter the relevant gender.



If you type **M** or **F** and press tab the field will automatically be completed with Male/Female.

Team

Enter the team to find clients who have an involvement with a particular team.

Note: regular audit checks are to be carried out on searches of this kind to ensure that it is being used appropriately.

Worker?

If you are searching for a worker select **Y**.

Oth. Ref. Type

Enter the type of reference you wish to use for the search e.g. NHS number (you must ensure that you complete the ID field when searching by Other Reference Type).

ID

Enter the reference ID (you must ensure that you have selected an Oth. Ref. Type when searching by ID).

Premise Name

This field is used where a property is known by a name rather than number e.g. Dove Cottage. It is also sometimes used to record where a property is part of a building or a complex e.g. Beaumont House or Alwinton Court.

Sec Name

This field is usually used for identifying flat number and this may have been recorded in two ways e.g. "Flat 1a" or "1a". Some flats on the gazetteer however are not recorded with a Secondary Name and the number of the flat has been input as Premise Number.

Premise Number

Enter the premise number.

Street

Enter the name of the street.

Note: do not use abbreviations such as Rd for Road, Cl. for Close etc. Punctuation should only be used where the street name is 'saint' and this should be entered as St. (with a full stop). For example St. Stephens Drive, St. Marys Close.

Town

Enter the postal town. If you have an address in Rothbury or Amble for example, Rothbury or Amble will be recorded in Locality and the Town will be recorded as Morpeth.

Locality

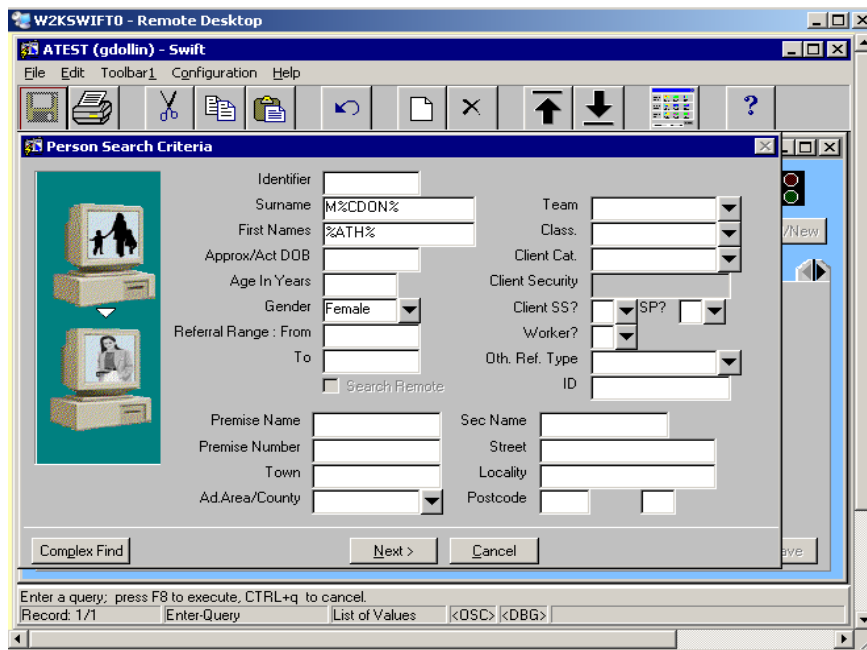
Enter the locality if applicable, i.e. the name of village or housing estate e.g. Alnmouth, Barrasford Park.

Postcode

Enter the postcode. The postcode is split into two fields; the outer code and the inner code. For example the postcode of NE61 2EF would be NE61 in the outer code (first field) and 2EF in the inner code (second field).

Note: you do not need to enter both parts of the postcode, but you will obtain better search results if you use both.

The following shows a completed Person Search Criteria screen:

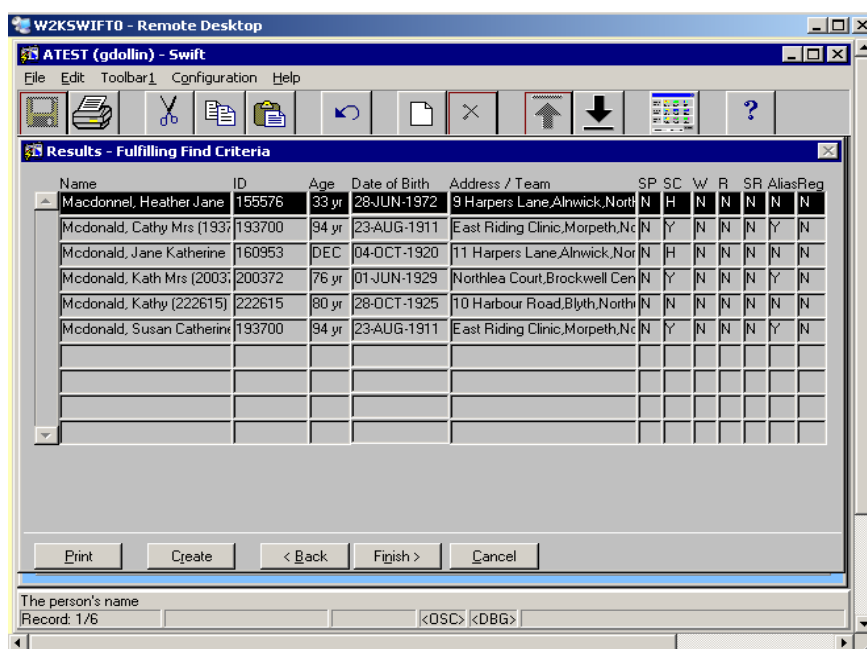


In this example the search is for Kathy McDonnell however there is doubt about the spelling of both first name and surname therefore the wildcard (%) facility was used.

- Once you have entered the search criteria click on **Next >**.

Person Found

Once the search has been carried out the Person Search Results screen will appear:



Note: when a search is carried out for a person with an other name (e.g. alias), both names may be displayed, with an identical Swift ID number. It does not matter which name you select as they will both take you to the same person's record.

The fields that are displayed are:

Name

The person's name. Where two names are displayed alongside each other, the name in brackets is the name the person is usually referred by and the name before the brackets is the person's other (or alias) name. The number in brackets at the end of the field is their Swift ID number.

ID

The person's Swift ID number. This is the number by which Swift recognises the person's record and is given to the person automatically when they are created.

Age

The person's age, in years. If the person is deceased then the letters DEC will display.

Date of Birth

The person's date of birth.

Address/Team

If the person is a worker, the team they work for will be displayed. If the person is any other person, their current home address should be displayed as well as any other address the person has lived at.

SP

Ignore this field.

SC

Ignore this field.

W

This field indicates whether the person is a worker.

R

This field indicates whether the person is a resource.

SR

Ignore this field.

Alias

This field indicates whether the person has other names recorded against them.

Reg

This field indicates whether the person has a current registration or disabled person's car badge.

- If the list is long and you can't see the person you need, use the scroll bar on the left to move up/down the list.
- Once the person is found, click on the person's name in the list to select them and click on

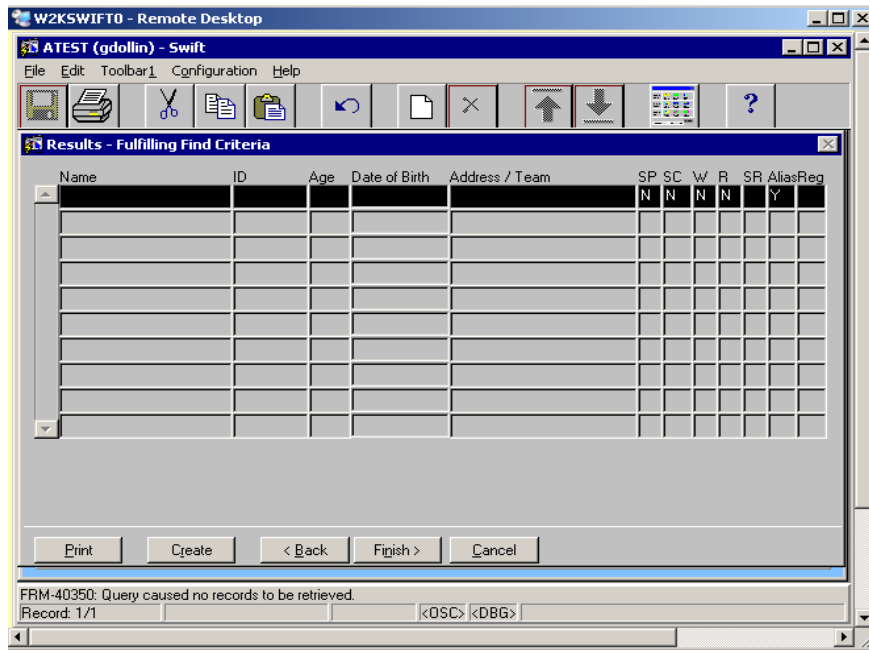


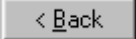


Person Not Found

In some instances a list of people who match the criteria will be displayed but the person you are searching for is not on the list.

Swift - Frontdesk - Finding a Person

If no person matches the criteria the following screen will be displayed:




- Click on .
- Alter the criteria and carry out a new search for the person (you may need to press  and  if you need to clear all the fields and start afresh).

Note: if you still do not find the person, always search again using different criteria. It is important you make thorough searches before deciding to create a person so that you do not create a duplicate record on Swift.

- If the person you are unable to find is a client, prospective client or relative/carer of a client then refer to *Frontdesk – Creating a Person* section of this manual.
- If the person you are unable to find is a professional do not create them on Swift as additional information needs to be recorded for professionals. Contact the Systems Support Help Line on (01670) 534100 who will create the person on your behalf.

ABOUT ADDRESSES

Throughout Swift there is the ability to search for addresses (Address Wizard) to attach them to a specific person's record e.g. client's home address, carer's or relative's address. The Address Wizard can be accessed from any screen where there is a  button.

When an address is searched for, Swift takes you into a database of addresses (the gazetteer). The gazetteer holds information on all Northumberland addresses.

If an address you are looking for does not exist on the gazetteer because it falls outside of Northumberland or it may be a newly built property, it can be created by a member of admin.

Note: these instructions relate to adding an address to a person's record and not finding a person via an address search. For instruction on finding a person refer to Frontdesk – Finding a Person section of this manual.

An address must always be entered on Swift even if the person has no fixed abode or if the address is unknown. Addresses have been set up for "No Fixed Abode" and "Unknown" so that you can enter these on Swift. These addresses can be found by entering **XXX** in the first or second postcode field.



The only time a person should be recorded with no address is where address details have been provided but you are unable to find the address on Swift. In this instance the address is left blank so that admin can create the address and add it to the person's record.

FINDING AN ADDRESS

- Click on  to use the Address Wizard.

The following screen will be displayed:

Note: information from a previous search may have been retained and will need to be cleared before beginning your search. If you do not clear all the fields, the search may be unsuccessful.

- To clear all fields press  and .
- Any one of the following fields, or a combination of fields, can be used to carry out an address search, though it is usually quicker to use the Postcode field if this information is known. Click into the relevant field(s) and enter the search criteria:

Note: where you are unsure of a spelling you can use a facility called the wildcard. The wildcard in Swift allows you to search for an unknown character or characters and is represented by a percent sign %. The wildcard represents any character and any number of characters. Therefore if you needed to find 4 Beach Close you could enter the following in the search criteria Property Number: 4, Street: **B%ch Close**. This would pick up all the variations of the spellings that could have been used i.e. Beach or Beech. If you were also unsure about whether the address is "Close", "Drive" or "Street" you could enter the following in the search criteria Street: **B%ch%**. This would pick up all the variations of the spellings including addresses such as Drive, Row, Street, Close etc.

Secondary Name

This field is usually used for identifying flat number and this may have been recorded in two ways e.g. "Flat 1a" or "1a". Some flats on the gazetteer however are not recorded with a Secondary Name and the number of the flat has been input as Property Number.

Name

This field is used where a property is known by a name rather than number e.g. Dove Cottage. It is also sometimes used to record where a property is part of a building or a complex e.g. Beaumont House or Alwinton Court.

Property Number

Enter the property number.

Organisation

If the property is occupied by an organisation the name can be entered into the is field e.g. Holly House Home for Older People.

Street

Enter the name of the street.

Note: do not use abbreviations such as Rd for Road, Cl. for Close etc. Punctuation should only be used where the street name is 'saint' and this should be entered as St. (with a full stop). For example St. Stephens Drive, St. Marys Close.

Locality

Enter the locality if applicable, i.e. the name of village or housing estate e.g. Alnmouth, Barrasford Park.

Town

Enter the postal town. If you have an address in Rothbury or Amble for example, Rothbury or Amble will be recorded in Locality and the Town will be recorded as Morpeth.

County

Enter the county.

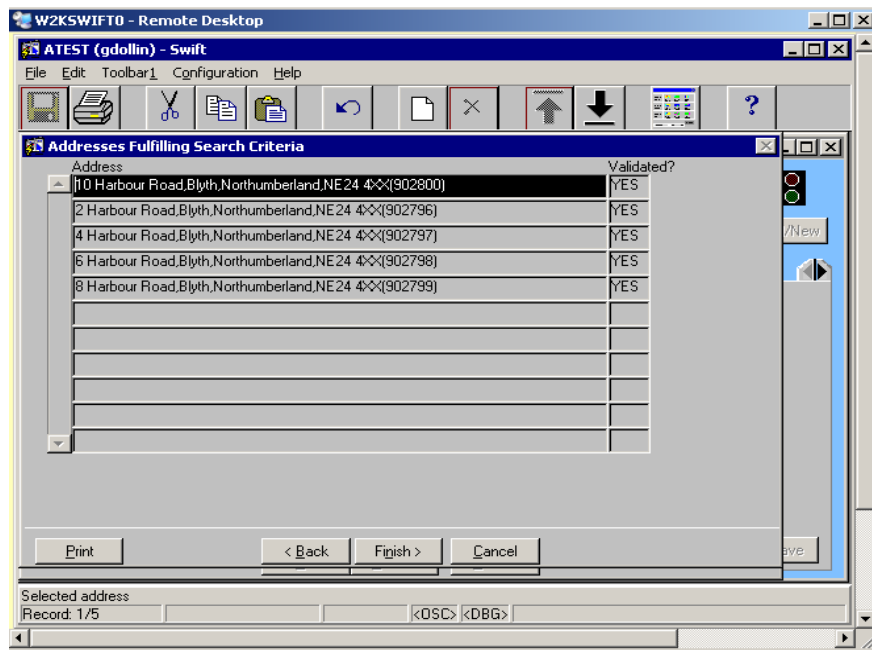
Postcode

Enter the postcode. The postcode is split into two fields; the outer code and the inner code. For example the postcode of NE61 2EF would be NE61 in the outer code (first field) and 2EF in the inner code (second field). If you are looking for an address of "No Fixed Abode" or "Unknown" enter **XXX** in the first or second field or both to find these types of address.

Note: you do not need to enter both parts of the postcode, but you will obtain better search results if you use both.

- Click on .

The following screen will be displayed:

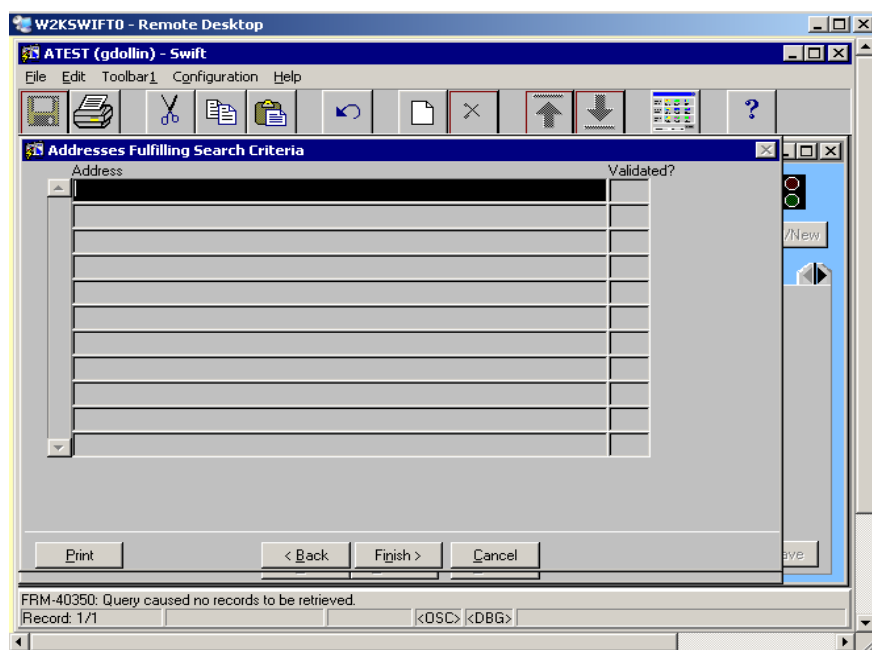


- The list is not in numerical order as Swift only sorts by the first digit.
- If the list is long and you cannot see the address you need, use the scroll bar on the left to move up/down the list.
- If the correct address is found, click on it and then click on **Finish >** (the address will be brought forward into the area of Swift in which you were working).

Address Not Found

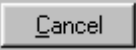
A list of addresses may be displayed but the address you are searching for is not on the list or no addresses will be displayed as no address matches the criteria you entered.

The following screen is where no address matches the search criteria:



- If the address you are searching for does not appear on the Address Search Results screen click on **< Back**.

Swift - Frontdesk - Finding an Address

- Alter the criteria and carry out a new search for the address (you may need to press j and o if you need to clear all the fields and start afresh).
- If the address is still not found, exit the search by clicking on . You will be returned to the screen where you commenced the address search. At this stage the person will be recorded on Swift without an address.
- Contact a member of admin in your office who can create addresses and give them the following information in order for them to create the address and add it to the person's record:
 - ◇ The person's name or Swift ID.
 - ◇ The address to add to the person's record.
 - ◇ The home telephone number of the person.
- Admin will inform you when the address has been added to the person's record.

FINDING AN ORGANISATION

In Swift “organisation” can have a different meaning depending on which part of the system you are using, for example in Frontdesk an organisation may be a GP Practice or a Team and in CPC (Costed Packages of Care) an organisation is a Provider. The method of searching for an organisation is the same throughout Swift and usually begins with an Organisation field and a drop down box where you can enter the information.

Organisation Quick Search

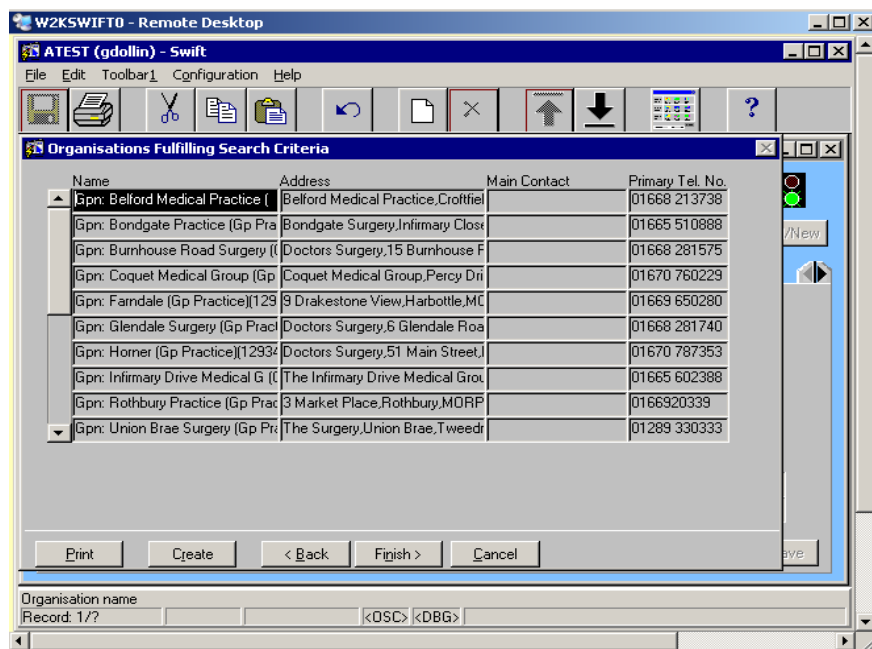
- A quick way to find an organisation is to type part of the name in the Organisation field where it needs to be entered and press the tab key. This will produce a short list of organisations which meet the criteria.
- GP practices have been set up on Swift with the first three letters as **GP** followed by a letter relating to the area.

Example	<p>GPN for a practice in the North of the County.</p> <p>GPC for a practice in the Central area of the County.</p> <p>GPS for a practice in the South of the County.</p> <p>GPW for a practice in the West of the County.</p> <p>GPO for a practice that is not in Northumberland but is in the surrounding areas i.e. North Tyneside.</p>
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*Note: if the practice is out of the area, i.e. not in Northumberland or the surrounding areas then a fictitious practice named **GP* Out of Area** has been set up so that this fact can be recorded on Swift.*

- Enter the criteria in the Organisation field and press the tab key.

The following screen will be displayed:



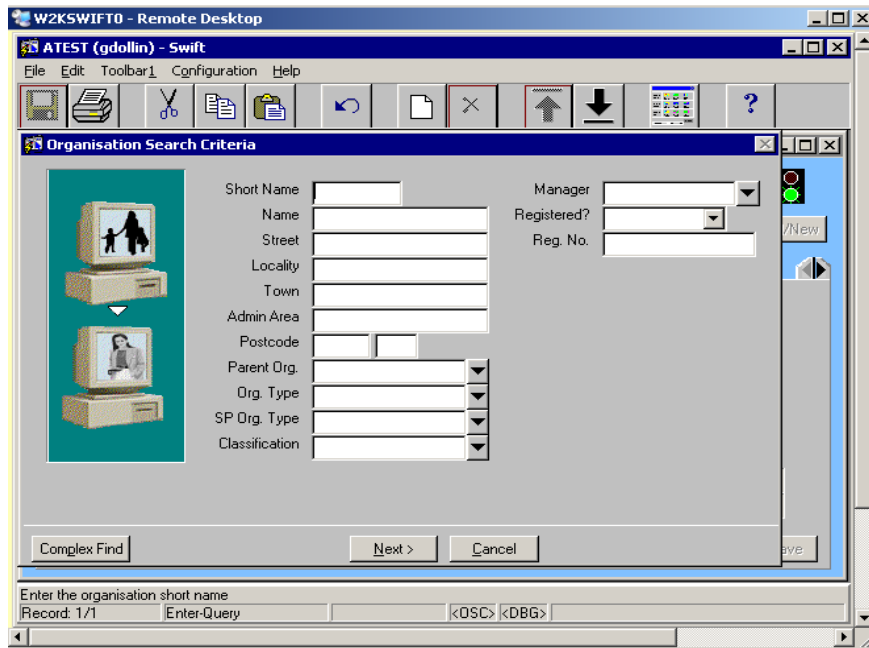
- Hospitals have also been set up on Swift in a standard way; with **HOSP** as the first four letters followed by the hospital name. If you are entering a hospital you could type **HOSP** and press the tab key.
- Other Local Authorities have been set up with **OLA** as the first three letters followed by the name of the Authority. If you wish to search for an OLA you could type **OLA** and press the tab key.
- If the list is long and you cannot see the organisation you need, use the scroll bar on the left to move up/down the list.

- Click on the appropriate organisation and click on **Finish >** (the organisation will be brought forward into the area of Swift in which you were working).

Organisation Search Wizard

- If you are unsure of how the organisation name is entered on Swift or have been unsuccessful in finding the organisation by typing in part of the name, you should use the Organisation Search Wizard.
- To begin the search, click on the drop down box where the organisation needs to be inserted e.g. in Involvements screen in Frontdesk this would be the Organisation field.

The following screen will be displayed:



Note: information from a previous search may have been retained and will need to be cleared before beginning your search. If you do not clear all the fields, the search may be unsuccessful.

- To clear all fields press **SHIFT** and **F4**.
- Any one of the following fields, or a combination of fields, can be used to carry out an organisation search. Click into the relevant field(s) and enter the search criteria:

Note: where you are unsure of a spelling you can use a facility called the wildcard. The wildcard in Swift allows you to search for an unknown character or characters and is represented by a percent sign %. The wildcard represents any character and any number of characters. Therefore if you needed to find Beachville you could enter the following in the search criteria Name: **B%V%**. This would pick up all the variations of the spellings that could have been used i.e. Beechville or Beachville etc.

Short Name

If the organisation you are looking for is a team you can usually enter the short name e.g. the cost centre code to find the team.

Manager

If the organisation you are looking for is a team then you will be able to find the team by entering the budget manager's name.

Name

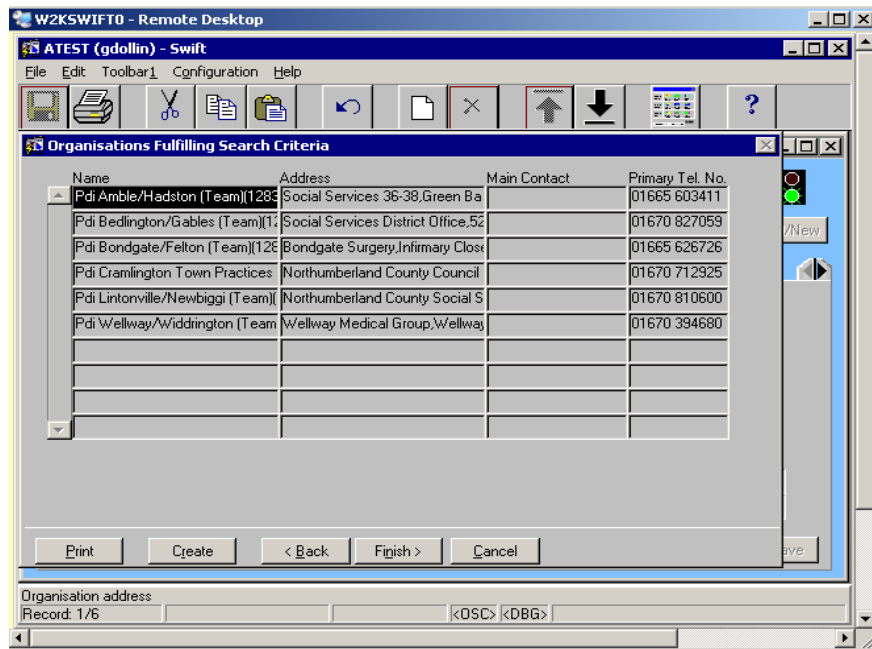
Enter the name of the organisation, using wildcards if necessary.

Org. Type

Enter the organisation type e.g. Team or GP Practice.

- Click on **Next >** to display a list matching your search criteria.

The following screen will be displayed:

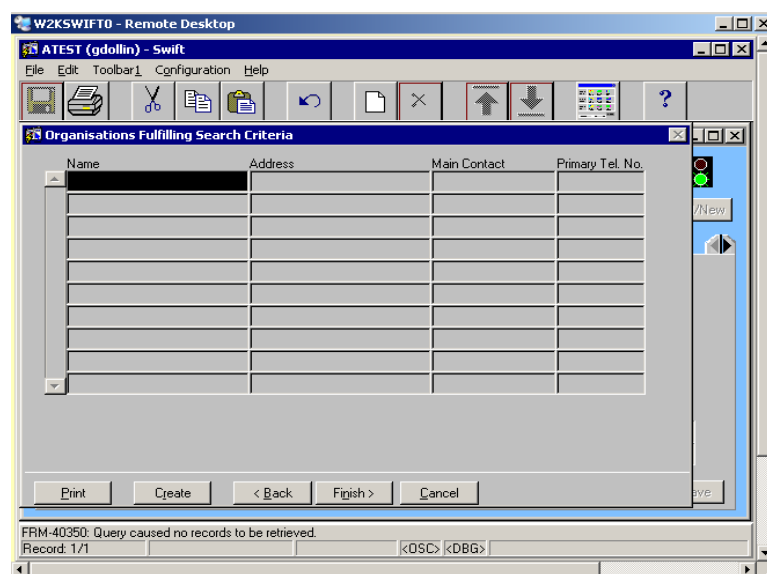


- If the list is long and you cannot see the organisation you need, use the scroll bar on the left to move up/down the list.
- Click on the appropriate organisation and click on **Finish >** (the organisation will be brought forward into the area of Swift in which you were working).

Organisation Not Found

A list of organisations may be displayed but the one you are searching for is not on the list or no organisations will be displayed as no organisation matches the criteria you entered.

The following screen is where no organisation matches the search criteria:



Click on **< Back**.

- Alter the criteria and carry out a new search for the organisation (press **SHIFT** and **F4** if you need to clear all the fields and start afresh).
- If the organisation is still not found exit the search by clicking on **Cancel**. You will be returned to the screen where you commenced the search.
- Contact the Systems Support Help Line on (01670) 534100 to request the organisation is created.

CREATING A PERSON

These instructions should only be used to create a client or a relative or carer of a client. If you require a worker to be created on Swift you must ring the Systems Support Help Line on (01670) 534100 to request the worker to be set up on Swift.

After carrying out a person search a list of those people who meet the criteria is displayed, but you may not always find the person you need. If this is the case, the person will need to be created on Swift.

Note: when you do not find the person always search again using different criteria. For example if you cannot find the person searching by name search again by address if you have the information. It is important you make thorough searches before deciding to create a person so that you avoid creating duplicates on Swift.

- Once a thorough search using different search criteria has been carried out and the person is not found, click **Create** on the Person Search Results screen.
- The Create a Person screen will be displayed and may contain some of the search criteria you entered.
- Press **SHIFT** and **F4** to clear all fields.

- Complete the following fields:

Surname

Enter the person's surname.

First Names

Enter the person's preferred first name(s).

Note: all other names the person is known by should be entered on the Other Names screen. Refer to Frontdesk – Other Names section of this manual.

Initials


No input necessary as this is automatically updated from the First Names field.

Title

Enter the person's title.

Gender

This may automatically update from the Title field. If not, enter the appropriate gender.

 *If you type **M** or **F** and press tab the field will automatically be completed with Male/Female.*

Date of Birth

Enter the date the person was born. If the date of birth is not known, leave this field blank at this stage and use the Age/Approx DoB field instead, though the date of birth must be entered once it is known.

Note: **never** type in a bogus date of birth e.g. 01/01/01 because it will appear to be a valid date of birth. If you do not know the person's actual date of birth enter an approximate date of birth in the Age/Approx DoB.

Age/Approx DoB

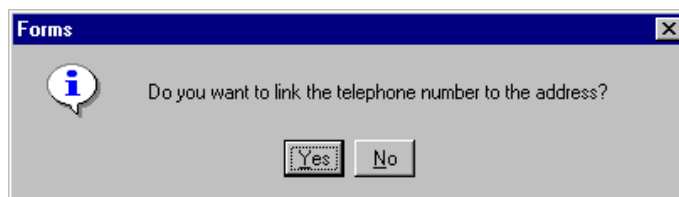
Enter the person's approximate DoB if the person's actual date of birth is not known.

- Click on **Search Address** and enter the address. Refer to *Frontdesk – Finding an Address* section of this manual.

Note: if you cannot find the address, return to the Create a Person screen and continue without the address entered. Contact a member of admin in your office who can create addresses and inform them of the person's name or Swift ID, the address you are wanting to add to the person's record and the home telephone number of the person. Admin will create the address and add this to the person's record.

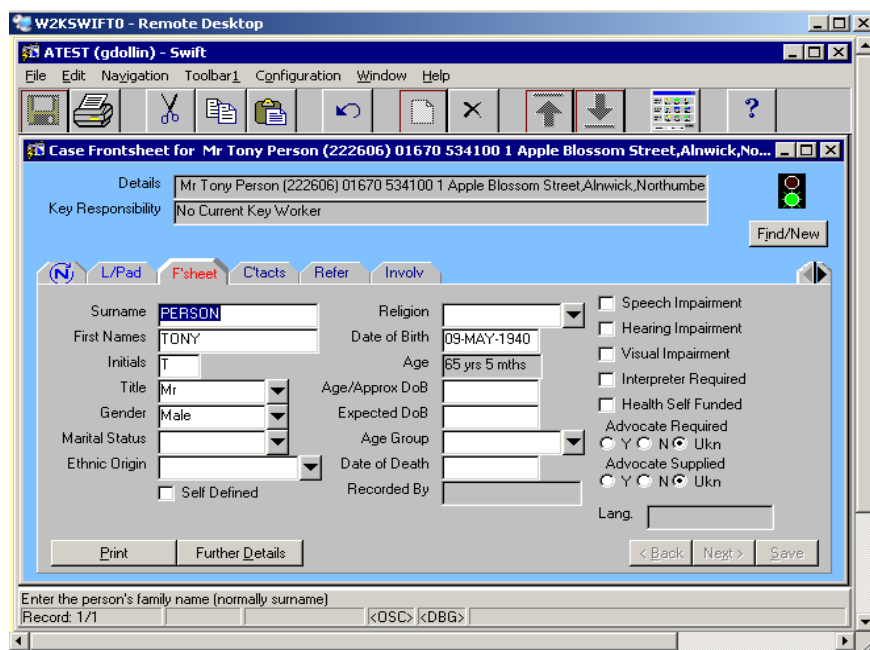
- Once the address search has been completed the Create a Person screen will be displayed with the address selected displayed in the address field. If you clicked on the wrong address and an incorrect address is displayed you can click on **Clear Address** and then go through the process of searching for an address again.
- Enter the person's telephone number in the **Tel. No.** field.
- Once all the details are completed, click on **Save**.

The following message will be displayed if you have recorded an address and telephone number:



- Click on **Yes**.

The person's details will be saved and the Frontsheet screen will be displayed, with the Person's Details in the header on the top of the screen and Key Responsibility reading "No Current Key Worker".




At this stage you have recorded basic information about a person. At a later date you may obtain further personal details about the person and this information can be added to the person's record.

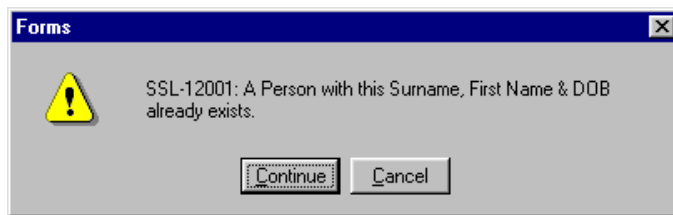
Refer to *Frontdesk – Frontsheet* section of this manual for instruction on recording this type of information.


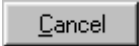
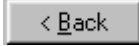

Note: it is a common mistake for a person to be created on Swift without an address. It is easy to identify where this has happened as the Header details will only display the person's name. Where this has occurred refer to Frontdesk – Addresses and Telephone Numbers section of this manual for instruction on recording an address against an existing person on Swift.

Duplicate Records

It is important that you carry out a thorough search of Swift before you begin to record a person to avoid the creation of duplicate records.

- Once you click  after you have entered the details on the Create a Person screen, if the person you are creating has the same Surname, First name and date of birth as another person on Swift the following message will appear as a warning:



- If you are certain that you searched thoroughly before commencing creating a person then click on  to carry on with creating a person on Swift.
- If you are uncertain that you carried out a thorough enough search click on  to return you to the Create a Person screen. Click on  to return to the Person Search Results screen and click on  again to take you to the Person Search screen where you can carry out a thorough search to find the client.

FRONTSHEET

The person's basic details such as name, address, telephone number, other names and relatives are held in Frontsheet and in the further details of Frontsheet. Information can be entered in Frontsheet as part of the referral process or later as more information is gathered.

- Click on **F'sheet** (Frontsheet).

The Frontsheet screen will be displayed with the person's name, Swift ID number, telephone number and address in the header details at the top of the screen:

- The following information needs to be recorded, though some of it may already be entered. Click into each field which needs information added and enter the detail:

Surname

This will be the family name of the person.

First Names

Enter either the person's preferred first name(s) e.g. Bill for William. If they do not have a preferred name enter their formal first name.

Note: if the person's preferred first name is entered, you must also record the formal first name, e.g. William, in the Other Names screen. Refer to Frontdesk – Other Names section of this manual.

Initials

No input necessary as this is automatically updated from the First Names field.

Title

Enter the person's title.

Gender

This may automatically update from the Title field. If not, enter the appropriate gender.



If you type **M** or **F** and press tab the field will automatically be completed with Male/Female.

Ethnic Origin

Enter the person's ethnic origin

Self Defined

Tick this box if the person has defined their own ethnicity.

Religion

This information is not a requirement, but you may record it if you feel it would be useful.

Date of Birth

Enter the date the person was born. If this information is not known, leave this field blank and enter an age or approximate DoB in the Age/Approx. DoB field.

Note: Swift will not allow the recording of both the actual DoB and an approximate DoB, therefore in order to enter the actual DoB, you have to delete the approximate DoB first.

Age/Approx DoB

Enter the person's Age or approximate DoB if the actual DoB is not known (later, when the actual DoB is known, you must delete this information and enter the actual date of birth in the Date of Birth field).

Speech Impairment

Click in the box to indicate that the person has a speech impairment.

Hearing Impairment


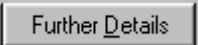
Click in the box to indicate that the person has a hearing impairment.

Visual Impairment


Click in the box to indicate that the person has a visual impairment.

Interpreter Required

Click in the box to indicate that an interpreter is required.

- If you have added or amended any information, click on . The details will be saved and  will become available.

Note: if you make a mistake when entering Frontdesk data refer to Frontdesk – Amending Frontdesk Information section of this manual.

- Click on  to access person details such as other names, addresses, relatives etc.

ADDRESSES AND TELEPHONE NUMBERS

The address for a person will usually be entered during the process of creating their record on Swift, however where the address was not recorded at this stage it can be recorded on this screen.

This screen is also used where a person moves so that Swift retains a record of their old address.

Note: where a client is living permanently in a care home the address that should be recorded is the address of the care home.

Recording Address and Telephone Number

Note: these instructions are only to be used where the person's address and telephone number have not been entered when the person was created. If you wish to change a person's address because of a move refer to *Frontdesk - Changing a Person's Address* section of this manual for instruction.

- Click on **F'sheet** (Frontsheet) and find the client using the guidance *Frontdesk – Finding a Person* section of this manual.
- Click on **Further Details**.

The following screen will be displayed:

- Complete the following fields:

Address Type

Choose the type of address; usually **Home Address**.

Search Address

Click on **Search Address** to find and select the correct address. Refer to *Frontdesk – Finding an Address* section of this manual for instruction.

Start Date

Enter the date the person started occupying the address or the date of referral if this information is not known.

Display Address

If this is the address that should be displayed in the header, click in the box to add the tick.

Household

This field is used to identify whether client lives alone or lives with others and also to record the housing status of clients allocated to a Learning Disabilities team.

Tel. Type


Choose the telephone type for this address.

Tel. No.

Enter the telephone number relating to the address.

Primary Contact No.



This box must be ticked in order for the telephone number to display in the header details.

- Click on .

Changing a Person's Address and Telephone Number

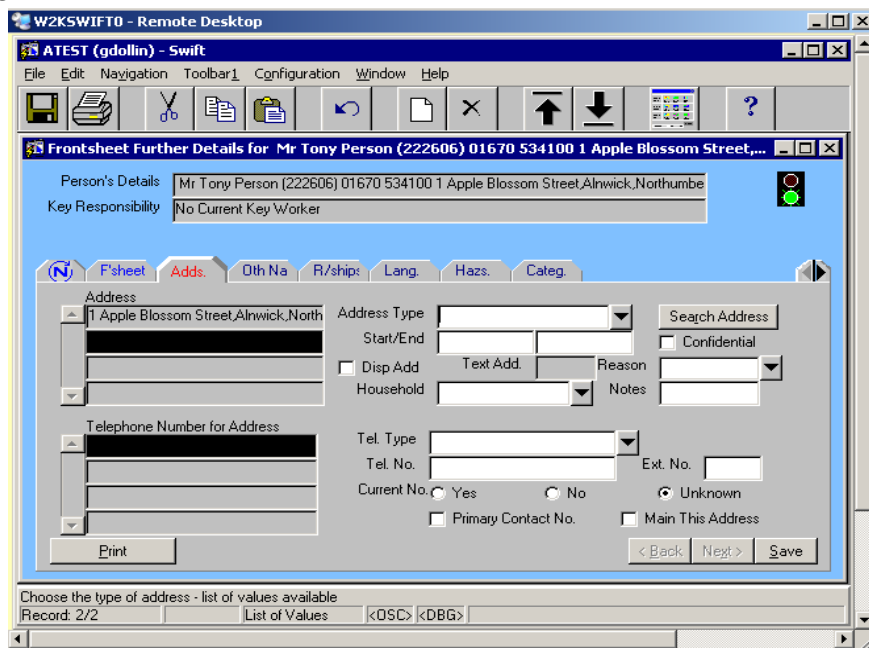
A person's change of address can be entered on the Addresses screen, though the old addresses must be retained for the historic record. If a person moves permanently into a care home their home address should be changed to that of the care home.

If any relatives living at the same address as the person are also moving to the new address, Swift will allow you to change the relatives address at the same time.

- Click on  (Frontsheet).
- Click on .
- In the Address Summary List click on the address the person has moved from.
- Click in the End Date field and enter the date the person moved.

Note: if the person's new address is a care home, and they are likely to visit their old home address for example where their spouse remains in the home, the old address can be left open by leaving this field blank.

- Press 




- Complete the following fields:

Address Type

Choose the type of address; usually **Home Address**.

*Note: address type **Care Address** should be selected if the person is living permanently in a care home.*

Search Address

Click on  and find and select the correct address. Refer to *Frontdesk – Finding an Address* section of this manual for instruction.

Start Date

Enter the date the person started occupying the address or today's date if this information is not known.

Display Address

If this is the address that should be displayed in the header, click in the box to add the tick.

Note: when a person has moved into a care home, the care home address should be ticked to display in the header. When a person's address is being changed a tick must be added here for the new address otherwise their previous address may continue to be the one displayed in the header row.

Tel. Type

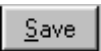
Choose the telephone type for this address.

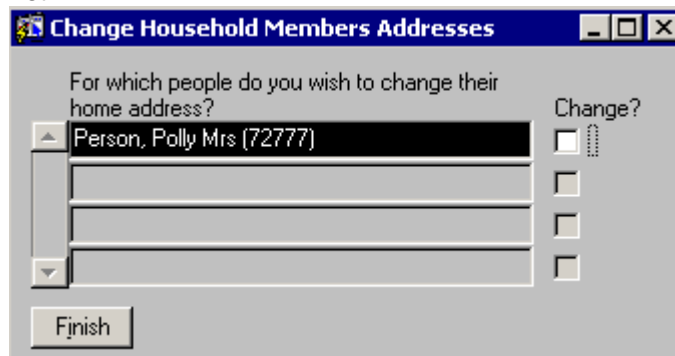
Tel. No.

Enter the telephone number relating to the address.

Primary Contact No.

This box must be ticked in order for the telephone number to display in the header details.

- Click on .
- If there are household members living at the same address you will be prompted with the following checklist.







- Click in the **Change** box for any household members who are also moving to the new address.
- Note: Swift will not update the relative's telephone number; you will need to go into the relative's record to update their telephone number.*

- Click on .

Note: Swift will have automatically ended the previous address if the person has changed their Home address. If you have recorded a Care Address for a person and want to end their Home address you will need to enter an end date against the previous Home address.

Recording An Additional Telephone Number

It is possible to enter more than one telephone number for a household, for example a work telephone number as well as a home number:

- Click on  (Frontsheet).
- Click on .
- In the Address Summary List click on the address where you wish to add an additional telephone number.
- Click in the  summary list.
- Press  to create a new row.
- Complete the following fields:

Tel. Type


Choose the telephone type for this address.

Tel. No.

Enter the telephone number relating to the address.

Primary Contact No.

This box must be ticked in order for the telephone number to display in the header details.

- Click on .

OTHER NAMES

It is possible to record another name against a person so that you can find them easily on Swift. Examples of other names:

- ◇ **Formal Names;** many people prefer to use a different first name than their formal first name, for example Anthony may prefer Tony, and for these people the preferred first name will be used as the main one for the record, with the formal first name entered in the forename field on the Other Name screen.
- ◇ **Aliases;** where the surname is different, or both surname and forename are different.
- ◇ **Previous Name;** where a person may have married and their maiden name is recorded as their previous name.

To record other names:

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **Oth N** (Other Names).

The following screen will be displayed:

The screenshot shows a remote desktop window titled 'W2KSWIFT0 - Remote Desktop'. Inside, the 'ATTEST (gdollin) - Swift' application is open. The 'Frontsheet Further Details for Mr Tony Person (222606) 01670 534100 5 Harpers Lane, Alnwick, Northumberland, NI' window is active. The 'Oth Na' tab is selected. The 'Person's Details' section shows 'Mr Tony Person (222606) 01670 534100 5 Harpers Lane, Alnwick, Northumberland, NI' and 'Key Responsibility: No Current Key Worker'. The 'Oth Na' tab has a sub-menu with 'F'sheet', 'Adds', 'Oth Na', 'R/ships', 'Lang.', 'Habs.', and 'Categ.'. The main form area has a list of 'Surname, First Names (Initials)' on the left and input fields for 'Other Surname', 'Other First Names', 'Other Initials', 'Type of Name' (a dropdown), 'Notes', 'Start Date', and 'End Date'. At the bottom, there are 'Print', '< Back', 'Next >', and 'Save' buttons. A status bar at the bottom reads 'Enter the alternative family name (surname) by which the person is known' and 'Record: 1/1 <OSC> <DBG>'.

- If other names already exist press **F8** to record a new one.
- Complete the following fields:

Other Surname

Enter the alternative family name (surname) the person is known by – or the family name if only the first name is different.

Other First Names

Enter the alternative first names the person is known by – or the formal first name if only the surname is different.

Other Initials

This field will automatically complete when you tab forward after completing the Other First Names field.

Type of Name


Enter the type of name e.g. Formal Name.

Start Date

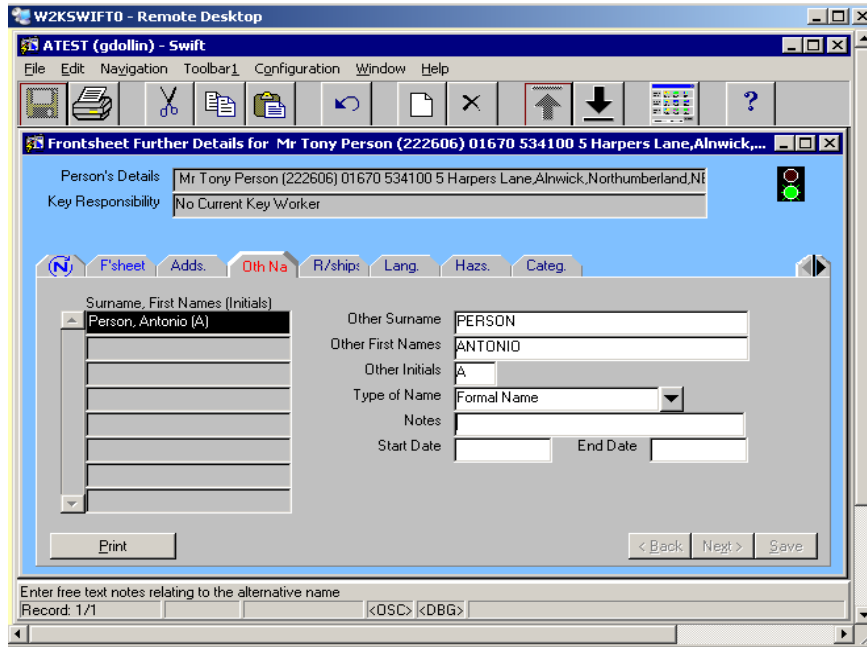
If you wish to record the date the person began using this other name, enter the start date.

End Date

If you wish to record the date the person stopped using this other name, enter the end date.

- Click on 

The following screen will be displayed:



Note: an other name will automatically be generated if the person's name is corrected in Frontdesk Screen and this will need to be deleted. Refer to Frontdesk – Amending Frontdesk Information section of this manual.

RELATIONSHIPS

Details of people connected to the person, such as carers, relatives and neighbours can be recorded on this screen. Before someone can be added in a person's Relationship screen they must themselves be entered on Swift.

Where a relationship is recorded against a person the opposing relationship is created on the other person's record.

Example	If you are recording a father as a relation on Kathy McDonnell's record, the father's relationship screen will be automatically updated with Kathy McDonnell as his daughter.
----------------	---

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **R/ship** (Relationship).

The following screen will be displayed:

- If relationships already exist press **F6** to record a new one.
- Complete the following fields:

Person Name

Carry out a search for the person you wish to record as a relative. For further instruction on searching for a person refer to *Frontdesk – Finding a Person* section of this manual.

Note: if the person you wish to record is not already recorded on Swift you will need to create the person. Refer to *Frontdesk – Creating a Person* section of this manual for instruction. If the relative lives at the same address as the related person, leave their address blank on the create a person screen and instead, click on *Same Address on Creation* field on this screen. Swift will automatically give the relative the same address as the related person.

Address & Tel

The address and telephone number will be blank at this stage.

Note: if you have just created the relative on Swift and the relative lives at the same address as the related person, you may have left the address blank when creating the relative. The

address and telephone number will be blank but by clicking on Same Address on Creation field, Swift will automatically give the relative the same address as the related person.

Relationship

Enter the relationship.

Emergency Contact

Click in the box to indicate that the person being recorded as a relation is the emergency contact.

Next of Kin

Click in the box to indicate that the person being recorded as a relation is the next of kin.

Key Holder

Click in the box to indicate that the person being recorded as a relation is the key holder.

Vuln. Dependant

Click in the box to indicate that the person being recorded as a relation is a vulnerable dependant.

Principal Carer

If this person is the carer, click Yes.

Start Date

This field is optional. If required enter the start date of the relationship.

End Date

If you have opted to enter a Start Date then it is important to remember to insert an end date when appropriate to keep records up to date.

Note: you will only be able to record an end date if a start date has been recorded.

Same Address on Creation

If you have just created the relative on Swift and the relative lives at the same address as the related person, click in the Same Address on Creation field as this will copy the related person's address onto the relatives record.

- Click on

Note: there is a Current Hazard field on this screen which indicates whether or not the related person has a hazard recorded against them however you will not be able to see the hazard details from this screen.

Viewing Relatives Basic Details

From this screen you can view the basic details of a relative.

- Click on the relative whose details you wish to view.
- Click on

The following screen will be displayed:

Swift - W2KSWIFT - Remote Desktop

ATRN (gdollin) - Swift

File Edit Navigation Toolbar Configuration Window Help

Related Persons Details for: Mrs Polly Person (72777) 1 Apple Blossom Street, Ashington, Northumberl... 2

Person's Details Mrs Polly Person (72777) 1 Apple Blossom Street, Ashington, Northumberland, NE63 2

Key Responsibility No Current Key Worker

Back Details

Surname PERSON Date Of Birth 09-MAY-1955 Hearing Impairment

First Names POLLY Age 52 yrs 8 mth Interpreter Required

Initials P Age/Approx DOB Speech Impairment

Title Mrs Expected DOB Visual Impairment

Gender Female Age Group Main Language

Marital Status Self Defined Date Of Death

Ethnic Origin Religion

Print < Back Next > Save

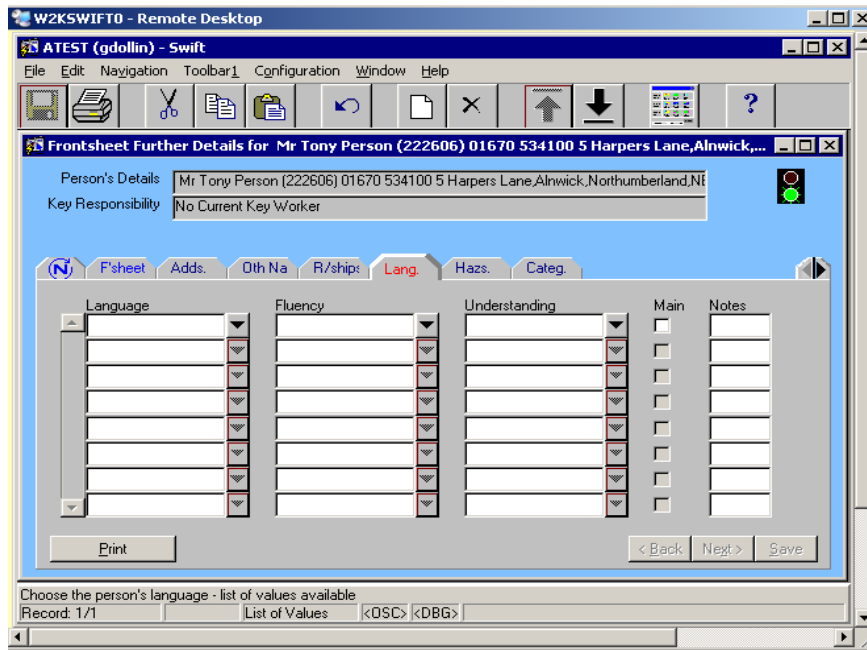
- To return to the Relationships screen click on [Back](#)

LANGUAGES

This screen can be used to record whether a person speaks a language other than English and their level of fluency in that language.

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **Lang.** (Languages).

The following screen will be displayed:



- If languages already exist press **FG** to record a new one.
- Complete the following fields:

Language
Enter the language.

Fluency
Enter fluency.

- Click on **Save**.

HAZARDS

A hazard warning light can be set up on a person's Swift record to let workers know that there is important information on the client file which they should see before they visit. The warning light is displayed in the top right of the corner of the screen and the default is green which changes to red if a hazard is recorded.

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **Hazs.** (Hazards).

The following screen will be displayed:

Hazard	Recorded By	Date Of Incident	End Date	Notes

- Press F6 and complete the following fields:

Hazard:

Select "See Hazards Notes field" from drop down menu (only option available).

Recorded By:

Will automatically complete with the name of the person logged on.

Date of Incident:

Enter the actual date of incident, if known, or today's date.

End Date:

Enter the date from which Hazard no longer applies.

Notes:

Enter a brief description of the Hazard (e.g. carer has experienced aggressive and threatening behaviour from the client) and summary of the Risk Management Plan (e.g. Do not visit alone). There is a limit of 2000 characters for this note.





- Click on **Save**.

Note: once you return to Frontsheet, the hazard warning light will be displayed as red.

PAPER FILE LOCATION

There is the facility on Swift to record where the manual file for the client is held. It is possible to record the location of the main file and any non main files, therefore there may be more than one paper file location recorded for the same person at one time.

Recording Paper File Location

- Click on  (Frontsheet).
- Click on .
- Click on  (Paper File Location)
- If there are previous file locations recorded for this file, check that they have been ended.
- Press  to record a new location.
- Complete the following fields:

File ID

If there is a file ID, for example a Datastor ID or a box number/location for a file in Modern records, enter it here.

Note: for files archived to Modern Records this information will usually be added at a later date as Modern Records provide this after they receive the file. The format for Modern Records file IDs is box number/location number, e.g. 52/75 indicates box 52 in location number 75.

Resp Unit

If this is the main file, enter the key team responsible for the case. If this is **not** the main file, enter the team responsible for this paper file. Refer to *Frontdesk – Finding an Organisation* section of this manual.

Norm Loc

Enter the office where the file is to be held, e.g. Hexham District Office; Datastor; Modern Records.

Opened

If this is a new file enter the date the file was opened, e.g. the referral date. If this is an existing file that has been transferred to a different office, enter the date the file was placed in this new location.


Notes

Type in one of the following where appropriate:

- ◇ Central Misc Paper Folder.
- ◇ Central Blue Badge Folder.

Main File

If this is the main file, click in the box, otherwise leave it blank.

- Click on .

The following screen will be displayed:

The screenshot shows the 'Frontsheet Further Details for Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb...' window. The 'Paper File ID & Location' section is active, displaying the following fields:

- File ID: [Empty]
- Subject: [Empty]
- or Loc. Text: [Empty]
- Closed: [Empty]
- Retention: [Empty]
- Archived: [Empty]
- Resp. Unit: Bondgate/Felton (Team)[11532]
- Norm. Loc.: Bondgate Surgery
- Opened: 01-APR-2006
- Review: [Empty]
- Destruction: [Empty]
- Main File: [Checked]
- Notes: [Empty]

Below the form is a table with the following columns: Requested, By, Sent, Location, Loc. Text, Returned. The table is currently empty.

At the bottom of the window, there is a status bar with the text: 'Is this the main paper file for the person?' and 'Record: 1/1'.

Ending the Paper File Location

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **P Files** (Paper File Location).
- Complete the following fields:
 - Closed**
Enter the date the case was closed or, if the file is being transferred to another office, the date of transfer.
- Click on **Save**.
- If the file is being transferred to Modern Records or to Datastor for storage you will need to record the new paper file location. Refer to *Frontdesk – Paper File Location – Recording Paper File Location* section of this manual.

Transferring a Paper File to a new File Location

When a case is transferring and the paper file is being transferred to another office, the originating office is responsible for ending the current paper file location and recording the details of the request for transfer. It is the responsibility of the **receiving** office to record the date it was received and the new paper file location.

Recording a Request for File Transfer

It is the responsibility of the originating office to end the current paper file location and record details of the request for transfer.

- Click on **P Files** (Paper File Location).
- Complete the following fields:
 - Closed**
If the case is still open enter the date the file request was made.
 - Requested**
Enter the date the file request was made.

By


Enter the name of the person or team who is requesting the file.

Location

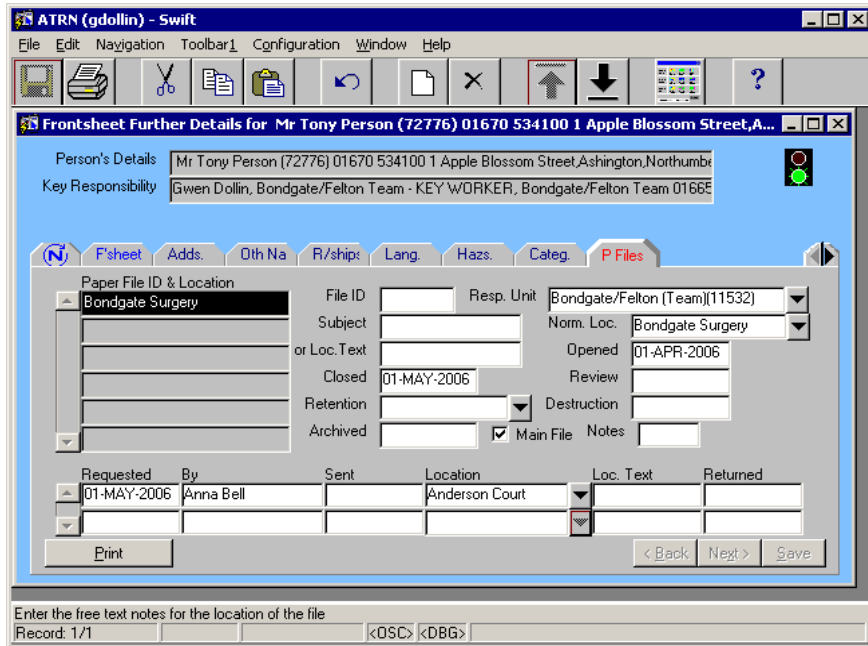
Enter the office who has requested the file.

Returned

If the file is to be returned enter the expected date of return.

- Click on 


The screen may look something like this:



The screenshot shows the 'ATRN (gdollin) - Swift' application window. The main window title is 'Frontsheet Further Details for Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, A...'. The 'Person's Details' section shows 'Mr Tony Person (72776) 01670 534100 1 Apple Blossom Street, Ashington, Northumb...' and 'Key Responsibility' as 'Gwen Dollin, Bondgate/Felton Team - KEY WORKER, Bondgate/Felton Team 0166E'. The 'Paper File ID & Location' section is active, showing a list of locations with 'Bondgate Surgery' selected. The form fields include: File ID (empty), Subject (empty), or Loc. Text (empty), Closed (01-MAY-2006), Retention (empty), Archived (empty), Resp. Unit (Bondgate/Felton [Team] [11532]), Norm. Loc. (Bondgate Surgery), Opened (01-APR-2006), Review (empty), Destruction (empty), and a checked 'Main File' box. A table below shows a record for '01-MAY-2006' requested by 'Anna Bell' at 'Anderson Court'. The bottom of the window has a text area for 'Enter the free text notes for the location of the file' and a status bar showing 'Record: 1/1'.

Recording the File has been Received

It is the responsibility of the receiving office to record the receipt of a file and the new file location.

- Click on  (Paper File Location).
- Click in the Paper File ID & Location summary list on the location where the file is originating.
- Complete the following fields:

File Id

If the file is received from Datastor, a number will already be entered in this field. Make a note of the File ID, as you need to enter it in the notes field, and then delete it from this field.

Notes


If the file is received from Datastor, enter the box number deleted from File ID field.

Sent

Enter the date that you **received** the file.

- Click on 

The screen may look something like this:

- Press  and record the new file location. Please refer to Frontdesk – Paper File Location - Recording Paper File Location section of this manual.

Note: if there is a delay in transferring the file and the new team responsible for the case accrues paperwork before the main file has been transferred, the new team should record an additional file location, not ticked as Main, to show that paperwork is currently being held in two offices.

Once the main file has been transferred and the originating office has updated Swift, the new team should merge all paperwork into one file, delete the temporary non main file location and record the file has been received. Refer to Frontdesk – Paper File Location – Transferring a Paper File to a New File Location – Recording the File has been received section of this manual.

Transferring a Paper File into Storage

When a file is transferred to a storage area, e.g. to Modern Records or to Datastor, it is the responsibility of the originating office to end the current paper file location and record the new file location. Refer to *Frontdesk – Paper File Location – Ending the Paper File Location* and *Frontdesk – Paper File Location – Recording Paper File Location* sections of this manual.

Note: when a non main file is sent to Modern Records, the office transferring the file must send written notification to inform the relevant district office that the case does have another file associated with it and that it is in Modern Records.

This written notification will then be placed on the main file so that anyone looking at that file will be aware of the existence of the file in Modern Records.

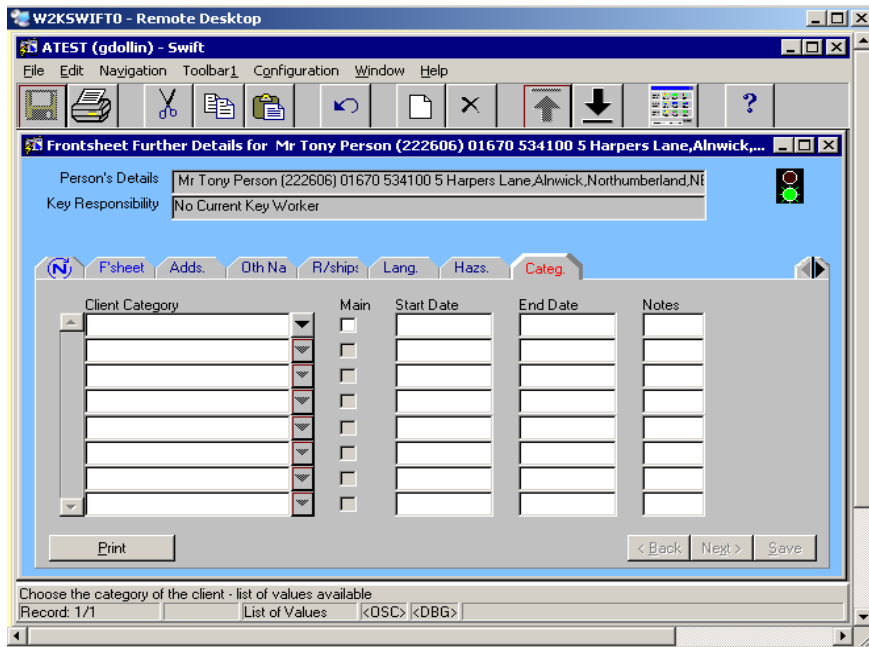
CATEGORY

This screen is used for recording:

- ◇ Care Programme Approach (CPA) level for a client.
- ◇ Where a Carer does not wish to receive information about carer events and news.
- ◇ Where a client needs to remain anonymous on Swift. A category of “Pseudonymous Client“ is entered. For further information on recording confidential clients on Swift, contact the Systems Support Help Line on 01670 534100.
- ◇ Other details, such as information for clients allocated to a Learning Disabilities team.

- Click on **F'sheet** (Frontsheet).
- Click on **Further Details**.
- Click on **Categ.** (Category).

The following screen will be displayed:



- If categories already exist press **F6** to record a new one.
- Complete the following fields:

Client Category

Enter the appropriate category.

Start Date

Enter the start date.


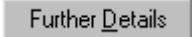

End Date

Enter the end date, if relevant.

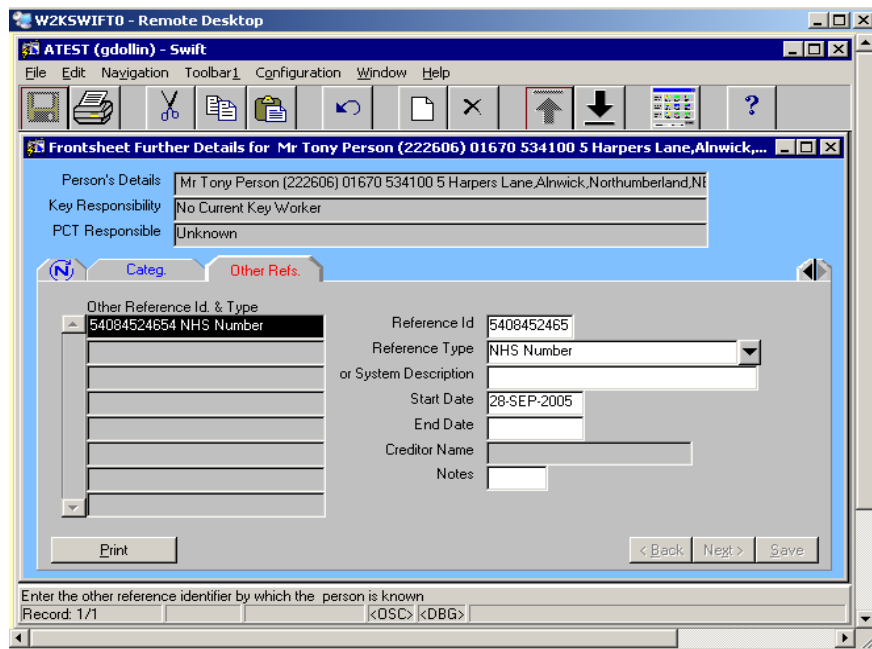
- Click on **Save**

OTHER REFERENCES

This screen is used to view and record other references the client may have, e.g. NHS number.

- Click on  (Frontsheet).
- Click on .
- Click on  (Forward Scroller).

The following screen will be displayed:



W2KSWIFT0 - Remote Desktop

ATEST (gdollin) - Swift

File Edit Navigation Toolbar_1 Configuration Window Help

Frontsheet Further Details for Mr Tony Person (222606) 01670 534100 5 Harpers Lane, Alnwick, Northumberland, NI

Person's Details: Mr Tony Person (222606) 01670 534100 5 Harpers Lane, Alnwick, Northumberland, NI

Key Responsibility: No Current Key Worker

PCT Responsible: Unknown


Other Refs

Other Reference Id. & Type	Reference Id	Reference Type	or System Description	Start Date	End Date	Creditor Name	Notes
54084524654 NHS Number	5408452465	NHS Number		28-SEP-2005			

Print < Back Next > Save

Enter the other reference identifier by which the person is known

Record: 1/1 <OSC> <DBG>

- If other references already exist press  to record a new one.
- Complete the following fields:

Reference Id

Enter the appropriate identifier.

Reference Type

Enter the appropriate reference type.

Start Date

Enter the start date.

ENTERING A REFERRAL

The action to be taken on Swift when someone is referred depends on whether or not the person has a key worker.


- ◇ Key worker/key team already recorded on Swift – do not enter a referral, a contact note should be recorded instead. Refer to the *Contact Notes* manual.
- ◇ Disabled Person's Car Badge only – no referral needs to be entered if the person is being recorded on Swift solely for this purpose.
- ◇ Registrations – no referral needs to be entered if the person is being recorded on Swift solely for this purpose.
- ◇ No key worker/key team on Swift – if a client does not have a key worker/key team and needs a service other than a car badge or registration then a referral should be recorded.

There are three screens to complete to record a referral:

- ◇ Contacts Screen – to record the contact date, source type etc.
- ◇ Referral Screen – to enter the referral date.
- ◇ Involvements Screen – to enter the GP practice if it is not already recorded and to record the team the case is being allocated to.

Completing the Contacts Screen

The Contacts screen is only used to record the contact details where the contact results in a referral. It is not possible to record a referral without first entering the contact details on the Contacts screen.

- Click on  (Contacts).
- Check whether the person has a key worker by referring to the Key Responsibility field in the header at the top of the screen.
- If the person has a key worker/key team do not proceed with the referral but refer to the *Contact Notes manual – Recording a Contact Note* section to record the details of the contact.
- If no key worker is involved you can proceed with entering the referral.

The following screen will be displayed:

- Complete the following fields:

Contact Date

Enter the date of initial contact.

Note: this field will default to today's date. If the contact date is not today's date you will need to delete the date already entered before entering the correct date.

Source Type

This information must be completed. Enter the appropriate Source Type.

Source Org

This information is only mandatory when the source organisation is a hospital. Refer to *Frontdesk – Finding an Organisation* section of this manual.



*Instead of using the drop down box a quick way to bring up a list of hospitals is to type in **Hosp** and then press the tab key. This will produce a list of hospitals from which you can make your selection.*

Text

If the person who made the initial contact is a professional you may record their name in this field if you feel that it would be useful.

Receiving Team


This will automatically default to the team of the person who is recording the referral and does not need to be changed even if you are entering the referral on behalf of someone from another team.

Worker

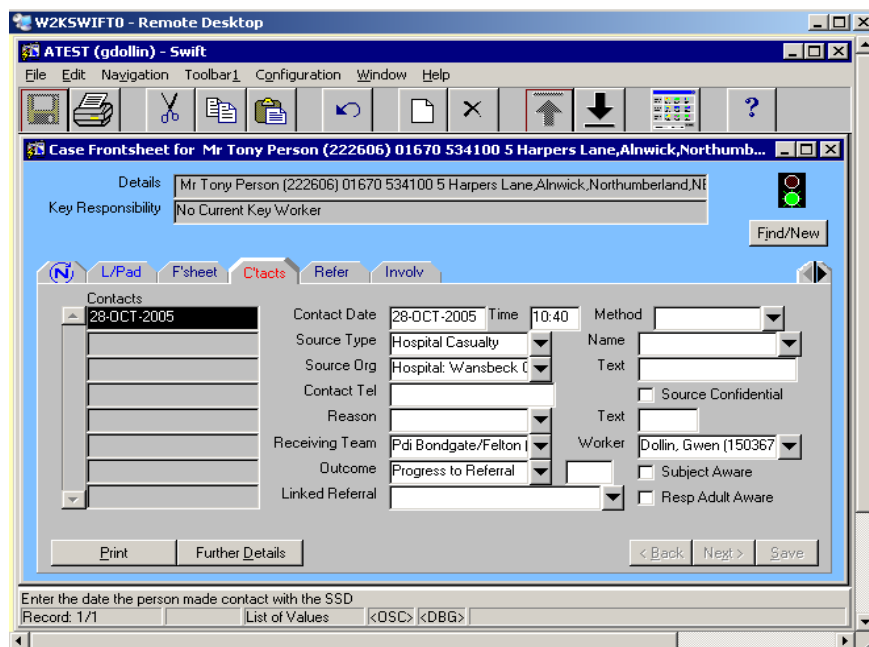
This will automatically default to the name of the person who is recording the referral and does not need to be changed even if you are entered the referral on behalf of someone else.

Outcome

Enter the appropriate Outcome.

- Click on 

The completed screen should look something like this:



Completing the Referral Screen

After the Contact has been recorded the Referrals screen needs to be completed. It is not possible to record a referral without first entering the contact details on the Contacts screen.

- Click on **Refer** (Referrals).

The following screen will be displayed:

- Complete the following fields:

Date Referred

Enter the date the CM1 form was completed.

Team Resp

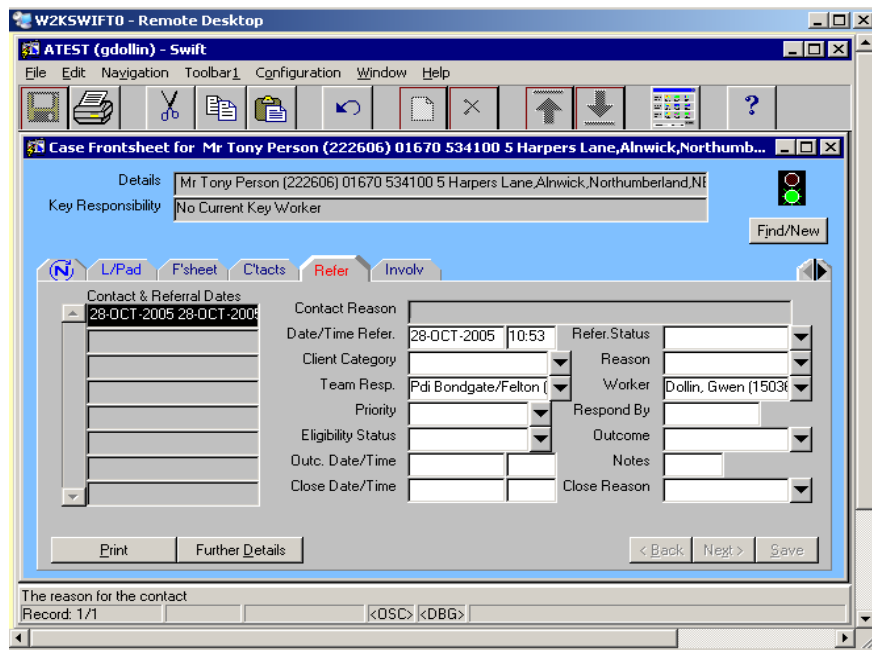
The receiving team entered on the Contacts screen will be carried forward to this field and should not be changed.

Worker

The worker entered on the Contacts screen will be carried forward to this field and should not be changed.

- Click on **Save**.

The completed screen should look something like this:

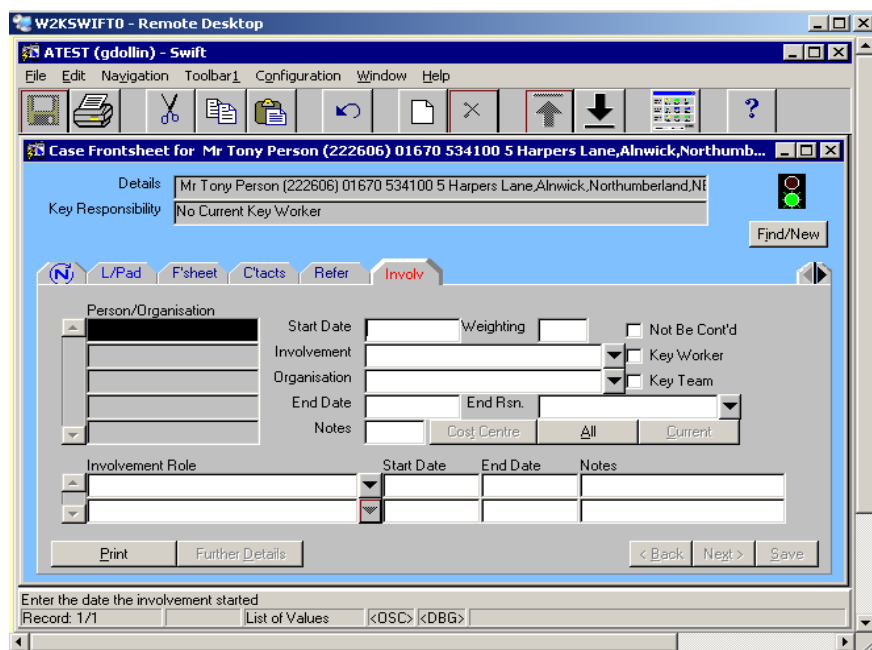


Completing the Involvements Screen

The client's GP Practice and the key team need to be recorded on the Involvements screen and these are the last two pieces of information in order to complete the recording of a referral on Swift.


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

The following screen will be displayed:



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 .
- 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	GPN for a practice in the North area of the County. GPC for a practice in Central area of the County. GPS for a practice in the South area of the County. GPW for a practice in the West area of the County. GPO for a practice that is not in Northumberland but is in the surrounding areas i.e. North Tyneside.
----------------	---


*Note: if the practice is out of the area, i.e. not in Northumberland or the surrounding areas then a fictitious practice named **GP* Out of Area** has been set up so that this fact can be recorded on Swift.*

- For further instruction on searching for organisations refer to *Frontdesk – Finding an Organisation* section of this manual.

*Note: there should be no clients with a current or previous referral on Swift who are without a GP practice recorded as an involvement. A fictitious GP Practice named **GP* Not Registered** has been set up so that people who are not registered can have this fact recorded in Swift.*


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 .

Recording Key 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. This team involvement is to be left open alongside any key worker involvement that may be added at a later date.

- Press .
- Complete the following fields:

Start Date

Enter the date the referral was made.

Involvement

Ignore this field as team involvement is recorded in the Organisation field.


Organisation

Enter the team the case is being allocated to. For instruction on searching for organisations refer to *Frontdesk – Finding an Organisation* section of this manual.

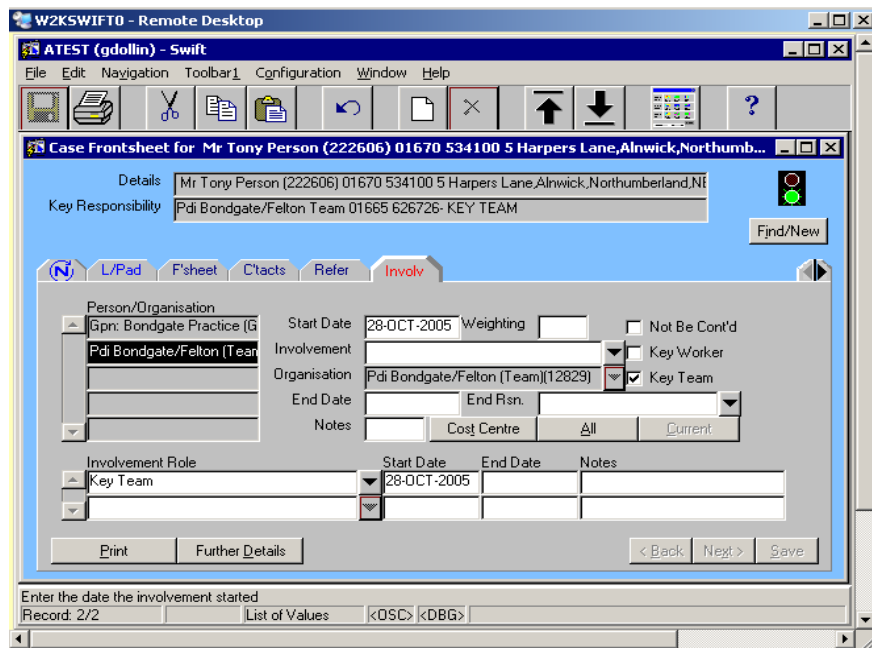
Note: searching by short name is the quickest way to find a team. The short name is the cost centre code of the team.

Key Team

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 should look something like this:



Recording Key Worker Involvement

Once the Team Manager decides who the case is to be allocated to, the key worker should be recorded on Swift.

- Press .
- Complete the following fields:

Start Date

Enter the date the case was allocated to the key worker.

Involvement

Enter the worker who the case is being allocated to. Refer to *Frontdesk – Finding a Person* section of this manual for further instruction.

Organisation

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

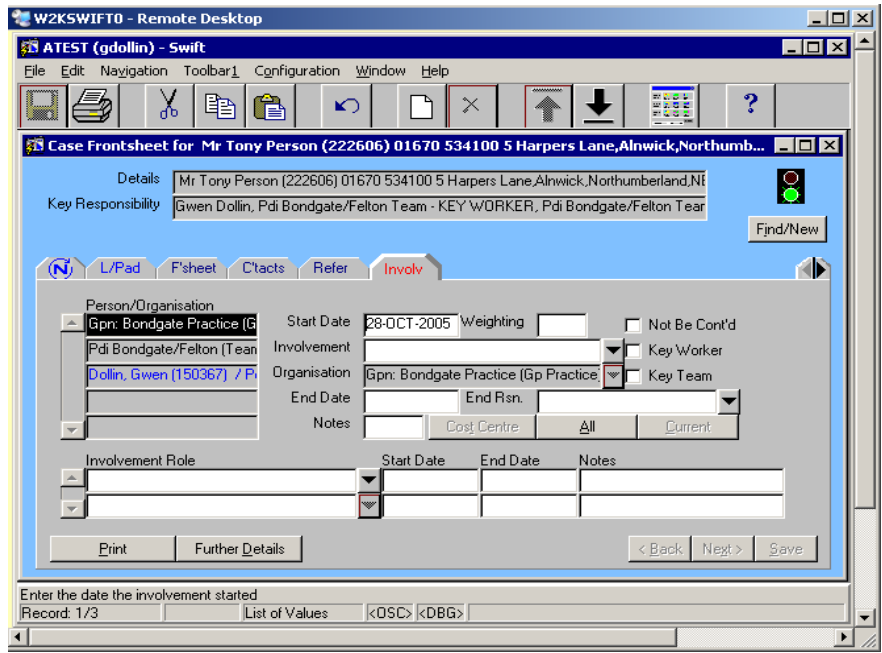
Key Worker

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 .

Swift - Frontdesk - Entering a Referral

The completed screen should look something like this:



INVOLVEMENTS

As well as GP Practice, key team and key worker, other professional involvements can be recorded on Swift. An involvement can be a person or an organisation and the reason for Involvement may be entered as an Involvement Role.

Note: Financial Agent may be recorded on the Involvements screen. A Financial Agent could be a relative of the client or the client themselves.

Recording Involvements

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

The following screen will be displayed:

People who are recorded as an involvement are displayed in blue coloured text and organisations are displayed in black coloured text in the summary list

- Press **FG**.
- Complete the following fields:

Start Date

Enter the date the involvement started.

Involvement

If the involvement you are entering is a person complete this field. Refer to *Frontdesk – Finding a Person* section of this manual for further instruction.

Note: if you cannot find the professional person who you wish to record on Swift, contact the Systems Support Help Line on 01670 534100

Organisation

If you have entered a person in the Involvement field, the organisation they work for will automatically appear here. If you wish to record an organisation rather than a person, enter the organisation in this field. Refer to *Frontdesk – Finding an Organisation* section of this manual for further instruction.


Note: if you cannot find the organisation that you wish to record on Swift, contact the Systems Support Help Line on 01670 534100

Involvement Role

Enter the relevant involvement role.

Start Date

Enter the date the involvement started.

- Click on 

Viewing Involvements

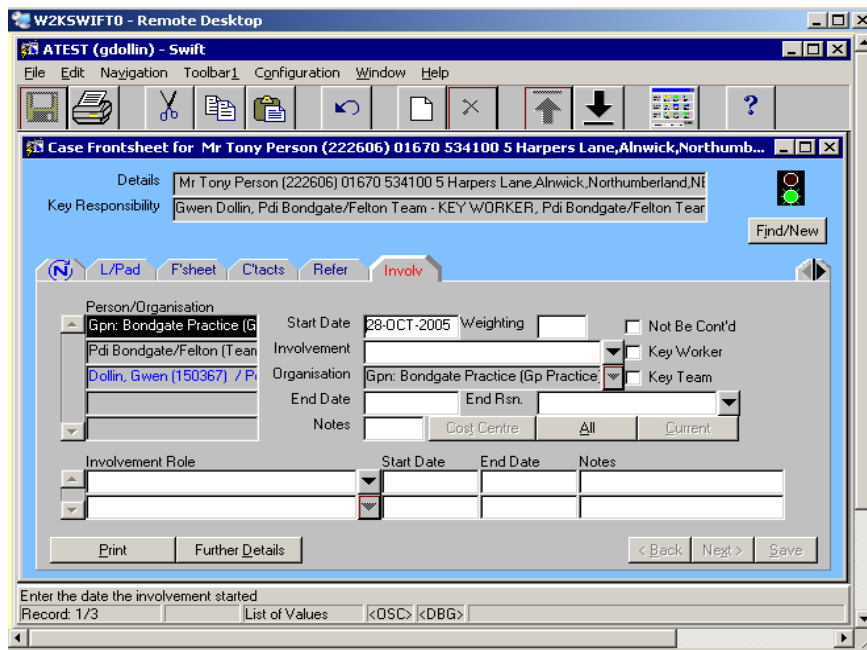
A client may have many involvements recorded on their Involvements screen and Swift displays them in the order that the involvement started. The most recent involvement will be displayed at the top of the summary list and the oldest involvement will be at the end of the list. They remain in this order even when an involvement is ended.



Swift automatically displays only current involvements in the summary list however you can display all involvements.

Swift shows you all current and closed involvements in the summary list however there is a way to display only current involvements.

- Click on  (Involvements).

The following screen will be displayed:



- To view all involvements including those with an end date click on 
- To view only current involvement click on . The summary list will then only display involvements that have no end date entered.

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.

Note: if an involvement is ending because a client's case is being closed you must refer to Frontdesk – Closing a Case on Swift section of this manual for further instruction.

- Click on  (Involvements).

The following screen will be displayed:

W2KSWIFT0 - Remote Desktop

ATEST (gdollin) - Swift

File Edit Navigation Toolbar1 Configuration Window Help

Case Frontsheet for Mr Tony Person (222606) 01670 534100 5 Harpers Lane, Alnwick, Northumb...

Details Mr Tony Person (222606) 01670 534100 5 Harpers Lane, Alnwick, Northumberland, N...

Key Responsibility Gwen Dollin, Pdi Bondgate/Felton Team - KEY WORKER, Pdi Bondgate/Felton Tear

Find/New

(N) L/Pad F'sheet C'tacts Refer Involve

Person/Organisation

Gpn: Bondgate Practice (G Start Date 28-OCT-2005 Weighting Not Be Cont'd

Pdi Bondgate/Felton (Tea Involvement Key Worker

Dollin, Gwen (150367) / P Organisation Gpn: Bondgate Practice (Gp Practice) Key Team

End Date End Rsn.

Notes Cost Centre All Current

Involvement Role	Start Date	End Date	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Print Further Details < Back Next > Save

Enter the date the involvement started

Record: 1/3 List of Values <OSC> <DBG>

- 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

Note: any involvement role entered will be automatically ended.

TRANSFERRING A CASE

When a case transfers from one key worker to another, or from one key team to another, information will need to be updated on one or more screens on Swift. Exactly how much needs to be updated will depend on whether the client is transferring to a different team and whether the client is receiving any costed services.

Both the **transferring team** and the **receiving team** and must liaise to ensure that Swift is updated correctly.

Transfer Within the Same Team

If the case is staying with the same team but is transferring to a different key worker, you need to update the Involvements screen:

Involvements Screen

- End the involvement of the existing key worker. Refer to *Frontdesk – Involvements – Ending Involvements* section of this manual for guidance.
- Record an involvement for the new key worker. Refer to *Frontdesk – Involvements – Recording Involvements* section of this manual for guidance.

Transfer to Another Team – Transferring Team Actions

When a case transfers from one team to another the **transferring team** must carry out the following update on Swift:

Involvements Screen

- End the involvement of the existing key worker. Refer to *Frontdesk – Involvements – Ending Involvements* section of this manual for guidance.
- Record a new involvement for the **receiving team** but do not tick the Key Team field. Refer to *Frontdesk – Involvements – Recording Involvements* section of this manual for guidance.
- Remove the tick out of the Key Team field against the **transferring team's** involvement but do not record an end date.

Paper File Location Screen

- End the current Paper file location. Refer to *Frontdesk – Paper File Location – Ending the Paper File Location* section of this manual for guidance.
- Record the details of the request for transfer. Refer to *Frontdesk – Paper File Location – Recording a Request for File Transfer* section of this manual for guidance.

Costed Packages of Care

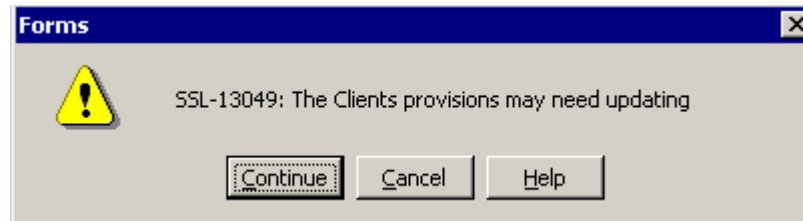
- All updates to CPC should be carried out by the **receiving team**, therefore no action is necessary by the **transferring team**.


Transfer to Another Team – Receiving Team Actions

The **receiving team** must carry out the following update on Swift to complete the transfer of a case:

Involvements Screen

- Enter a tick in the **Key Team** field against the **receiving team's** involvement. At this point the following message will appear:



- Click on 
- Enter an end date against the transferring team.
- Record an involvement for the new key worker. Refer to *Frontdesk – Involvements – Recording Involvements* section of this manual for guidance.

Paper File Location

- Record the date the file was received. Refer to *Frontdesk – Paper File Location – Recording that a File has Been Received* section of this manual for guidance.
- Record a new paper file location . Refer to *Frontdesk – Paper File Location – Recording Paper File Location* section of this manual for guidance.

Costed Packages of Care

If the client is receiving costed services, the cost centre must be changed to that of the new team.

For each ongoing service in CPC you must:-

- Record an end date of the day before the transfer on the Schedule/Non Schedule screen, to end the costs for the **transferring team's** cost centre.
- Record a new scheduled/non scheduled service, with the new **receiving team's** cost centre, starting on the day of the transfer.
- You will need to send any new schedules recorded for authorisation.

Refer to the *Costed Packages of Care manual – Transferring Cases* section of the manual for guidance.

CLOSING A CASE

To close a case on Swift, information on several Swift screens/modules may need to be closed depending upon the reason for case closure. Please ensure that you refer to the relevant section below as it is essential that information elsewhere in Swift is updated to reflect case closure.

Closing a Case Due to Death of Client

When a client dies, all areas of Swift must be closed. The following section details the screen/module that should be closed and where instructions on closing the information are held;

Information to be Closed	Where to Find Instructions	Additional Notes
Frontsheet	<i>Frontdesk – Closing a Case – Recording Death of Client</i>	
Referral	<i>Frontdesk – Closing a Case - Closing Referral Details</i>	
Involvements other than key worker or key team	<i>Frontdesk – Involvements – Ending Involvements</i>	
Hazards	<i>Frontdesk – Hazards</i>	
Paper File Location	<i>Frontdesk – Paper File Location – Ending the Paper File Location</i>	
Costed Packages of Care	<i>Costed Packages of Care – Ending Services</i>	<i>Services are automatically ended when a date of death is entered on Frontsheet</i>
Reviews	<i>Assessments and Reviews – Deleting a Review</i>	
Legal Status	<i>Legal Status – Ending a Legal Status</i>	
Registrations	<i>Person's Registrations – Ending a Person's Registration</i>	
Disabled Person's Car Badge	<i>Blue Badges – Closing a Blue Badge</i>	
Key Worker and key team Involvements	<i>Frontdesk – Involvements – Ending Involvements</i>	<i>The key worker and key team involvements must be the last thing closed on the client's record</i>



Closing a Case for Reason Other than Death

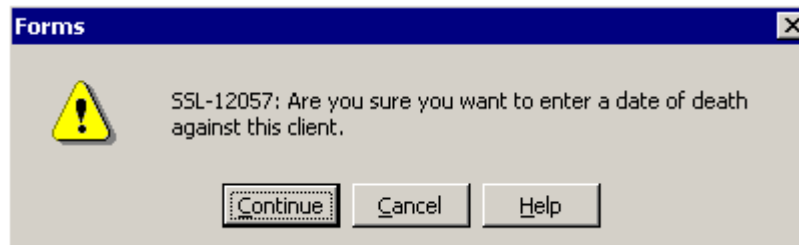
Depending upon the reason for closure, some areas of Swift may need to remain open. For example a client's involvement with a key worker may end, however they may still be registered Blind and have a Disabled Persons Car Badge. The registration and car badge may only be closed when the client dies or moves out of the area. The following section details the screen/module of Swift that may need to be closed and where instructions on closing the information are held;


Information to be Closed	Where to Find Instructions	Additional Notes
Referral	<i>Frontdesk – Closing a Case – Closing Referral Details</i>	
Involvements other than key worker or key team	<i>Frontdesk – Involvements – Ending Involvements</i>	<i>If the person has a current car badge or registration then the GP Practice must remain open</i>
Hazards	<i>Frontdesk – Hazards</i>	<i>If the hazard remains</i>

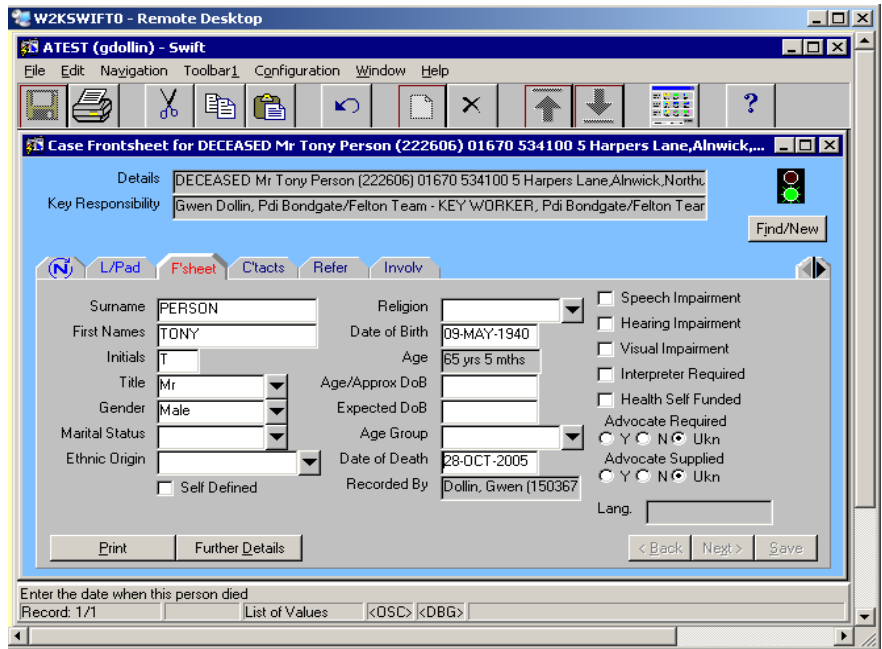
		<i>relevant, even though the case is closing, do not enter an end date. Refer to your Team Manager for advice about whether a hazard should be closed or whether it should remain open.</i>
Paper File Location	<i>Frontdesk – Paper File Location – Ending the Paper File Location</i>	
Costed Packages of Care	<i>Costed Packages of Care – Ending Services</i>	
Reviews	<i>Assessments and Reviews – Deleting a Review</i>	
Legal Status	<i>Legal Status – Ending a Legal Status</i>	
Registrations	<i>Person's Registrations – Ending a Person's Registration</i>	
Disabled Person's Car Badge	<i>Blue Badges – Closing a Blue Badge</i>	
Key Worker and key team Involvements	<i>Frontdesk – Involvements – Ending Involvements</i>	<i>The key worker and key team involvements must be the last thing closed on the client's record</i>

Recording Death of Client

- Click on  (Frontsheet).
- Click in the Date of Death field and enter the date the client died.
- Click on . The following message will appear:



- Click on .
The following screen will be displayed:



The name of the person who entered the date of death is entered in the Recorded By field. The word "DECEASED" now displays before the name in the header details.

Note: Frontsheet now displays that the client is deceased however other details in Swift such as involvements, reviews etc. must be closed off. Costed Packages of Care (CPC) will be automatically closed off on the date of death, if services ended earlier than the date of death, CPC will need to be amended to reflect this.

Closing Referral Details

- Click on **Refer** (Referrals).

The following screen will be displayed:

Note: the referrals screen may have a number of referrals displayed in the summary list, though only the top one should be open i.e. have no Closed Date recorded.

- In the Contact & Referral Dates summary list, click on the referral that needs to be closed.
- Click in Closed Date field and enter the date.
- Enter the relevant Close Reason.
- Click on **Save**.

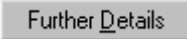

Note: the referral is now closed however you may need to close off other details in Swift such as involvements, services in Costed Packages of Care (CPC) etc. if you have not already done so.

AMENDING FRONTDESK INFORMATION

Most of the information in Frontdesk can easily be corrected if an error has been made during input or data has later been found to be incorrect. As a general guide all you need to do is locate the information that needs to be corrected, amend it and then save it.

Note: the following guidance notes only relate to correcting errors however if you need to update information, for example change a person's address, you should refer to the relevant section of this manual for guidance. If you need information deleted refer to Frontdesk – Deleting Frontdesk Information section of this manual for instruction.


To correct Frontdesk information follow these guidelines:

- Go to the screen that has the details recorded that you wish to amend. You may need to click on  to access this information.
- Amend the information:
 - ◇ if the field containing the error is a free text field, i.e. it can be typed over, click into the field and type in the correct information.
 - ◇ if the field containing the error is a drop down box list, reselect the correct option from the list.
 - ◇ If the field containing the error is a drop down box search, carry out a search to find the correct information.
 - ◇ if a checkbox is not completed correctly, click into it to add or remove the check mark as appropriate.
- Click on .


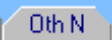


The data should now be saved and therefore reflect the correct information.

Amending a Persons Name

If a mistake has been made when entering a person's name or the spelling is not correct, this can be amended in Swift. Amending a person's name in Frontsheet will automatically generate a record of the original name as an Other Name (or alias). It is important that once you have amended the name you delete the original name that is automatically entered in the Other Names screen.

- Find the person – refer to *Frontdesk – Finding a Person* section of this manual.
- Click into the Surname or First Names field and amend as necessary.
- Click on .

Note: the original name has now been recorded as an other name and must be deleted if it was purely an error in the first place.

- Click on .
- Click on  (Other Names).
- Click on the original name.
- Click on  (Delete) on the tool bar.
- Click on . (The Other Name has now been deleted and the person is entered under their correct name).

DELETING FRONTDESK INFORMATION

There are times when information in Frontdesk needs to be deleted due to an input error. Where an error has been made please refer to the following sections for instruction on deleting the information.



Deleting Frontsheet Information

Information held in Frontsheet Further Details such as Other Names, Relations can be deleted if they have been entered in error.

As a general guide all you need to do is locate the information that needs to be deleted, delete it and then save it.

Note: information should only be deleted when it has been entered in error. Never delete information if it was accurate but no longer applicable such as a client's previous home address, as this information needs to be retained for the historic record.

To delete Frontdesk information follow these guidelines:

- Go to the screen that has the details recorded that you wish to delete.
- Click in the summary list on the entry you wish to delete. You must take care to ensure that you click on the entry that you want to delete otherwise you may delete something that you wish to retain.
- Click on  (Delete) on the toolbar.
- Click on .

The information you wished to delete should no longer be displayed on the screen.

Deleting Referral Information and Involvements

If you wish to delete a Contact, Referral or Involvement in Frontdesk please contact the Systems Support Help Line on (01670) 534100 who will delete the information on your behalf.

Deleting Client Record

If a client has been recorded in error and you wish to delete the whole client record please contact the Systems Support Help Line on (01670) 534100 who will delete the information on your behalf.

CARERS PROCEDURE

Recording a Carer

When recording a carer on Swift certain information needs to be recorded on the client's Swift record and the carer's Swift record.

Relationship Screen – Client Record

- The carer should be recorded as a relative of the client on the client's Relationship screen and the Principal Carer Yes box must be ticked.
- More than one person can be identified as Principal Carer.
- Refer to *Frontdesk – Relationships* section of this manual for guidance.

Addresses and Telephone Numbers Screen – Carer's Record

- To make it easier to identify the person as a carer go to the Tel. No. field and enter **(Carer)** after the telephone number. Ensure there is a tick in the Primary Contact Number box so that this will then appear in the Header details of most Swift screens.
- If there is no telephone number recorded you can still enter **(Carer)** but you will also need to enter a Tel. Type of Home and place a tick in the Primary Contact Number box.
- Refer to *Frontdesk – Addresses and Telephone Numbers* section of this manual for guidance.

Category Screen – Carer's Record

- If the carer has indicated that they do not wish to receive information concerning local events and carer news then a category of **Carer not on mailing list** must be entered on this screen.
- Refer to *Frontdesk – Category* section of this manual for guidance.

Involvement Screen – Carer's Record

- If a carer's assessment has been carried out, the care manager who carried out the assessment should be recorded as the key worker for the carer and the team the care manager works for must be recorded as key team.
- Carers who have a key worker/key team will appear on Swift caseload lists.
- Refer to *Frontdesk – Involvements – Recording Involvements* section of this manual for guidance.

Reviews Screen – Carer's Record

- If the carer has requested a separate review rather than having a review at the same time as the client, a **Carer review** must be entered on Swift.
- The care manager will receive the usual Review workflow job to indicate there is a review to carry out.
- Refer to the *Assessments and Reviews manual – Recording a Review* for guidance.

Contact Notes – Client and Carer's Record

- When a care manager carries out a carers assessment a contact note must be entered onto both the carer's and client's record using a note type of **Carer assessment completed**.
- When a carer declines an assessments the **Carer assessment declined** note type may be used however the use of this contact note type is entirely optional.
- Refer to the *Contact Notes manual – Recording a Contact Note* for guidance.

Carer Becomes a Client

A carer may become a client in their own right and when this happens certain information needs to be updated on the carer's Swift record.

Addresses and Telephone Numbers Screen – Carer's Record

- If the carer becomes a client you must remove the word (**Carer**) from the Tel. No. field.
- If (**Carer**) has been recorded alongside a telephone number, amend the Tel. No. field by removing the word (**Carer**). Refer to *Frontdesk – Amending Frontdesk Information* section of this manual for guidance.
- If the person does not have a telephone number recorded, but has the word (**Carer**) in the Tel. No. field, delete this entry. Refer to *Frontdesk – Deleting Frontdesk Information* section of this manual for guidance.

Involvement Screen – Carer's Record

- You may need to update the carer's Involvements screen if the carer's key worker/key team is changing when they become a client.
- Refer to *Frontdesk – Involvements* section of this manual for guidance.

Reviews Screen – Carer's Record

- You may need to delete any reviews not yet carried out relating to the carer.
- Refer to the *Assessments and Reviews manual – Deleting a Review* for guidance.

Ending a Carer

When a carer is no longer caring for a client then certain information needs to be updated on the client's Swift record and the carer's Swift record.

Relationship Screen – Client Record

- Select the related person's record from the summary list and tick the Principal Carer No box. Refer to *Frontdesk – Relationships* section of this manual for guidance.

Addresses and Telephone Numbers Screen – Carer's Record

- If the person is no longer the carer for the client then you must remove the word (**Carer**) from the Tel. No. field.
- If (**Carer**) has been recorded alongside a telephone number, amend the Tel. No. field by removing the word (**Carer**). Refer to *Frontdesk – Amending Frontdesk Information* section of this manual for guidance.
- If the person does not have a telephone number recorded, but has the word (**Carer**) in the Tel. No. field, delete this entry. Refer to *Frontdesk – Deleting Frontdesk Information* section of this manual for guidance.

Category Screen – Carer's Record

- Record an end date against the **Carer not on mailing list** Category on the Category screen. Refer to *Frontdesk – Category* section of this manual for guidance.

Involvement Screen – Carer's Record

- End the involvement of the key worker and key team.
- Refer to *Frontdesk – Involvements – Ending Involvements* section of this manual for guidance.

Reviews Screen – Carer's Record

- Delete any reviews not yet carried out, this will automatically delete the review reminder.
- Refer to the *Assessments and Reviews manual – Deleting a Review* for guidance.