

Systems Support

Swift Training



Maintaining Providers and Provisions

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Northumbria Healthcare 
NHS Foundation Trust

In partnership with

NORTHUMBERLAND
COUNTY COUNCIL

Contents

| | |
|---|-----------|
| FINDING A PROVIDER VIA MAINTAIN ORGANISATION..... | 1 |
| FINDING A PROVIDER VIA MAINTAIN PROVIDERS | 2 |
| ACCESSING MAINTAIN CARE ITEM | 4 |
| CREATING A PROVIDER ORGANISATION | 5 |
| Recording an Organisation's Address and Telephone Number | 7 |
| Recording a Separate Billing Address | 8 |
| Recording Email Address | 9 |
| Recording Organisation Classifications | 10 |
| Recording a Start Date for a Provider | 12 |
| UPDATING PROVIDER ORGANISATION DETAILS | 14 |
| Changing an Organisation's Address and Telephone Number | 14 |
| Changing Organisation Name..... | 15 |
| Changing an Organisation's Classification..... | 16 |
| CREATING A PARENT ORGANISATION | 16 |
| ABOUT PROVISIONS..... | 16 |
| Searching for a Care Item..... | 17 |
| CREATING A CARE TYPE | 18 |
| Checking Whether the Care Type is Already Set Up | 18 |
| Checking the Swift Code List..... | 18 |
| Creating a New Care Type | 19 |
| CREATING A CARE ITEM..... | 20 |
| Attaching Account Codes to Care Items | 23 |
| Setting Up Automatic Authorisation for the Provision (Rarely Used)..... | 25 |
| ATTACHING OFFERINGS TO A PROVIDER..... | 27 |
| Attaching Offerings via Maintain Organisation | 27 |
| Attaching Offerings via Maintain Providers | 29 |
| Attaching Offerings via Maintain Care Items | 30 |

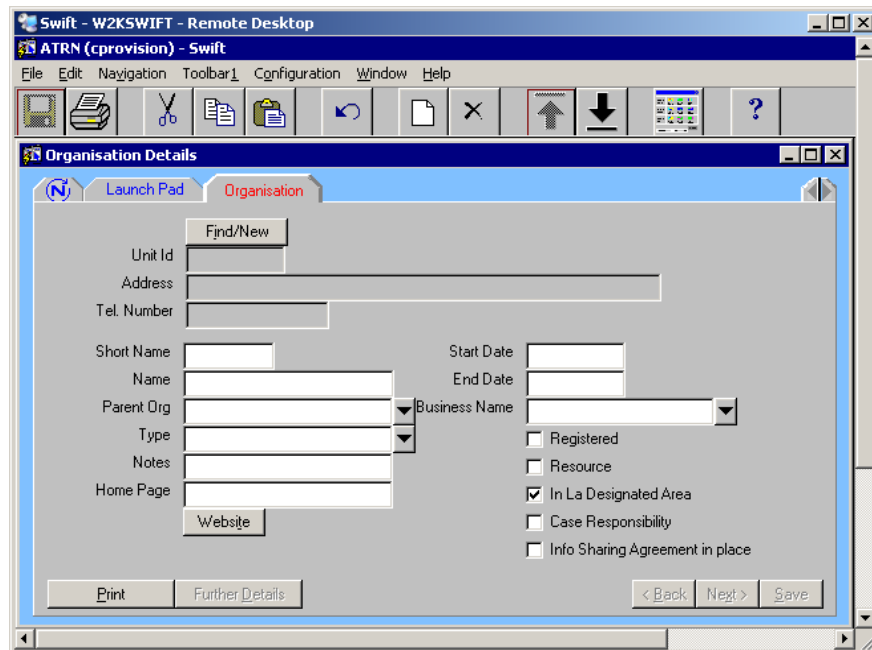
| | |
|--|-----------|
| SETTING PROVIDER RATES..... | 31 |
| About Provider Rates..... | 31 |
| Setting the Provider Rates Via Maintain Care Item Module | 32 |
| Setting the Provider Rates Via Maintain Providers | 32 |
| Setting Non Scheduled Provider Rates..... | 33 |
| Setting Scheduled Provider Rates | 35 |
| Linking Care Item to Financial Assessments Module..... | 37 |
| | |
| UPDATING PROVIDER RATES | 39 |
| Non Scheduled Rate Change for All Providers | 40 |
| Non Scheduled Rate Change for Individual Providers..... | 42 |
| Viewing Rate Updates | 45 |
| Errors on Updates..... | 45 |
| Unprocessed Updates | 46 |
| Scheduled Rate Change..... | 47 |
| Amending an Update to Provider Rates..... | 50 |
| Correcting a Rate from the Previous Uplift | 50 |
| Inserting an Uplift..... | 51 |
| | |
| ENDING PROVIDERS AND PROVISIONS..... | 51 |
| Ending the Provider | 51 |
| Ending a Provider's Offerings | 52 |
| | |
| ENDING A CARE ITEM..... | 54 |

FINDING A PROVIDER VIA MAINTAIN ORGANISATION



- From Launch Pad click on [Maintain Organisation](#).

The following screen will be displayed:




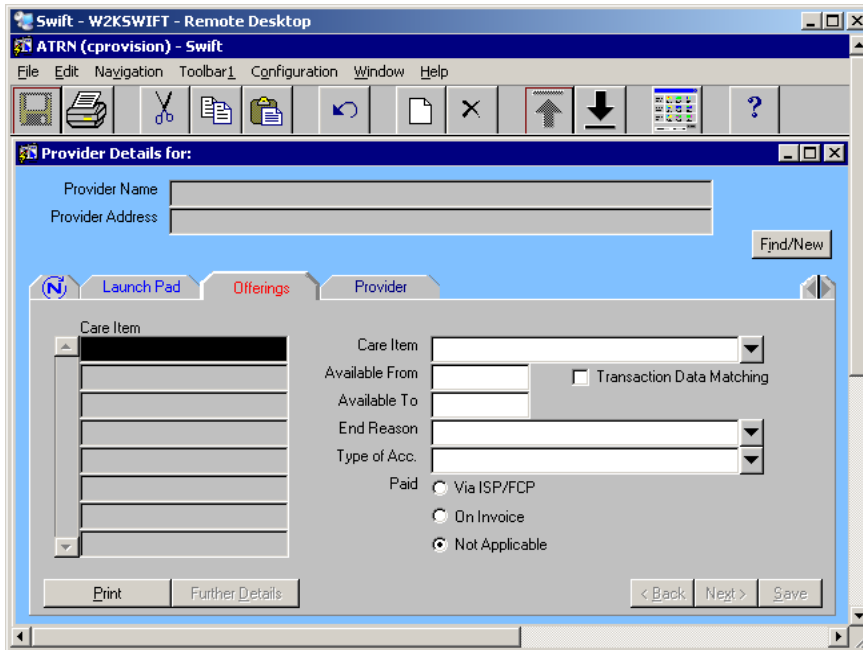
- Click on [Find/New](#) and search for the Organisation. Refer to the *Frontdesk manual - Finding an Organisation – Organisation Search Wizard* section of the manual.
- Once the Organisation is found, click on the Organisation name in the list to select it and click on [Finish >](#).


Note: if you do not find the Organisation after a thorough search, you may need to create it on Swift. Refer to Maintaining Providers and Provisions - Creating a Provider Organisation section of this manual.

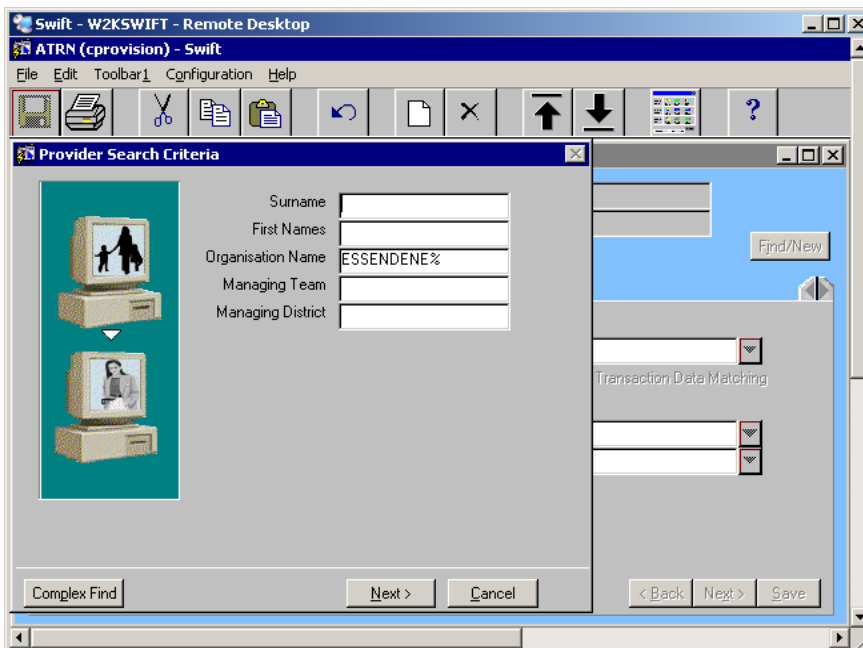
FINDING A PROVIDER VIA MAINTAIN PROVIDERS




- From Launch Pad click on .
The following screen will be displayed:



- Click on .
The following screen will be displayed:



The search screen will always remember your last search.

- To clear all fields press  and .

Swift - Maintaining Providers and Provisions - Finding a Provider via Maintain Providers

- Click into the relevant field and enter the search criteria:-

Surname

Leave blank as this field relates to a person Provider, not a Provider Organisation.

First Names

Leave blank as this field relates to a person Provider, not a Provider Organisation.

Organisation Name

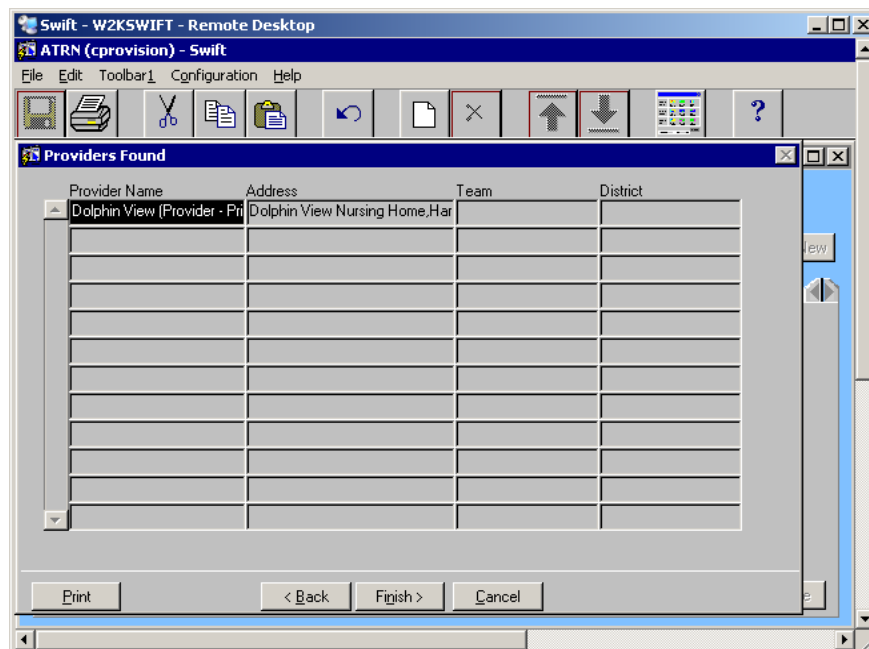
Enter the Organisation Name.



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

- Click on

The following screen will be displayed:

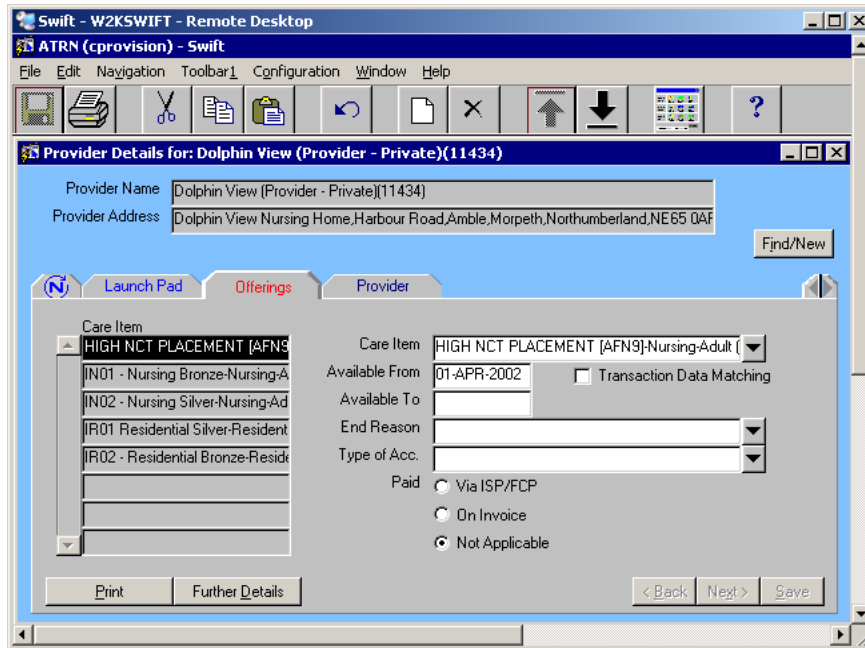


More than one Provider may be displayed depending on the results of your search.

- Click on the Provider you are searching for and click on

Note: if the Provider you are looking for is not found, you may need to refine your search criteria. Click on and re-enter the search criteria using fewer letters and more wild cards if you are unsure of the spelling. Click on . If you still cannot find the Provider you may need to create the Provider. Refer to Maintaining Providers and Provisions - Creating a Provider Organisation section of this manual.

Once you have selected the Provider the following screen will be displayed:

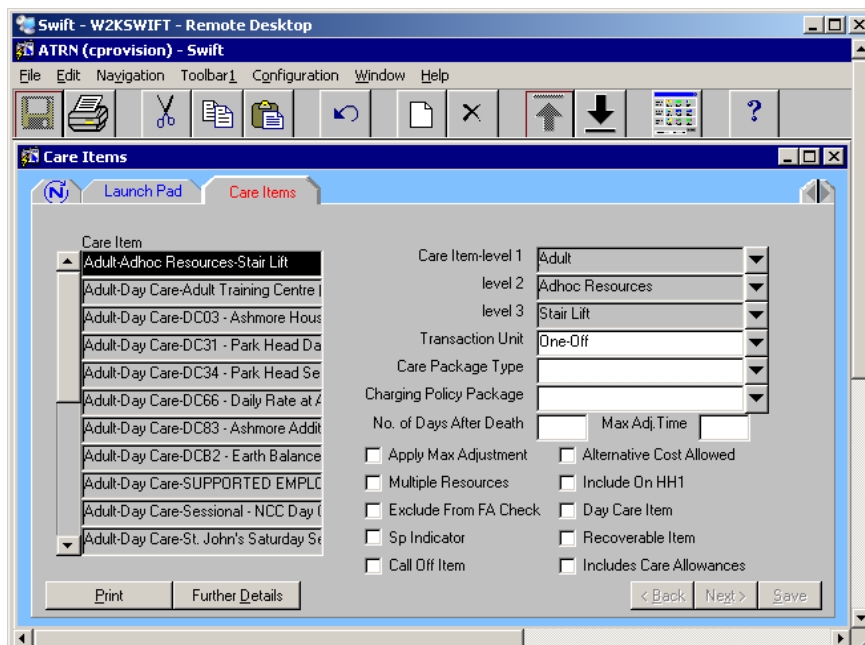


ACCESSING MAINTAIN CARE ITEM



- From Launch Pad click on .

The following screen will be displayed showing a list of the existing Care Items and their details:



- Search for the Care Item. Refer to the *Basic Use of Swift manual - Summary Lists - Searching for Information* section of the manual for guidance on searching summary lists.

CREATING A PROVIDER ORGANISATION



- Access **Maintain Organisation** and carry out an Organisation search. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.
- If you do not find the Organisation after a thorough search, click on **Create**.
The following screen will be displayed:

A screenshot of a remote desktop window titled 'Swift - W2K5WIFT - Remote Desktop'. The window shows a menu bar with 'File', 'Edit', 'Toolbar1', 'Configuration', and 'Help'. Below the menu bar is a toolbar with various icons. The main area of the window displays a form titled 'Create an Organisation'. The form has several fields: 'Short Name' (empty), 'Name' (containing 'FAIR VIEW CARE HOME'), 'Parent Organisation' (empty), 'Org. Type' (dropdown menu), 'SP Org. Type' (dropdown menu), 'Notes' (empty), 'Internet Address' (empty), 'Start Date' (empty), and 'End Date' (empty). There are three checkboxes: 'Registered' (unchecked), 'SS Resource' (unchecked), and 'SP Resource' (unchecked). At the bottom of the form are three buttons: '< Back', 'Save >', and 'Cancel'.

Some of the information you used for the search may be carried forward into this screen.

- Complete the following fields:
 - Name**
Enter the full name of the Organisation. (If you used the Organisation name for the search the name will appear here, but you may need to amend this if you used wildcards in the search.)
 - Parent Organisation**
If there is a Parent Organisation, click on the drop down box to display the list and select the relevant Parent Organisation (e.g. Northumberland County Council for all NCC residential establishments).
Note: if you are unable to find the relevant Parent Organisation you will need to set up this Organisation. Refer to Maintaining Providers and Provisions - Creating a Parent Organisation section of this manual.
 - Org. Type**
Enter the relevant Organisation Type. This can be identified from information on CSCI website.
 - Notes**
If necessary, add additional information about the Organisation.

Swift - Maintaining Providers and Provisions - Creating a Provider Organisation

Start Date

Enter the date the Organisation was first in use or the start date of the current financial year if not known.

SS Resource

Click in the box to add a tick unless this is a Parent Organisation.

Note: all Provider Organisations must have SS Resource ticked. Only leave this field blank if you are creating a Parent Organisation.

The screen should look something like this one:

The screenshot shows a 'Create an Organisation' window. The fields are filled with the following information:

- Short Name: 254896
- Name: FAIR VIEW CARE HOME
- Parent Organisation: (empty)
- Org. Type: Provider - Private
- SP Org. Type: (empty)
- Notes: (empty)
- Internet Address: (empty)
- Start Date: 01-APR-2006
- End Date: (empty)
- Registered:
- SS Resource:
- SP Resource:

Buttons at the bottom: < Back, Save >, Cancel.

- Click on .

The following screen will be displayed:


The screenshot shows an 'Organisation Details' window. The fields are filled with the following information:

- Unit Id: 12992
- Address: (empty)
- Tel. Number: (empty)
- Short Name: 254896
- Name: FAIR VIEW CARE HOME
- Parent Org: (empty)
- Type: Provider - Private
- Notes: (empty)
- Home Page: (empty)
- Website: (empty)
- Start Date: 01-APR-2006
- End Date: (empty)
- Business Name: (empty)
- Registered:
- Resource:
- In La Designated Area:
- Case Responsibility:
- Info Sharing Agreement in place:

Buttons at the bottom: Print, Further Details, < Back, Next >, Save.

- Check that there is a tick in the Resource field as this allows the Organisation to be used as a Provider.




Swift - Maintaining Providers and Provisions - Creating a Provider Organisation

- A tick will default into the In LA Designated Area field. If the Provider is outside of the county you must remove the tick and then click on .
- Swift will automatically generate a Unit ID (displayed in the top field on the Organisation screen. This must be entered in the Provider Details book against the relevant Provider Code).
- You now need to record additional information about the Provider such as address, telephone number, classification etc.

Recording an Organisation's Address and Telephone Number

An address and telephone number must be recorded for all Providers unless you are creating a "dummy Provider" which is not a real Organisation, e.g. Care Management Budget Payments.




- Access  and find the Organisation. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.
- Click on .
- Click on .

Complete the following fields:

Address Type

Enter **Organisation's Postal Address**.

Search Address

Click on  and carry out a search for the address. Refer to the *Frontdesk manual - Finding an Address* for instruction.

Note: if the address does not exist on Swift and has to be created, you must use the Royal Mail website to obtain the correct address details to be used.

Start Date

Enter the date the Organisation started using the address or the date we began using that Provider if this information is not known.

Display Address

Click in the box to add the tick.

Tel. No.

Enter the telephone number.

Tel. Type

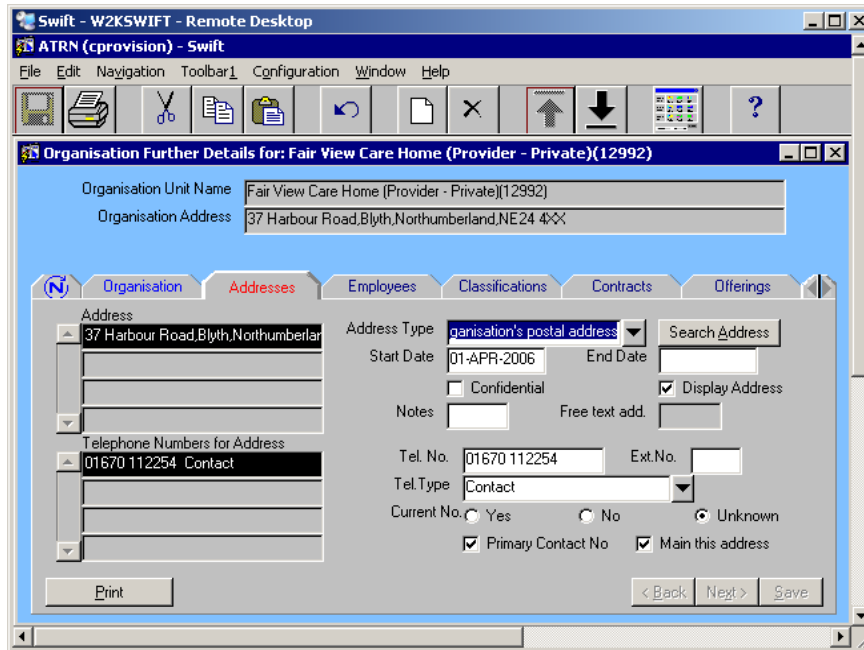
Enter **Contact**.

Primary Contact No.

If this is the primary contact number, click in this box to indicate enter a tick and indicate this.

- Click on .

The following screen will be displayed:



- If the Provider's billing address is different to their postal address you will need to record an additional address. Refer to *Maintaining Providers and Provisions - Creating a Provider - Recording an Organisation's Address and Telephone Number - Recording a Separate Billing Address* section of this manual.

Recording a Separate Billing Address



- Access **Maintain Organisation** and find the Organisation. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.

- Click on **Further Details**.
- Click on **Addresses**.

- Press **F6** to create a new row.
- Complete the following fields:

Address Type

Enter "Billing Address".

Search Address

Click on **Search Address** and carry out a search for the address. Refer to the *Frontdesk manual - Finding an Address* for instruction.

Start Date

Enter the date the Organisation started using the address or the date we began using that Provider if this information is not known.

Display Address

Do **not** tick this box as the display address should be the one already recorded as the Organisation's postal address.

Tel. No.


Enter the telephone number.

Tel. Type

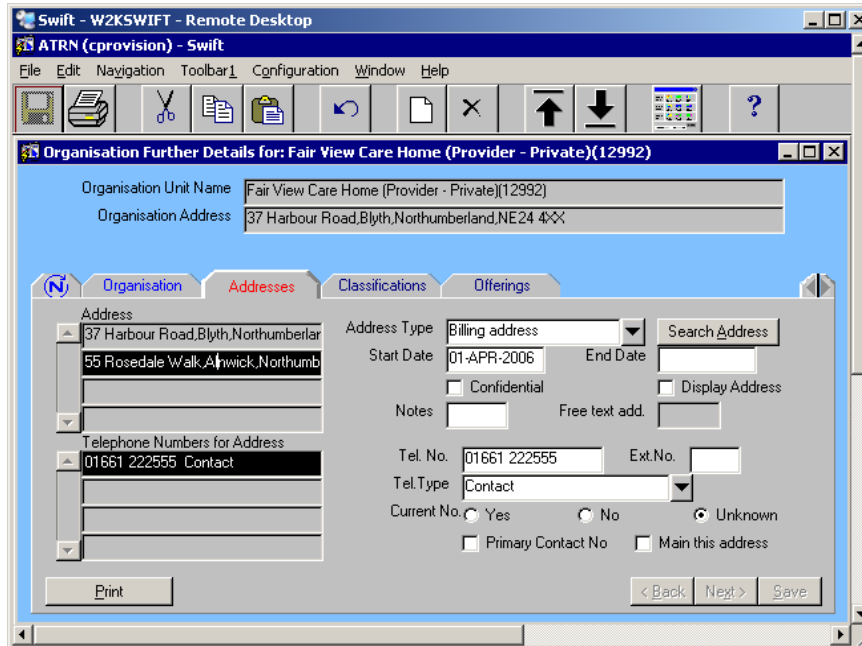
Enter **Contact**.

Primary Contact No.

Do **not** tick this box as the primary contact number should be the one already recorded against the Organisation's postal address.




- Click on .

The Address screen for billing addresses should look something like this one:



Recording Email Address



- Access  and find the Organisation. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.
- Click on .
- Click on .

Swift - W2K5WIFT - Remote Desktop

ATRN (cprovision) - Swift

File Edit Navigation Toolbar1 Configuration Window Help

Organisation Further Details for: Fair View Care Home (Provider - Private)(12992)



Organisation Unit Name: Fair View Care Home (Provider - Private)(12992)

Organisation Address: 37 Harbour Road,Blyth,Northumberland,NE24 4XX

Classification Type | Main | Start Date | End Date | Notes

| Classification Type | Main | Start Date | End Date | Notes |
|---------------------|--------------------------|------------|----------|-------|
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |

Print < Back Next > Save

- Press  to create a new row.
- Complete the following fields:
 - Classification Type**
Enter "Email address".
 - Start Date**
Enter the date the Organisation started using the email address or the date we began using that Provider if this information is not known.
 - Notes**
Enter the email address into this field.
- Click on .

Recording Organisation Classifications

All residential/nursing and short break care Providers must have classifications recorded to indicate:

- ◇ **CSCI code.**
- ◇ The **name of the Contracts Officer** responsible for the Provider.
- ◇ The **Contract Type** e.g. Statement of Terms.
- ◇ **CNEN** if the care home is part of the CNEN contract.
- ◇ **Discharge Day** (to indicate the number of days after discharge that the care home is to be paid)

Note: the name of the Finance person responsible for the care home will be recorded as a classification by a member of Finance section.

Some of this information is needed for the Contracts Ready Reckoner to operate correctly.

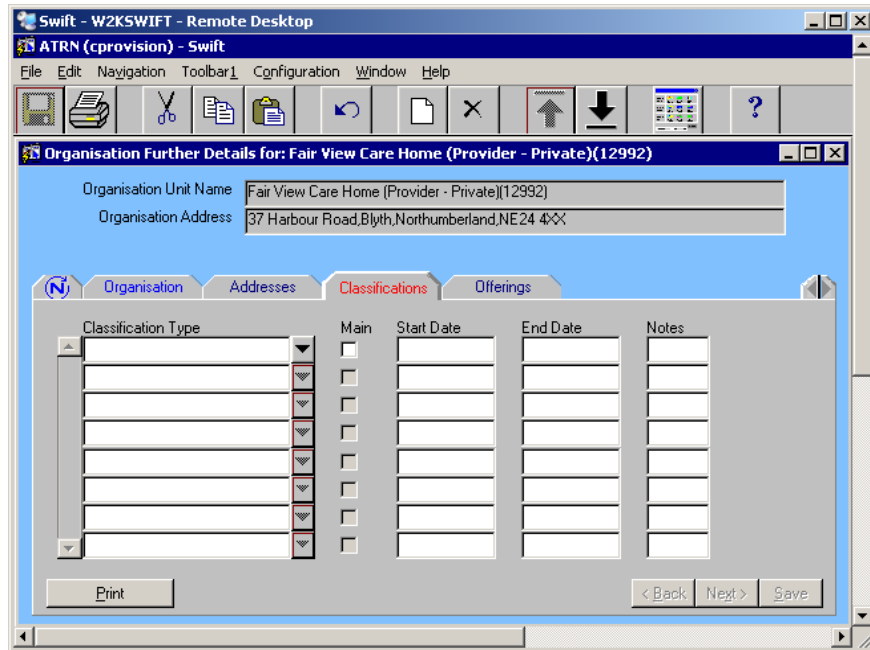


- Access **Maintain Organisation** and find the Organisation. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.

- Click on **Further Details**.

- Click on **Classifications**.

The following screen will be displayed:



- Press **F6** to create a new row.

- Complete the following fields:

Classification Type

Enter the appropriate classification type.

Start Date

Enter the start date.

End Date

If the classification has ended, enter the end date.

Notes

This field should only be completed for CSCI code or Discharge day:

- ◇ When entering a CSCI code, enter the specific CSCI code for the Provider (this can be obtained from the CSCI website and is the last 5 digits of the ID in the web address when the Provider is found on CSCI).
- ◇ When entering Discharge day, enter the number of days.

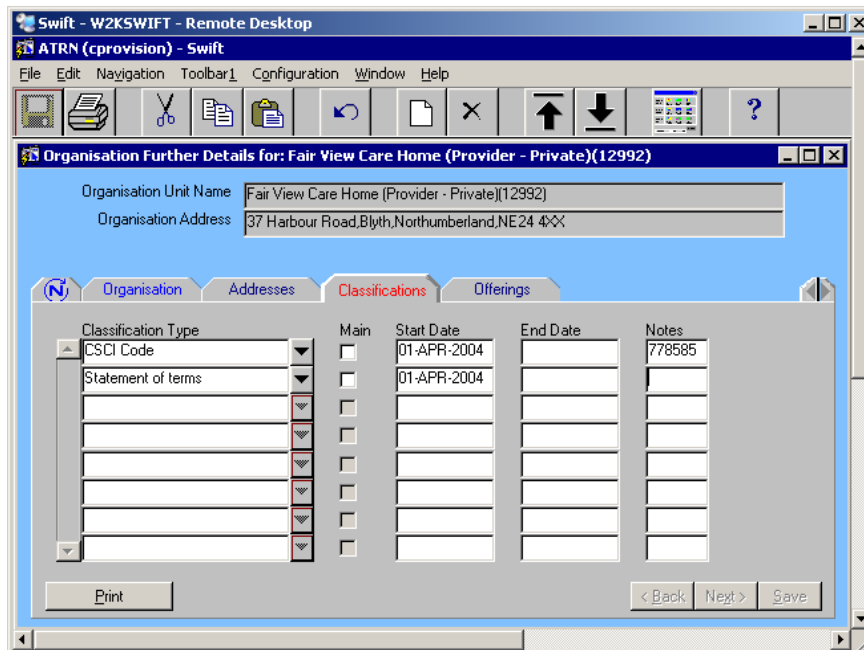
- Click on **Save**.

- If there are more classifications to record, create a new row and repeat this process.

Swift - Maintaining Providers and Provisions - Creating a Provider Organisation

Note: there should always be three classifications if it is a non CNEN Provider or four if it is a CNEN Provider.

The following screen will be displayed:



Organisation Unit Name: Fair View Care Home (Provider - Private)(12992)
Organisation Address: 37 Harbour Road, Blyth, Northumberland, NE24 4XX

| Classification Type | Main | Start Date | End Date | Notes |
|---------------------|--------------------------|-------------|----------|--------|
| CSCI Code | <input type="checkbox"/> | 01-APR-2004 | | 778585 |
| Statement of terms | <input type="checkbox"/> | 01-APR-2004 | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |
| | <input type="checkbox"/> | | | |

In this example, more classifications need to be recorded, e.g. Contracts Officer.

Recording a Start Date for a Provider

Once the Provider has been created on Swift, the date the Organisation became a Provider must be recorded.



- Access **Maintain Providers** and find the Provider. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Providers* section of this manual.
- Click on **Provider**.

The following screen will be displayed:

The screenshot shows a remote desktop window titled 'Swift - W2KSWIFT - Remote Desktop'. The application window is 'ATRN (cprovision) - Swift' with a menu bar (File, Edit, Navigation, Toolbar_1, Configuration, Window, Help) and a toolbar. The main window is 'Provider Details for: Fair View Care Home (Provider - Private)(12992)'. It contains the following fields and controls:

- Provider Name: Fair View Care Home (Provider - Private)(12992)
- Provider Address: 37 Harbour Road,Blyth,Northumberland,NE24 4XX
- Find/New button
- Navigation tabs: Launch Pad, Offerings, Provider (selected)
- District: [Dropdown]
- Team: [Dropdown]
- Available From: [Text]
- Available To: [Text]
- Payment Type: ISP Provider, Net, Gross
- Suspended: Suspended
- Notes: [Text]
- Creditor Ref: [Text]
- Creditor Name: [Text]
- Provider Ref: [Text]
- Vat Exempt: Vat Exempt
- Buttons: Print, Further Details, < Back, Next >, Save

- Complete the following fields:

Available From

Enter the date the Organisation became a Provider. If the date is not known, use the start of the current financial year.

Note: the Creditor Reference and Creditor Name will be recorded by Finance staff when this information becomes available.

- Click on 

The screen should look something like this one:

This screenshot is identical to the previous one, but the 'Available From' field is now populated with the date '01-APR-2004'. The 'Save' button is highlighted, indicating it has been clicked.

UPDATING PROVIDER ORGANISATION DETAILS

Changing an Organisation's Address and Telephone Number

When the Organisation's postal address or billing address changes this must be entered on the Addresses screen, but the old addresses must be retained for the historic record.



- Access **Maintain Organisation** and find the Organisation. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.

- Click on **Further Details**.

- Click on **Addresses**.

- Click on the address from which the Organisation has moved in the summary list.

- **End Date**

Enter the date the Organisation moved out of this address.

- Press **FG** to create a new row.

- Complete the following fields:

Address Type

Enter the appropriate address type e.g. **Organisation's Postal Address** or **Billing Address**.

Search Address

Click on **Search Address** and carry out a search for the address. Refer to the *Frontdesk manual - Finding an Address* for instruction.

Start Date

Enter the date the Organisation moved to the address or today's date if this information is not known.

Display Address

If this is the Organisation's postal address, click this box.

Tel. No.

Enter the telephone number.

Tel. Type

Enter **Contact**.

Primary Contact No.

If this is the Organisation's postal address click this box to add a tick.

- Click on **Save**.

Changing Organisation Name

When the name of a Provider changes, the new name should be recorded on Swift and the old name must be retained.



- Access **Maintain Organisation** and find the Organisation. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.

The screen should look something like this one:

- Enter the new name of the Provider in the Name field.
- Click on **Save**.
- Click on **Further Details**.
- Click on **Classifications**.
- Complete the following fields:

Classification Type

Enter "Previous Name".

Start Date

Enter the date they changed their name.

End Date

Enter the date they changed their name.

Notes

Enter the previous name in this field.

- Click on **Save**.

Changing an Organisation's Classification

- If the Provider Classification has changed, for example, if the Contracts Officer responsible for the Provider changes, you will need to end one classification and record a new one.
- If the classification details have been entered incorrectly you can amend these, or you can delete it altogether if it was entered in error.



- Access **Maintain Organisation** and find the Organisation. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.
- Click on **Further Details**.
- Click on **Classifications**.
- Click on the Classification which is to be ended.
- Enter an End Date.
- Click on **Save**.
- Press **F6** to create a new row and record the new Classification. Refer to *Maintaining Providers and Provisions - Creating a Provider Organisation - Recording Organisation Classifications* section of this manual.

CREATING A PARENT ORGANISATION

In some circumstances an Organisation may need to be created which is not the actual Provider of a service, but is the Parent Organisation of the Provider. For example, there may be one Organisation which operates a number of care homes. In this situation each of the care homes would be set up as a Provider and the Organisation to which they belong would need to be set up as a Parent Organisation.

The instruction for creating a Parent Organisation is the same as the instruction for creating a Provider Organisation, with one exception; Parent Organisations should not be marked as a Resource. Refer to *Maintaining Providers and Provisions - Creating a Provider Organisation* section of this manual.

ABOUT PROVISIONS

Once a Provider is created on Swift it needs to be linked to the service/s that the Provider offers. These services are known as Provisions, Care Items or Offerings, depending upon where you are in Swift.

Most provisions are set up with a standard built-in cost so that when the provision is entered on a client record, the cost will be entered automatically. However, in a small number of cases provisions may need to be set up with an "alternative cost", and this means that the cost has to be recorded manually by the person who enters the provision on the client record.

Every provision except residential and nursing must have a unit of measure identified in brackets as part of the Provision name. The most common ones used are Daily; Sessional; 15 Min; One Off; Weekly and Unit.

If the cost of a provision has to be entered manually by local admin, then "Alt. Cost" should also be included in the Provision name.

Searching for a Care Item

When you attach Offerings to a Provider or Link a Care Item to a Financial Assessment you will need to find a Care Item as follows:

There is a quick way of searching for the Care Item:

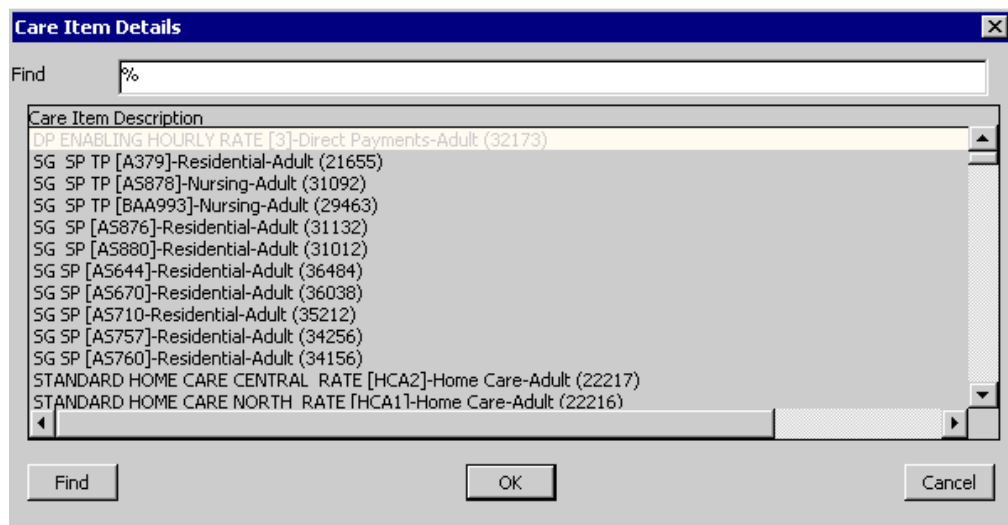
- Tab to the Care Item or Service field.
- Enter the first few letters of the name of the Care Item, e.g. Home Care.
- Press the tab key.

Either the name of the Care Item will automatically appear in the field or a selection will appear.




If you fail to find the Care Item you want using this method then you can use the search facility on the display list:

- Click on the drop down box to display the list of Care Items.

The following screen will be displayed:



The list of Care Items is very long as it contains the names of all Care Items and, although it is possible to scroll down the list, the Find option, appearing at the top of the screen, will enable you to quickly find the Care Item that you want.

- Enter as much text as necessary to find the Care Item. The wild card can be used for any part of the Care Item name you are unsure of, e.g. %HOME CARE%.
- Click on .
- When the Care Item is found, click on the Care Item to select it and click on . If there is more than one Care Item displayed, click on the one that you want, then click on .

The Care Item will appear in the Service field.

Note: if you can't find the Care Item you are looking for please contact the Systems Support Help Line on 01670 622 450.

CREATING A CARE TYPE

If there is already a Care Item set up which seems to be appropriate you will need to determine whether to create a new one or whether to attach the Care Item to the Provider as an Offering. The decision taken will depend on the service that is being provided:

| | |
|---|---|
| Residential and Nursing Care and Short Break Care. | <ul style="list-style-type: none">• If the Provider's costs differ from other Providers attached to the Care Item, you will need to create a new separate Care Item due to the links with the Resipay system. This is true even if a Care Item exists which appears to be appropriate.• If the Provider's costs are the same as other Providers for an existing Care Item, attach the existing Care Item as an Offering for the new Provider. |
| Scheduled Services such as Home Care or Day Care and Non Scheduled Services other than Residential/ Nursing Care such as one off payments. | <ul style="list-style-type: none">• If an appropriate Care Item already exists, and the charging policy package is the same, you do not need to create a new one from scratch. Instead, you can attach the existing Care Item to the new Provider. This is true even if the cost for the service varies from one Provider to another because the cost is entered against individual Providers.• A new Care Item will therefore only need to be created if there is no suitable provision already set up on Swift. |

Checking Whether the Care Type is Already Set Up

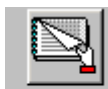
The Care Type is the name of the Provision. Before creating a new Care Type for the new Provision it is important that you check that it is not already set up on Swift so that you do not duplicate an existing Care Type. You can do this in two ways:

- ◇ Access the relevant *List of Current Providers* spreadsheet for Res/Nursing or Schedule, which shows all the provisions that are set up in Swift.

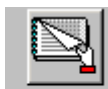

Note: these reports are set up for Contracts staff by the Information Lead (Social Care).


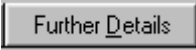

- ◇ Access the Swift code list CCI3RD and carry out a search for the Care Type.

Checking the Swift Code List




Maintain Codes

- From Launch Pad click on .
- Press  to clear all of the information and begin the search.

- Enter **CCI3RD** in the Code Table field.
- Press  to carry out the search. Code List CCI3RD should be the only code table displayed on the screen.
- Click on  to see the list of Care Types on the code list. The list will be quite long therefore carrying out a search for the Care Type would be advisable rather than scrolling down the list.
- Press  to clear all of the information and begin the search.
- Click into the Meaning field and enter the Care Type you wish to search for.

Note: remember to use wildcards if you are not sure of the name of the Care Type.

The search is case sensitive so if the search is unsuccessful you may need to try again with initial capitals. For example, if you entered "%Home Care%" the care type would not be found if it was recorded as "STANDARD HOME CARE NORTH RATE".





- Press  to carry out the search.
- If the Care Type already exists on the code list it will be displayed on the screen. If the Care Type is displayed you do not need to create a new Care Type but should now proceed with creating a Care Item. Refer to *Maintaining Providers and Provisions - Creating a Care Item* section of this manual.
- If the Care Type is not found the first time, carry out the search again using a different format as it is important that the same Care Type is not duplicated under a different name. Once you are sure it does not exist, you can begin creating a new Care Type. Refer to *Maintaining Providers and Provisions - Creating a Care Type* section of this manual.

Creating a New Care Type


Once you have established that the Care Type does not already exist on code list CCI3RD, you need to create it, as this is how you set up the name of the Provision.



Maintain
Codes

- From Launch Pad click on .
- Press  to clear all of the information and begin the search.
- Enter **CCI3RD** in the Code Table field.
- Press  to carry out the search. Code List CCI3RD should be the only code table displayed on the screen.
- Click on  to see the list of Care Types on the code list.

Note: you must have already checked that the Care Type does not already exist before continuing.

- Press .
- Complete the following fields:

Code


Enter the next available code from the Provision Code List book.

Meaning.

Enter the name of the Provision. The meaning should be non specific so it can be used by several Providers, for example it should **not** include client group or the name of the Provider and must include the following elements:

- ◇ Description of the type of service being offered e.g. Day Care; Enabling; Home Care etc.
- ◇ For provisions other than residential and nursing, the unit of measure e.g. 15 Mins or Sessional, must always be included, so that the admin person entering the service on a client record is clear about how it must be entered.
- ◇ For Residential/Nursing or Short Break Care provisions, the Meaning must be set up using the appropriate abbreviation followed by the Provision Code in square brackets. Abbreviations are listed below, and the Provision Codes can be obtained from the Provisions List Book. Here are some examples:

SG = Single
SP = Spot
TP = Third Party
SC = Scottish
DOM = Domiciliary
DP = Direct Payment
DEE = Dementia

- ◇ For all Continuing Care provisions, the Meaning should start with “NHS FUNDED”.
- Click on 

Once the Care Type is set up you can continue with creating the Care Item. Refer to *Maintaining Providers and Provisions - Creating a Care Item* section of this manual.

CREATING A CARE ITEM

Once the Care Type is set up on code list CCI3RD the Care Item can be created.

Each Care Item is made up of three levels. Each level identifies a specific aspect of the service e.g. Level 1 always identifies that it is a service for an adult, Level 2 identifies the type of service and Level 3 is the detailed information about the service which may be a Care Type that you have previously set up.

Here are a few examples of the three levels and how they can be combined to make a Care Item:

| Level 1 | Level 2 | Level 3 |
|---------|-------------|------------------------|
| Adult | Residential | SILVER OP 98/04 [IR01] |

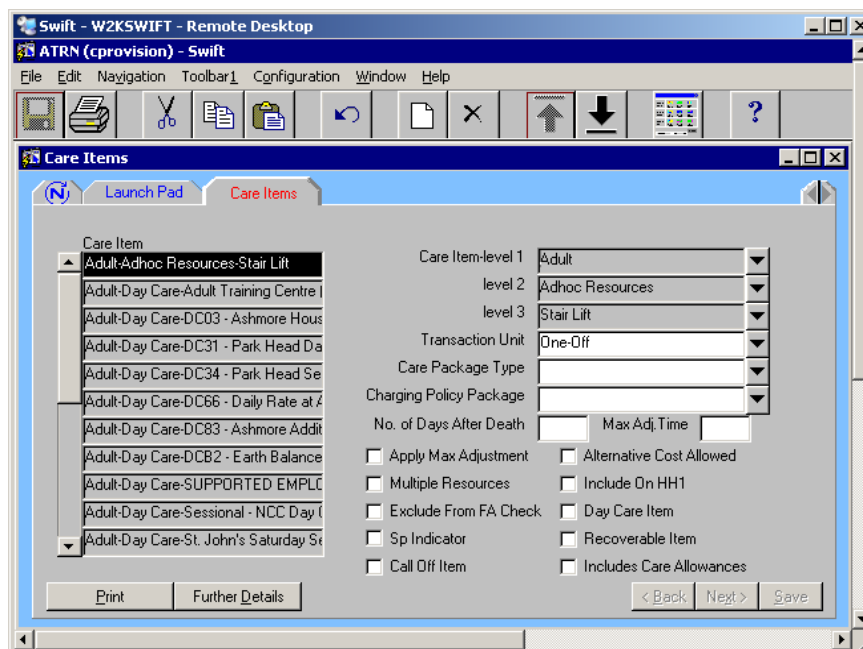
Swift - Maintaining Providers and Provisions - Creating a Care Item


| | | |
|-------|------------------------|---|
| Adult | Day Care | SESSIONAL DAY CENTRE - NCC [DC01] |
| Adult | Home Care | STANDARD HOME CARE NORTH RATE [HCA1] |
| Adult | Miscellaneous | CARE MAN BUDGET PAY (WEEKLY ALT. COST) [AD04] |
| Adult | Adult Equipment - Aids | TELECARE EQUIPMENT |



- From Launch Pad click on

The following screen will be displayed showing a list of the existing Care Items and their details:



- Search for the Care Item to ensure that it does not already exist on Swift. Refer to the *Basic Use of Swift manual - Summary Lists - Searching for Information* for guidance on searching summary lists.
- Once you are sure that the Care Item is not already created continue as follows.
- If the Care Item does not already exist begin creating it by pressing 
- Complete the following fields:

Care Item Level 1

Enter **Adult**.

Care Item Level 2

Enter the type of service e.g. Residential, Home Care, Direct Payments. If there is not an appropriate Level 2, contact the Systems Support Help Line.

Note: care home provisions for Continuing Care, must always have Care Item Level 2 set as **Residential**, not Nursing.

Care Item Level 3

Enter the relevant third level for the Care Item.

Note: Care Item Level 3 is generated from code list CCI3RD. If the Care Item Level 3 that you need is not displayed it may need to be created on that code list. Refer to Maintaining Providers and Provisions - Creating a Care Type section of this manual.

Transaction Unit

Enter the transaction unit which relates to the unit of cost. (See examples of transaction units below.)

*Note: the list below is **not** an exhaustive list, it merely provides **examples**. In many cases a type of service may seem to fit under more than one of the transaction units, and you need to select the one relevant to the unit of cost.*

| Transaction Unit | Examples of Relevant Services |
|-------------------------|--|
| Annually | Services with an annual cost , e.g. Talking Books, Direct Payment Respite, NHS Funded Residential costs etc. |
| Daily | Services with a daily cost e.g. Day Care, Home Care overnight service, Meals on Wheels, Direct Payments etc. |
| Fifteen Minutes | Services with a cost per 15 minutes e.g. Home Care. |
| Hour | Services with an hourly cost e.g. Bathing services, Day Care, Outreach, Direct Payment Providers. |
| Monthly | Services with a cost per month e.g. NHS Funded Day Care |
| One Off | Services which are one off cost regardless of the duration, e.g. Transport & Fares, Care Management Budget Payments, Direct Payments, |
| Session | Services with a cost per session e.g. any Day Care with a cost per half day. |
| Weekly | Services with a cost per week , e.g. Residential Care, Nursing Care, special day care such as Headway Theatre Drama Therapy, Home Care such as NHS Funded Weekly. |

Charging Policy Package

If there is a charging policy for this Care Item, select the relevant charging policy.

Note: information on charging policies may be provided by the Contracts Officer or the Head of Policy and Systems.

Here are some examples of charging policies and appropriate Care Items (note this is not a complete list):

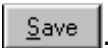
| Charging Policy | Care Item Level 3 |
|----------------------------|--|
| Home Care - Standard | STANDARD HOME CARE CENTRAL RATE [HCA2] |
| Home care - provision cost | DIRECT PAYMENTS WEEKLY |
| Enabling (no transport) | ENABLING CARE SPOT |
| Day care - meals | BLOCK CONTRACT DAILY RATE |
| No charge | START HOME HELP |

Alternative Cost Allowed

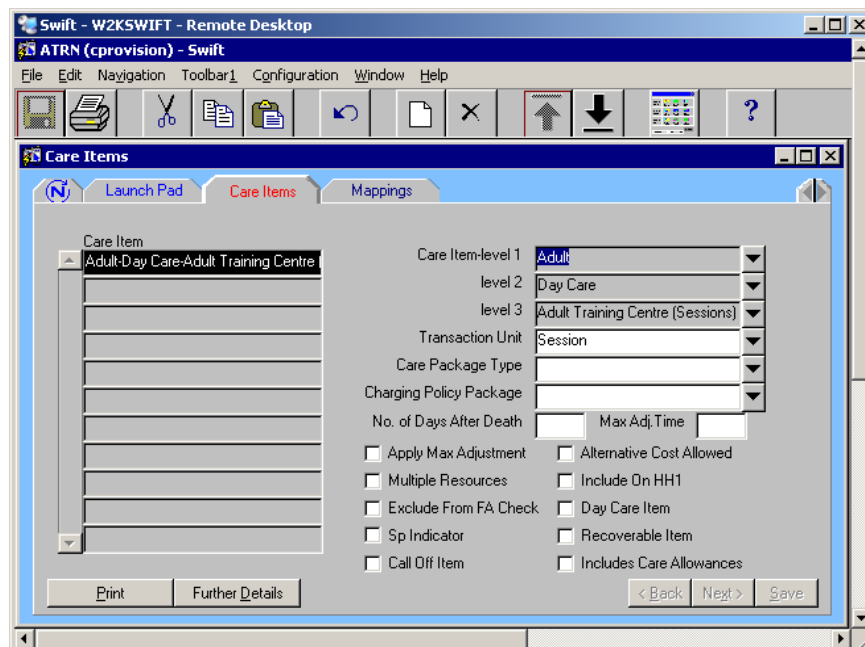
Tick this box if the cost for the Care Item is to be entered manually on each client's record.

Multiple Resources

This field should only be used for scheduled services such as home care and day care where you are able to detail which days of the week the service is being provided. Ticking this field allows admin to enter multiple workers providing the services to a person, for example where two home carers may need to visit at the same time.

- Click on .

The screen should look something like this one:



Attaching Account Codes to Care Items

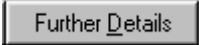

When a Care Item is set up it will need to be attached to account codes for budget purposes. These account codes are;

Swift - Maintaining Providers and Provisions - Creating a Care Item

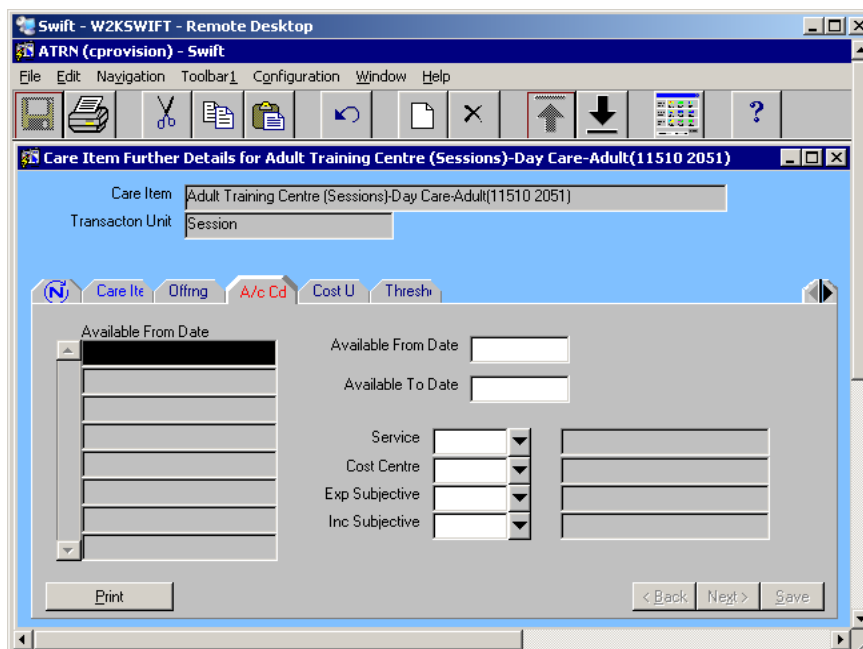
- ◇ Division of Service. Separate sections of the budget at the top level, which must be attached to each Care Item.
- ◇ Cost Centre. Cost Centre should not usually be attached. If this is left blank the cost centre of the Key Team will default into the Non Schedule and Schedule screens.
- ◇ Exp Subjective. A lower level split in the budget depending on which provision is used.

Note: information on account codes may be provided by the Contracts Officer or the Head of Policy and Systems.

Once the Account Codes are set up for the Care Item, the Division of Service, Cost Centre and Subjective will default in when admin enter a provision against a client.

- Once you have the relevant Care Item selected, click on .
- Click on  (Account Codes).

The following screen will be displayed:



The screenshot shows a software window titled 'Swift - W2KSWIFT - Remote Desktop' with a sub-window 'ATRN (cprovision) - Swift'. The main window is 'Care Item Further Details for Adult Training Centre (Sessions)-Day Care-Adult(11510 2051)'. It features a menu bar (File, Edit, Navigation, Toolbar, Configuration, Window, Help) and a toolbar. The 'A/c Cd' tab is active. The 'Care Item' field contains 'Adult Training Centre (Sessions)-Day Care-Adult(11510 2051)' and the 'Transaction Unit' is 'Session'. Below are fields for 'Available From Date', 'Available To Date', 'Service', 'Cost Centre', 'Exp Subjective', and 'Inc Subjective'. A 'Print' button is at the bottom left, and '< Back', 'Next >', and 'Save' buttons are at the bottom right.

- Complete the following fields:

Available From Date

Enter the earliest date from which the Care Item will be used.

Service


Enter the appropriate Division of Service for the Care Item e.g. Care Management (CAREMGT); County Council home care (CARENHH); NCC block-funded service (NCCBLOCK); Independent sector block contract (INDBLOCK); NHS (NHS Continuing Care); Service with no cost to purchase budget (ZEROCOST).

Cost Centre

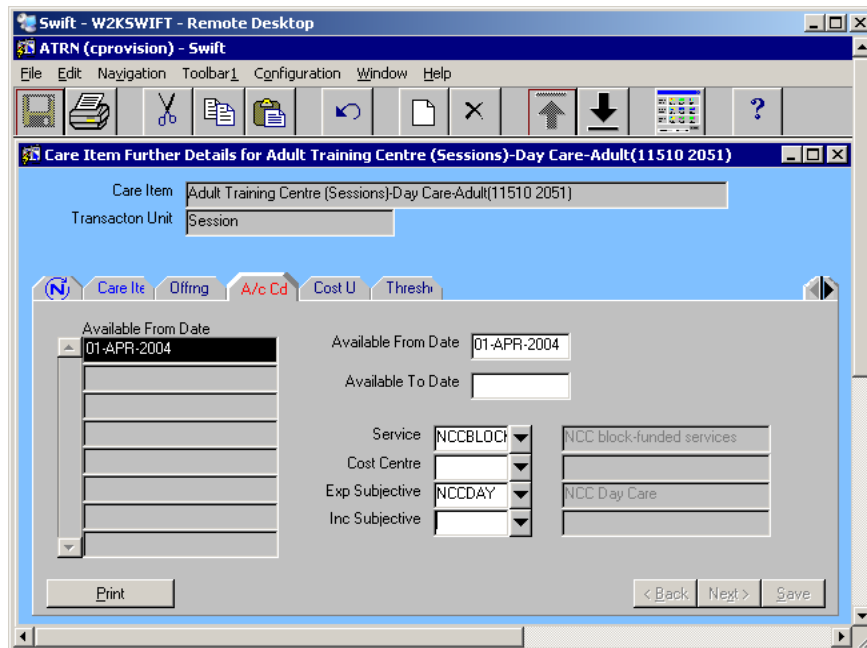
Leave this blank (if no cost centre is entered here, the cost centre of the Key Team should default in when this Care Item is used).

Exp Subjective

Enter the appropriate Expenditure Subjective code for the Care Item.



- Click on .

The screen should look something like this one:



Setting Up Automatic Authorisation for the Provision (Rarely Used)

Note: *it is very rare* for a provision to be set up in such a way that it will automatically authorise. There are only a very few provisions set up this way at the time of writing this manual, e.g. the MILBURY ACTUAL STAY FINANCE USE ONLY CARE ITEM. **Do not use this facility unless you have confirmed that the Care Item should be set to authorise automatically.**

- Once you have the Care Item selected, click on .
- Click on  (Threshold).

The following screen will be displayed:

The screenshot shows a software window titled "Swift - W2K5WIFT - Remote Desktop" with a sub-window "ATRN (cprovision) - Swift". The main content area is titled "Care Item Further Details for MILBURY ACTUAL STAY FINANCE USE ONLY-Residential-Adult(11448 1990 569)". The "Care Item" field contains the same text, and the "Transaction Unit" is set to "Weekly". Below this, there are tabs for "Care It", "Offrng", "A/c Cd", "Cost U", and "Thresh". The "Thresh" tab is active, displaying a table for "Start Date/Client Cat" and several input fields: "Client Category", "Start Date", "End Date", "Weekly Threshold", and "One Off Threshold". Each of these fields has a corresponding "Change" field. At the bottom, there are buttons for "Print", "< Back", "Next >", and "Save".

- Complete the following fields:

Start Date

Enter the earliest date from which the Care Item will be used.

Weekly Threshold

If the service is Weekly, enter an amount which is higher than it would usually cost. If the Care Item should automatically authorised at all times, set it to 9999999999.

Weekly Threshold Change

If the service is Weekly, enter an amount which is higher than it would usually cost. If the Care Item should automatically authorised at all times, set it to 9999999999.

One Off Threshold

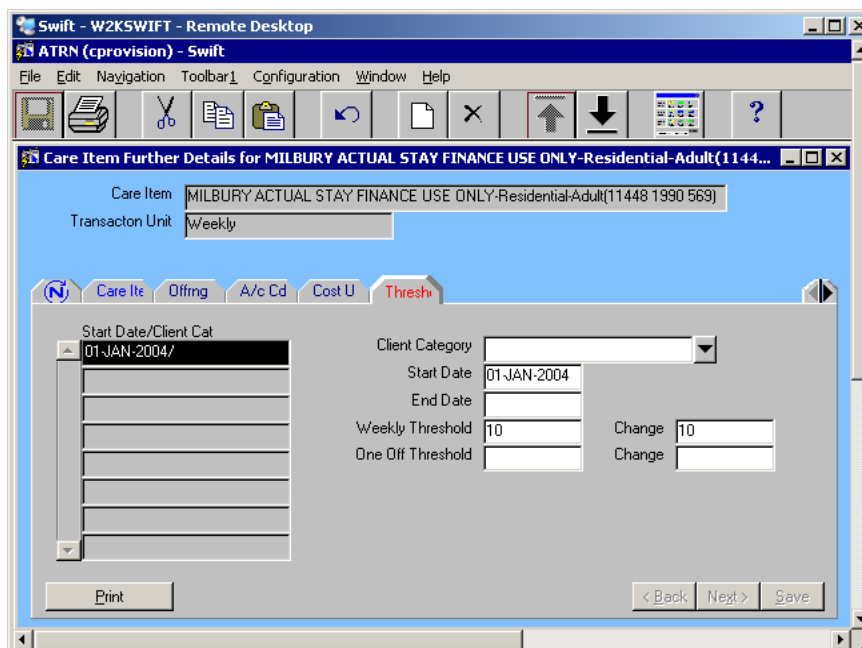
If the service is One Off, enter an amount which is higher than it would usually cost. If the Care Item should automatically authorised at all times, set it to 9999999999.

One Off Threshold Change

If the service is One Off, enter an amount which is higher than it would usually cost. If the Care Item should automatically authorised at all times, set it to 9999999999.

- Click on 

The screen may look something like this:



In this example the threshold of £10 will ensure that it automatically authorises because the unit cost is £0.01.

ATTACHING OFFERINGS TO A PROVIDER

Once the Provider and the Care Item exist, the Care Item can be attached to the Provider which will result in the setting up of Offerings.

Offerings can be attached to a Provider from various modules in Swift and this manual provides instruction on how to attach an Offering from each of these modules. Which module is used, however, is very much dependent on where you are in Swift when you are ready to attach the Offering:

- ◇ Maintain Organisation – useful where you have to create the Provider, but where the Care Item already exists.
- ◇ Maintain Providers – useful when the Provider and Care Item already exist, especially if there are a number of offerings to attach to the Provider.
- ◇ Maintain Care Item – best option if you have just created the Care Item and want to attach a number of Providers to the same Care Item.

Attaching Offerings via Maintain Organisation

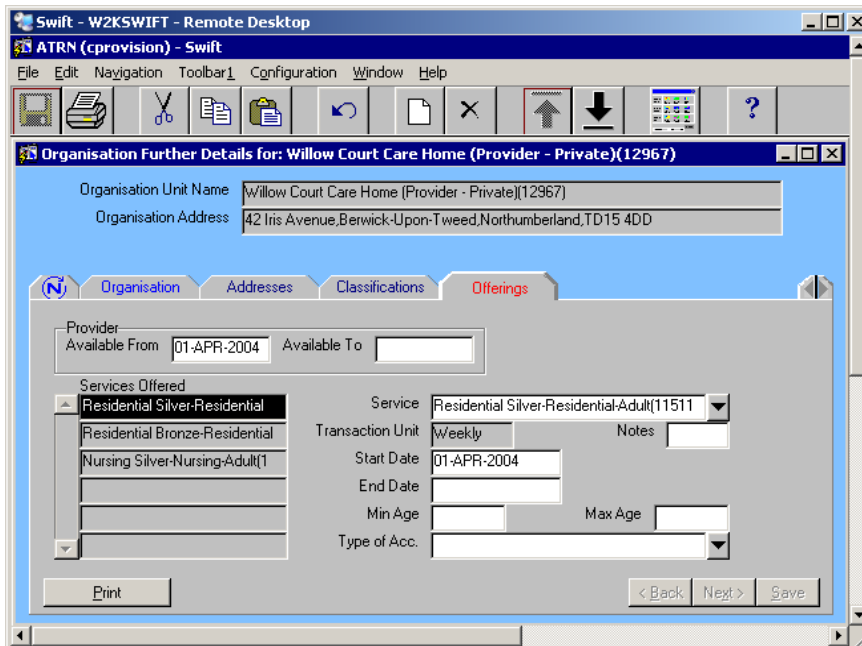


- Access **Maintain Organisation** and carry out an Organisation search. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Organisation* section of this manual.
- Once the Organisation is found, click on the name in the list to select it and click on **Finish >**.
- Click on **Further Details**.

Swift - Maintaining Providers and Provisions - Attaching Offerings to a Provider


- Click on .

The following screen will be displayed:



There may already be offerings set up for the Organisation.

Note: the Provider should have an Available From date recorded on this screen. If there is no date entered, please record the date the Organisation became a Provider, or if this date is not known, the start date of the current financial year.

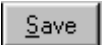
- Press .
- Complete the following fields:

Service

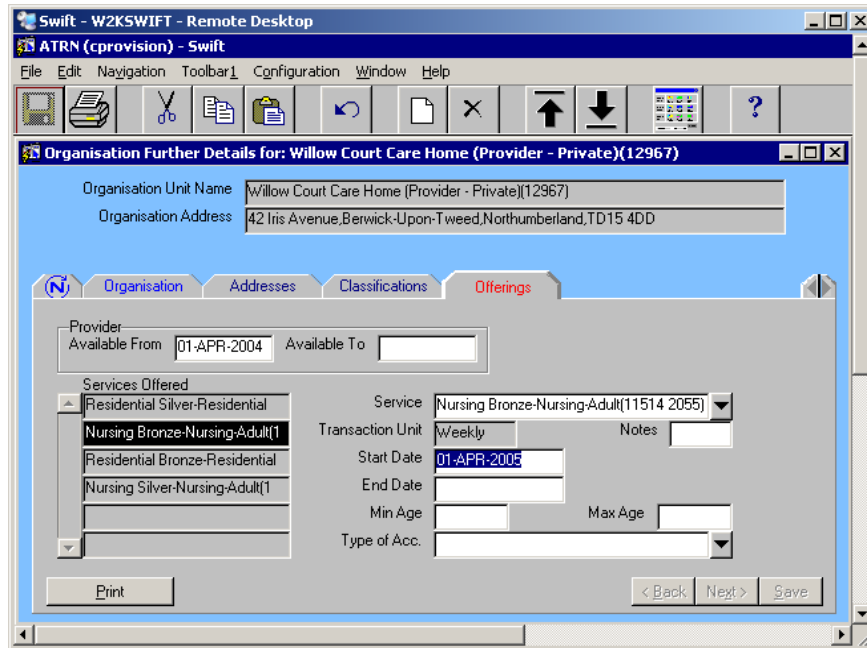
Enter the Care Item you wish to attach to the Provider. The Care Item is entered via the drop down list. Refer to *Maintaining Providers and Provisions - About Provisions - Searching for a Care Item* section of this manual.

Start Date

Enter the date the Provider is first available to provide **this service**.

- Click on .
- If there are more Offerings for the same Provider you must repeat this process until all Offerings are recorded.

The screen should look something like this one:



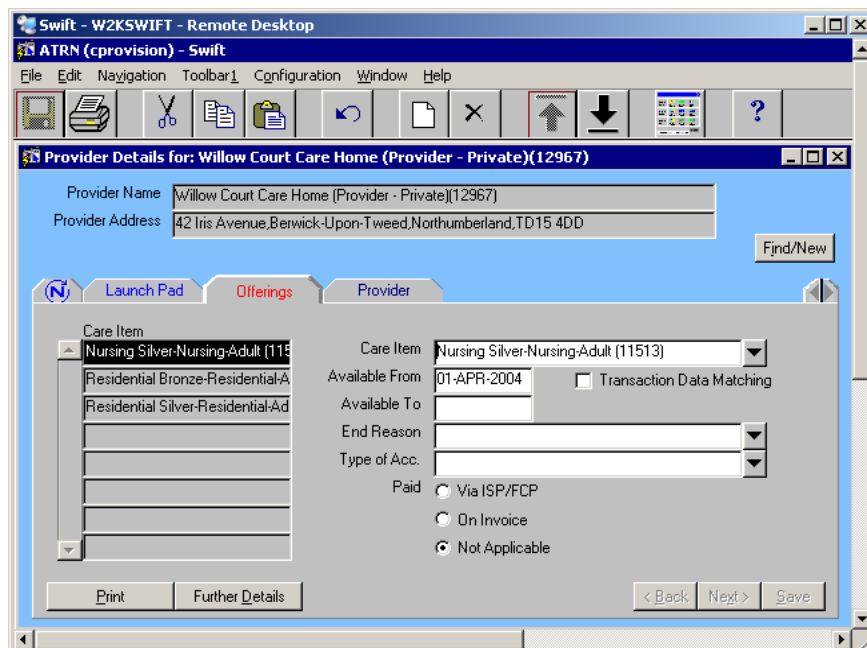
- You now need to set up the rates for the Offering. Refer to *Maintaining Providers and Provisions - Setting Provider Rates* section of this manual.

Attaching Offerings via Maintain Providers




- Access **Maintain Providers** and find the Provider. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Providers* section of this manual.
- Click on **Offerings**

The following screen will be displayed:



There may already be offerings set up for the Organisation.

Swift - Maintaining Providers and Provisions - Attaching Offerings to a Provider


- Press .
- Complete the following fields:

Care Item

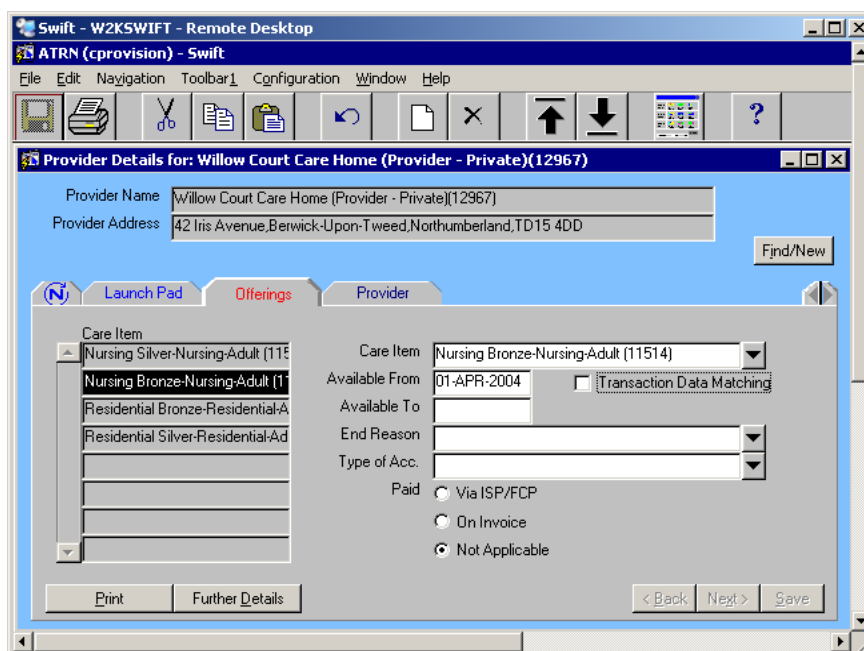
Enter the Care Item you wish to attach to the Provider. The Care Item is entered via the drop down list. Refer to *Maintaining Providers and Provisions - About Provisions - Searching for a Care Item* section of this manual.

Available From

Enter the date the Provider is first available to provide **this service**.

- Click on .
- If there are more Offerings for the same Provider you must repeat this process until all Offerings are recorded.





The screen should look something like this one:



- You now need to set up the rates for the Offering. Refer to *Maintaining Providers and Provisions - Setting Provider Rates* section of this manual.

Attaching Offerings via Maintain Care Items



- Access  and find the Care Item. Refer to *Maintaining Providers and Provisions – Accessing Maintain Care Item* section of this manual.
- Click on .
- Click on  (Offering)
- Press .
- Complete the following fields:

Provider

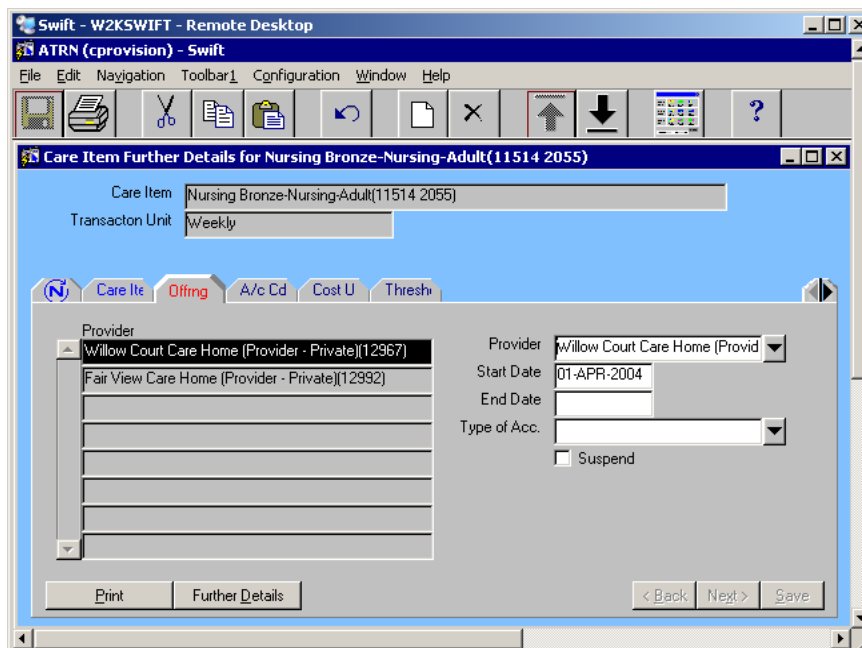
Enter the Provider. Refer to the *Costed Packages of Care manual - About the Provisions Screen - Searching for a Provider* section of this manual.

Start Date

Enter the date the Provider is first available to provide **this service**.

- Click on .

The screen should look something like this one:



- If there are more Offerings for the same Provider you must return to the Care Items screen, select the relevant Care Item and repeat this process.
- You now need to set up the rates for the Offering. Refer to *Maintaining Providers and Provisions - Setting Provider Rates* section of this manual.

SETTING PROVIDER RATES

About Provider Rates

Once an Offering is attached to a Provider, the rates charged by the Provider need to be set up. A Provider's charge rate falls into two categories:

- ◇ Scheduled Rates for services such as day care and home care where the service can happen some days but not others, e.g. 4 hours of day care 3 days per week.
- ◇ Non Scheduled Rates for services that are continuous, such as Residential Care, or one off, such as one off Care Management Budget Payments.

A rate needs to be entered for **all** Offerings. If the Care Item has been identified as one where alternative costs will be entered then a rate of £0.01 needs to be set up.

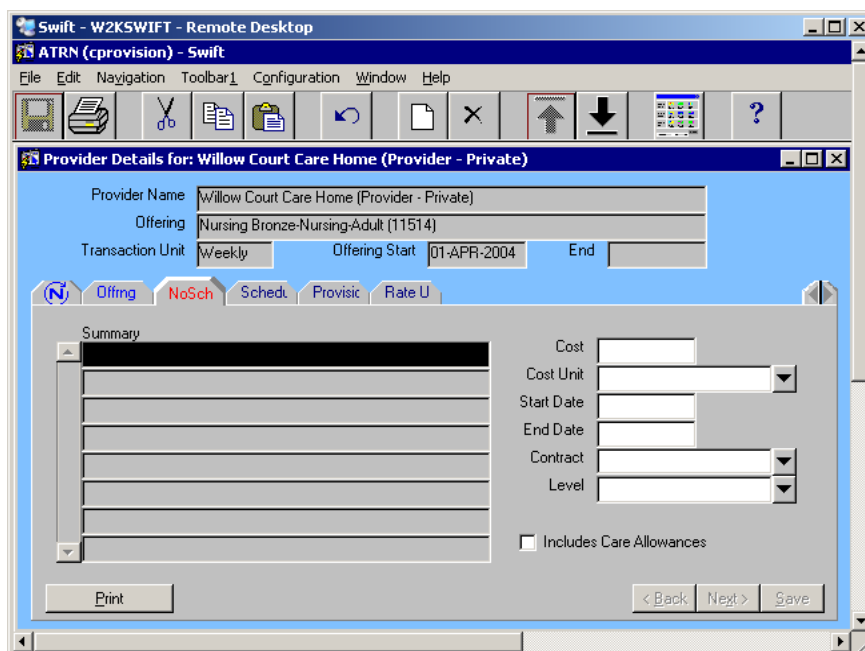
Provider rates can be set up via the Maintain Providers module or the Maintain Care Items module. Which module is used depends upon where you are in Swift when you are ready to set the Provider rates.

Setting the Provider Rates Via Maintain Care Item Module



- Access **Maintain Care Items** and find the Care Item. Refer to *Maintaining Providers and Provisions – Accessing Maintain Care Item* section of this manual.
- Click on **Further Details**.
- Click on **Offrng** (Offering)
- Select the Provider you require and then click on **Further Details**.

The screen should look something like this one:




- You now need to set the rate:
 - If the Offering is a Non Scheduled service, refer to *Maintaining Providers and Provisions - Setting Provider Rates - Setting Non Scheduled Provider Rates* section of this manual.
 - If the Offering is a Scheduled service, refer to *Maintaining Providers and Provisions - Setting Provider Rates - Setting Scheduled Provider Rates* section of this manual.

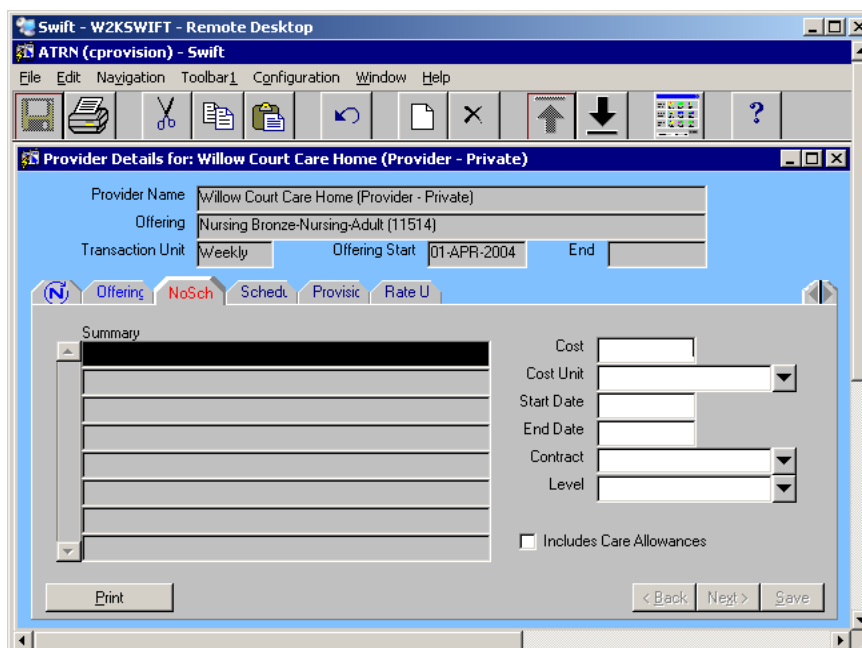
Setting the Provider Rates Via Maintain Providers



- Access **Maintain Providers** and find the Provider. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Providers* section of this manual.
- Click on **Offerings**.

- There may be more than one Care Item in the summary list on the left. Click on the relevant Care Item.
- Click on .

The screen should look something like this one:

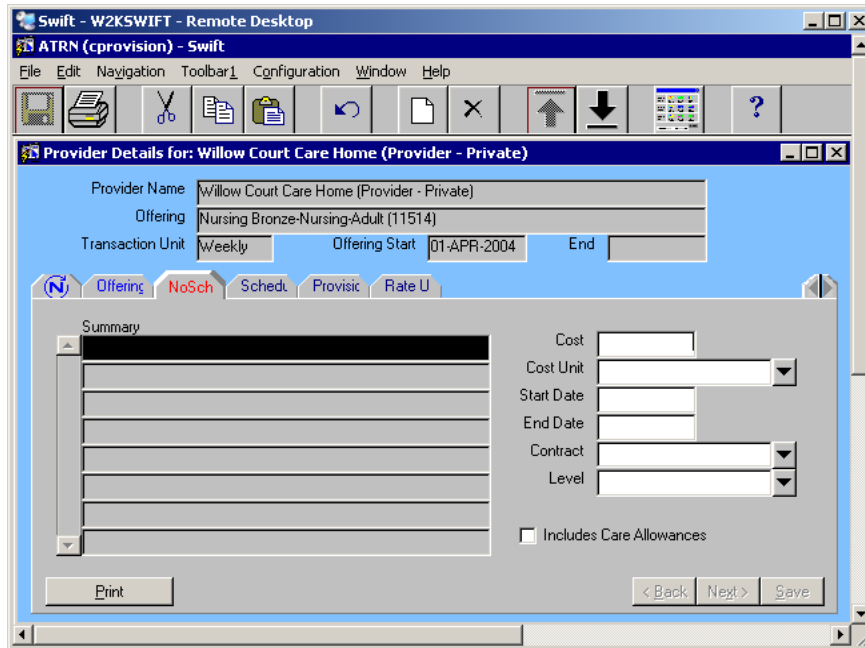


- You now need to set the rate.
 - If the Offering is a Non Scheduled service, refer to *Maintaining Providers and Provisions - Setting Provider Rates - Setting Non Scheduled Provider Rates* section of this manual.
 - If the Offering is a Scheduled service, refer to *Maintaining Providers and Provisions - Setting Provider Rates - Setting Scheduled Provider Rates* section of this manual.

Setting Non Scheduled Provider Rates

- Click on  (Non Schedule).

The following screen will be displayed:



- Complete the following fields:

Cost

Enter the cost per unit. If the Care Item is an alternative cost, enter **0.01**.

Cost Unit

Enter the cost unit.

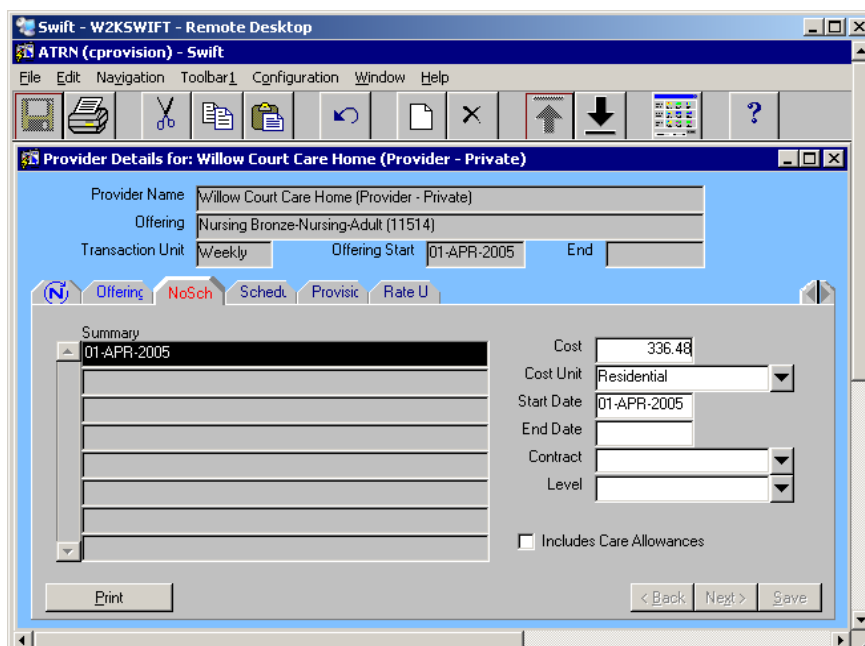
Note: all residential, nursing and short break care provisions must be set up with Residential as the Cost Unit.

Start Date

Enter the Start Date.

- Click on 

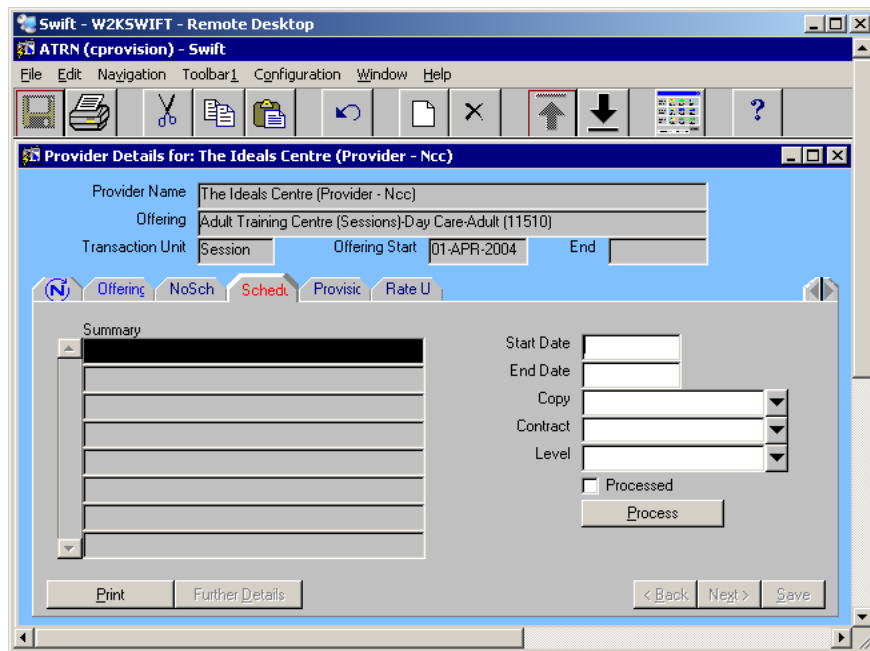
The screen should look something like this one:



Setting Scheduled Provider Rates

- Click on **Sched** (Schedule).

The following screen will be displayed:

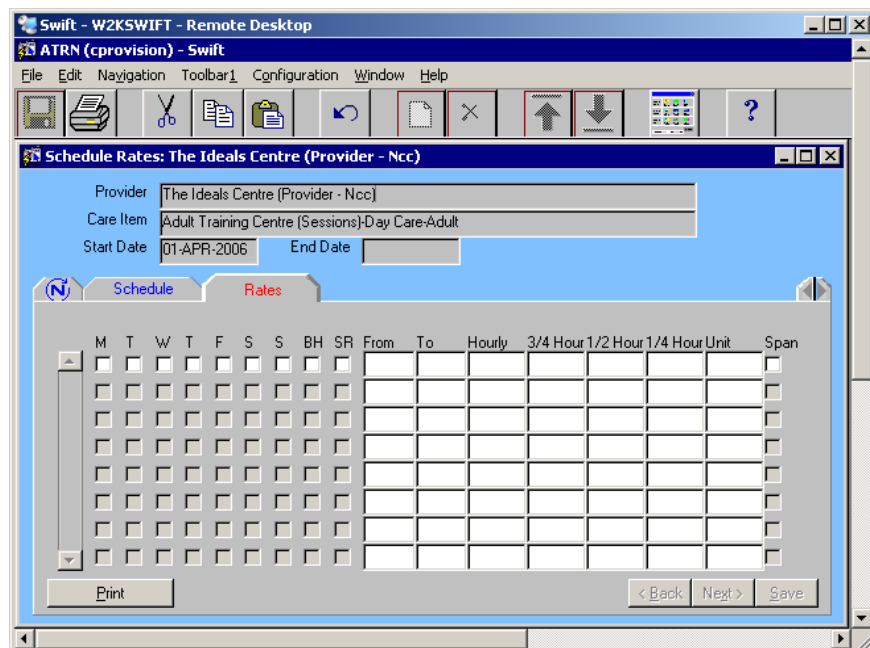


- Enter a start date.

Note: do not click on Process you only need to use this when uplifting costs of existing Scheduled rates.

- Click on **Save**.
- Click on **Further Details**.

The following screen will be displayed:



- Press **F6**.


- Complete the following fields:

Days Tick Boxes

Click in each of the days that have the same rate of charge.

Note: BH and SR fields relate to Bank Holidays and Special Dates.

If the charge for Bank Holidays is the same as for any other day you do not need to record anything for BH or SR but should tick the M – S days of the week.

If the charge for Bank Holidays/Special Dates will be different, you must press  to create a new line and tick all of the boxes on the line, i.e. M – S, BH and SR.

From

For services costed by the amount of time, enter 00:00 (leave this field blank if the service is costed by Units).

To

For services costed by the amount of time, enter 23:59 (leave this field blank if the service is costed by Units).

Hourly

For services costed by the amount of time, enter the rate per hour (leave this field blank if the service is costed by Units).

$\frac{3}{4}$ Hour

For services costed by the amount of time, enter the rate per $\frac{3}{4}$ hour (leave this field blank if the service is costed by Units).

$\frac{1}{2}$ Hour

For services costed by the amount of time, enter the rate per $\frac{1}{2}$ hour (leave this field blank if the service is costed by Units).

$\frac{1}{4}$ Hour

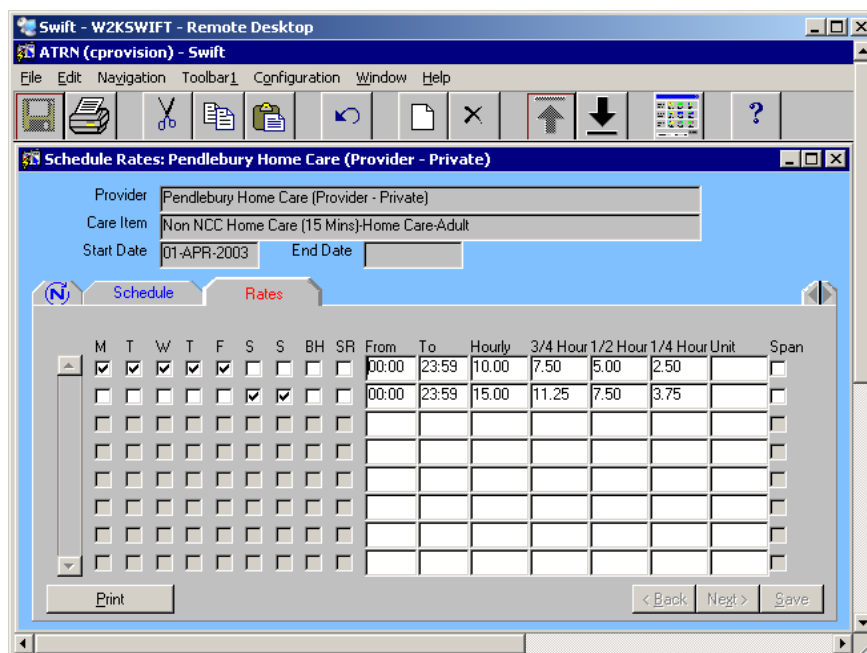
For services costed by the amount of time, enter the rate per $\frac{1}{4}$ hour (leave this field blank if the service is costed by Units).

Unit

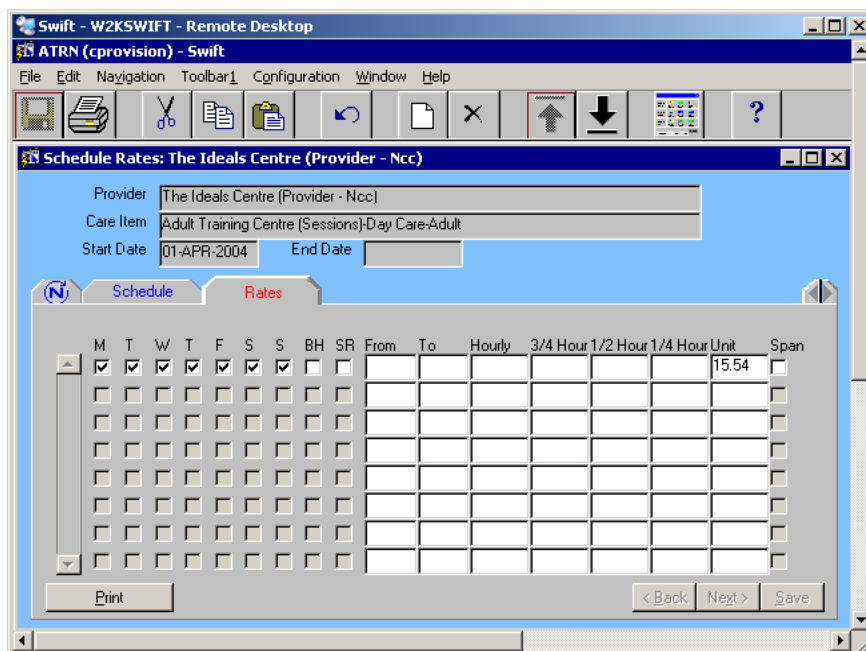
If the service is to be costed by Units, enter the rate per unit or **0.01** if the Care Item is an alternative cost (leave this field blank if the service is costed by the amount of time).

Note: if the rate of charge is different for some days, for example if the charge is higher for weekends, you need to create a new line and complete it as previously outlined.

- Click on .



In this example the home care is costed by the amount of time and there are two rows because the charge rate is different for weekends.



In this example the cost of this provision is £15.54 per session.

Linking Care Item to Financial Assessments Module

If the Care Item is for residential, nursing or short break care, you must link it to the Financial Assessments module.

The Care Item will need to be linked to all three of the following Financial Assessment Types:

- ◇ Long Term Residential Admission.
- ◇ Section 117 Mental Health Act Admission.
- ◇ Temporary Residential Admission.

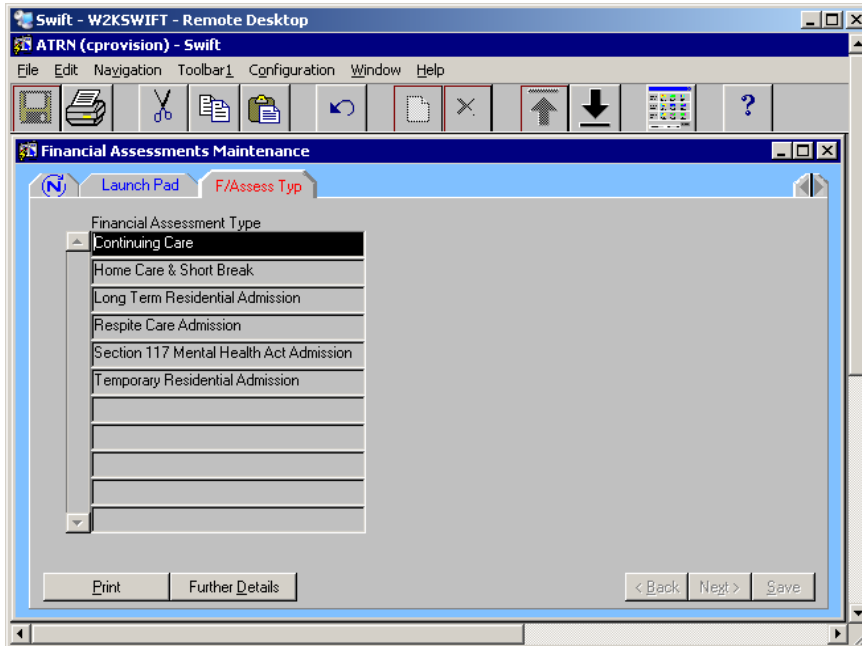
Swift - Maintaining Providers and Provisions - Setting Provider Rates

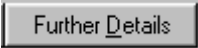
Note: the exception to this is Continuing Care. If the Care Item is for Continuing Care, then the Care Item must be linked only to the Continuing Care Financial Assessment type.



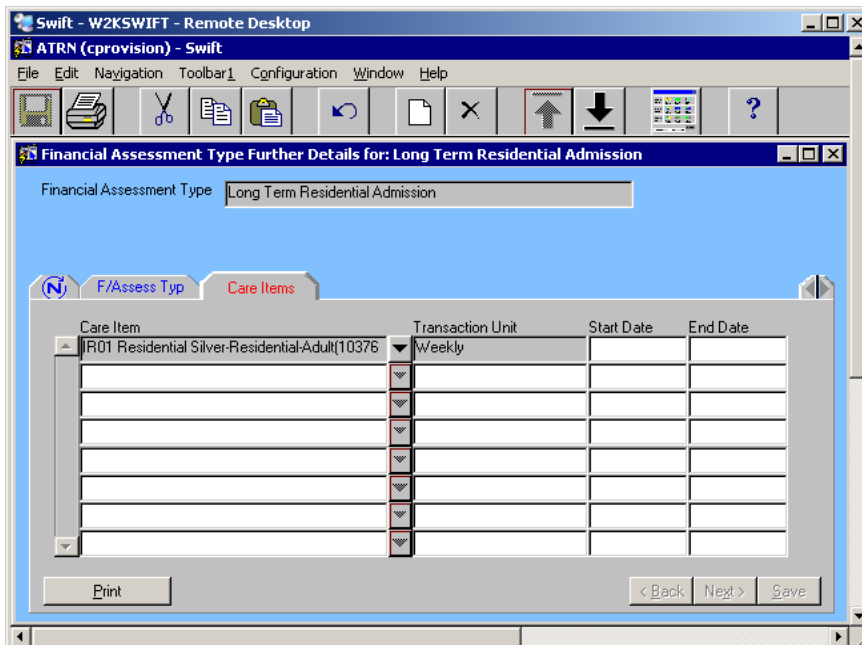
- From Launch Pad click on .

The following screen will be displayed:



- Click on the Financial Assessment Type you wish to link to the Care Item.
- Click on .

The following screen will be displayed:



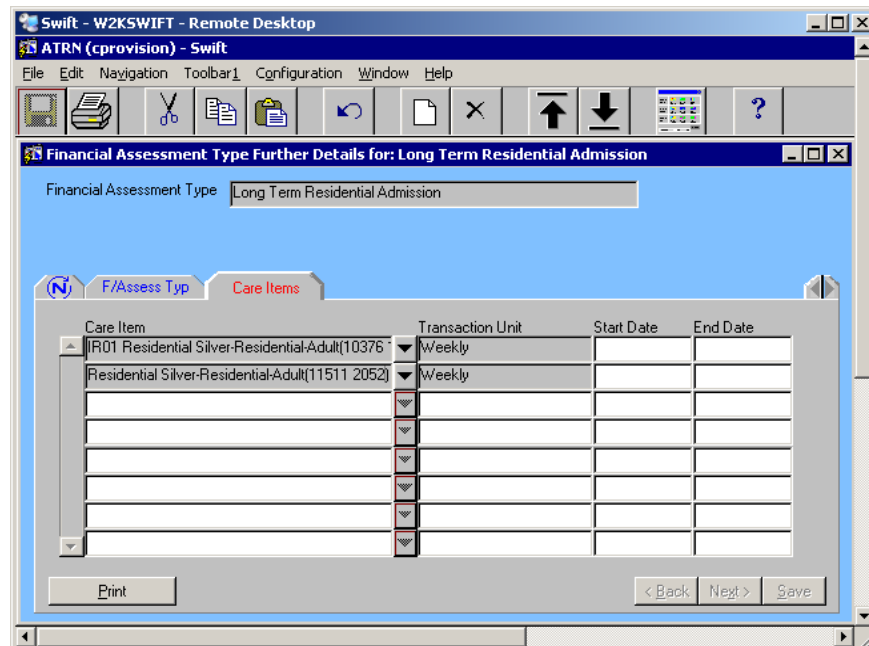
- Click press .

- Enter the Care Item. The Care Item is entered via the drop down list. Refer to *Maintaining Providers and Provisions - About Provisions - Searching for a Care Item* section of this manual.

Note: the Transaction Unit will automatically complete when you have selected the Care Item.

- Click on

The following screen will be displayed:



- Click on (Financial Assessment Type).and repeat the above until the Care Item has been linked to all Financial Assessment Types necessary.

UPDATING PROVIDER RATES

When the rate entered against a Provider's Offering changes this needs to be reflected in Swift. There are several ways of updating Provider rates, and this is very much dependent upon whether it is a Scheduled or Non Scheduled rate and whether other Providers' rates are also changing.

Note: for non scheduled provisions it is not possible to record an uplift which precedes another uplift, i.e. one that is backdated. If this situation arises, and a client record needs to reflect a different cost for a date prior to the uplift, contact Systems Support section for advice.

If you have more than one uplift to enter for the same offering, e.g. if you need to record a rate increase from 1/4/07 and then t another increase from 1/6/07, you must not try to enter these both at once. Instead, you must enter the first uplift with no end date and process it before you enter the next rate.

This manual gives instruction on the following scenarios:

- ◇ Non Scheduled Rate Change for All Providers
- ◇ Change in Rate for individual Clients/Providers (this is where a new Care Item would need to be created and reflected on the clients' care plans)

- ◇ Non Scheduled Rate Change for Individual Providers
- ◇ Scheduled Rate Change for Individual Providers

Note: there is not currently a way of updating Scheduled rates for all Providers.

If the rate update will affect over 50 client provisions you must contact the Computer Services to arrange for the updates to be processed overnight.

Non Scheduled Rate Change for All Providers

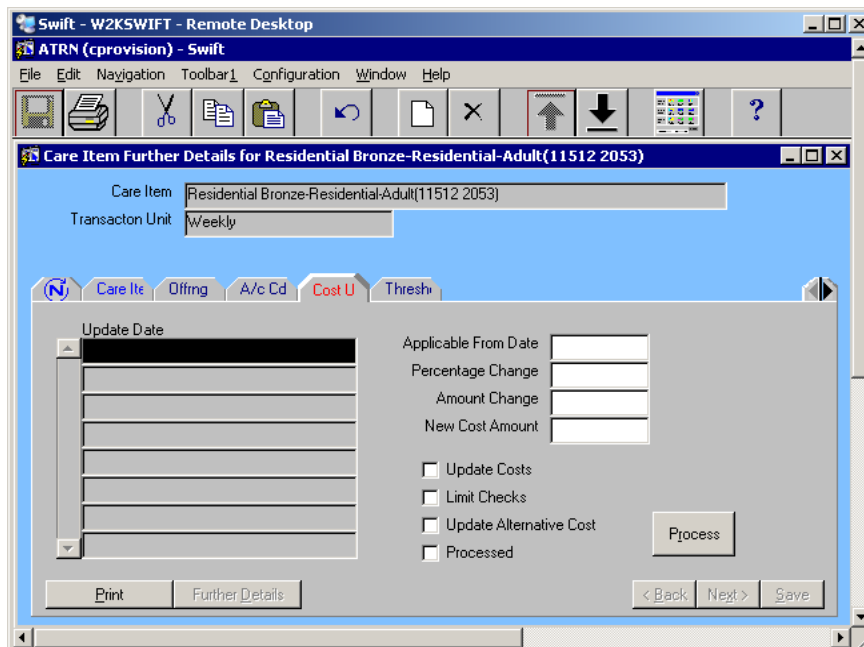
If the cost of an Offering is to be the same for all Providers, you can change the cost of the Offering via Maintain Care Item to change all of the Providers' rates at the same time.

Changing the cost of an Offering will automatically update the costs against client records in the Client Provisions module.



- Access **Maintain Care Items** and find the Care Item. Refer to *Maintaining Providers and Provisions – Accessing Maintain Care Item* section of this manual.
- Click on the appropriate Care Item in the summary list.
- Click on **Further Details**.
- Click on **Cost U** (Cost Update).

The following screen will be displayed:



- If previous update records exist, press **F6** to generate a new row.
- Complete the following fields:

Applicable From Date

Enter the date that the new cost begins.

New Cost Amount

Enter a new cost amount, e.g. to change all the Providers' costs to £360.15.

Swift - Maintaining Providers and Provisions - Updating Provider Rates

Note: you **must** ensure that you enter the new cost into the correct field
There is another field, Percentage Change field, which can be used to change the cost by a percentage, e.g. to change the costs for all the Providers 3.25%, however this field will rarely be used.

Update Costs

Tick this box to automatically update the Providers' and client provisions costs.

Note: Update Costs must be ticked before you can save.


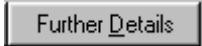

- Click on .

At this stage, the information has been saved but client provisions linked to the service will not reflect the change as it has not been processed.




If the change will affect a large number of client provisions i.e. more than 50, you must not process it during office hours – you must contact Computer Services to arrange for the updates to be processed overnight. Check the number of Providers attached to the Care Item and the number of clients that are using the provision.



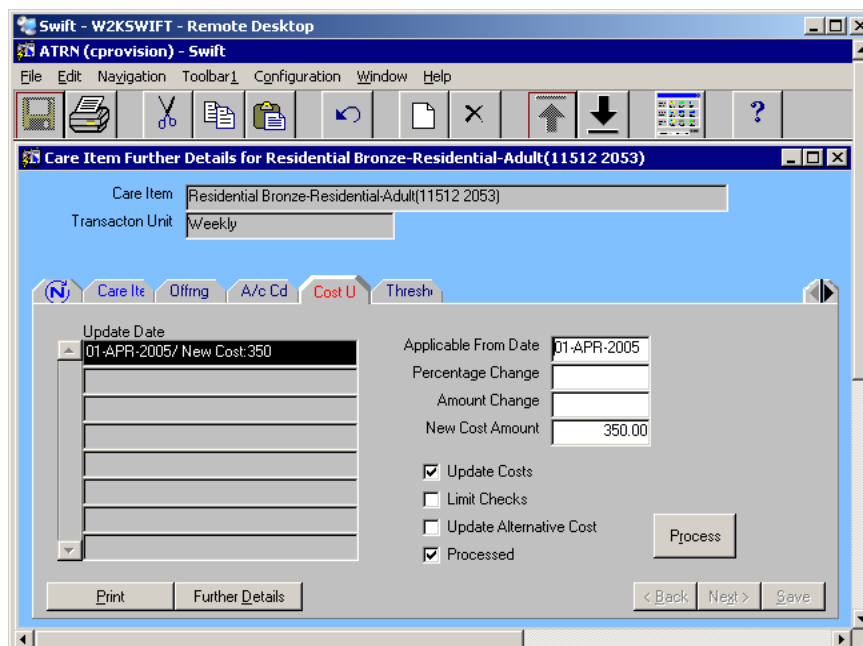
To check the number of Providers with this Offering, click on  (Offering). Once you are on the Offering screen you can check the number of clients, by clicking on a Provider, clicking on  then clicking on .

- Check that the details of the change are correct before proceeding.

Note: checking the details is very important because the next step will be to process the change, but once you click on Process you will not be able to undo the change.

- If the change is to be processed at this point click on . A tick will appear in the Processed box after the change has been successfully processed.

The screen should look something like this:



The screenshot shows a software window titled "Swift - W2KSWIFT - Remote Desktop" with a sub-window "ATRN (cprovision) - Swift". The main window is "Care Item Further Details for Residential Bronze-Residential-Adult(11512 2053)". It features a menu bar (File, Edit, Navigation, Toolbar, Configuration, Window, Help) and a toolbar with various icons. The main content area shows "Care Item: Residential Bronze-Residential-Adult(11512 2053)" and "Transaction Unit: Weekly". Below this are tabs for "Care It", "Offng", "A/c Cd", "Cost U", and "Thresh". A table lists update dates, with the first entry being "01-APR-2005/ New Cost:350". To the right, there are input fields for "Applicable From Date" (01-APR-2005), "Percentage Change", "Amount Change", and "New Cost Amount" (350.00). Checkboxes for "Update Costs" (checked), "Limit Checks", "Update Alternative Cost", and "Processed" (checked) are present. A "Process" button is located at the bottom right. Other buttons include "Print", "Further Details", "< Back", "Next >", and "Save".

- You must now check whether any errors have occurred during the processing of the batch. To do this you need to access the Errors screen in the View Rate Updates module. Refer to Maintaining Providers and Provisions – Updating Provider Rates – Viewing Rate Updates section of this manual.
- It is advisable to access the report “Care Offering without any unit costs” in the Exception Report factory to check that the cost has actually been entered on Swift. There should be no Care Offerings on this report as this would indicate that the costs had not been set up on Swift. If there are any listed you should update Swift with the cost details.

Non Scheduled Rate Change for Individual Providers

You can change an individual Provider’s rate for non scheduled services.

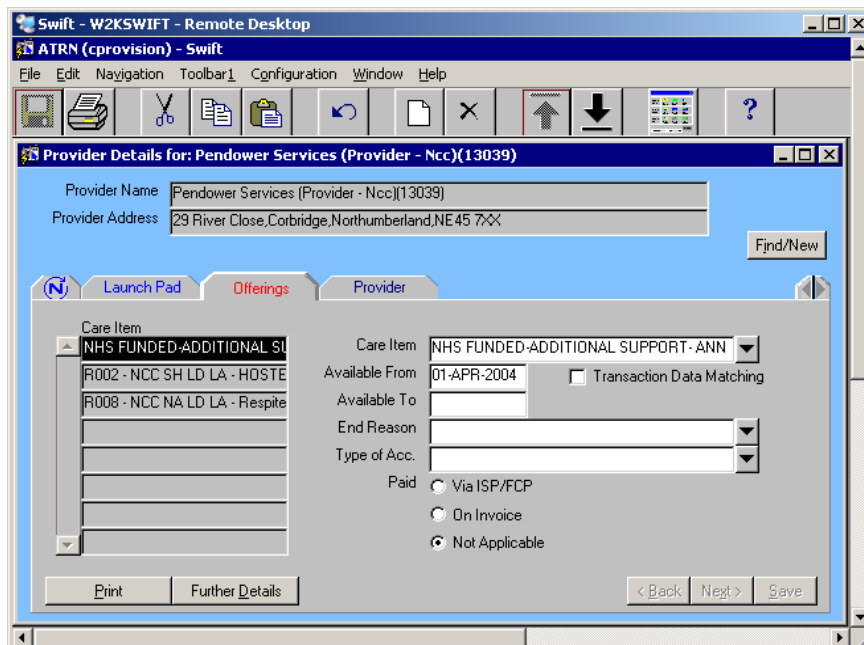
Note: this option should not be used for residential care and nursing care. To change the rate for residential care and nursing care you should use Maintain Care Item. Refer to Maintaining Providers and Provisions - Non Scheduled Rate Change for All Providers section of this manual. This is so that you can ensure that there is only one Provider attached to the Care Item before you change the rate.



- Access **Maintain Providers** and find the Provider. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Providers* section of this manual.

- Click on **Offerings**.


The screen should look something like this one:



- There may be more than one Care Item in the summary list on the left. Click on the relevant Care Item.
- Click on **Further Details**.
- Click on **Rate U** (Rate Update).

The following screen will be displayed:

The screenshot shows the 'Provider Details for: Pendower Services (Provider - Ncc)' window. The 'Rate U' tab is selected. The 'Update Date/Change' field contains '01-APR-2005/New cost: 5'. The 'Applicable From Date' is '01-APR-2005'. The 'New Cost Amount' is '5250.34'. The 'Process' button is visible at the bottom.

- If previous update records exist, press  to generate a new row.
- Complete the following fields:

Applicable From Date

Enter the date that the new cost begins.

New Cost Amount

Enter a new cost amount, e.g. to change all the Providers' costs to £360.15.

Note: you **must** ensure that you enter the new cost into the correct field

There is another field, Percentage Change field, which can be used to change the cost by a percentage, e.g. to change the costs for all the Providers 3.25%, however this field will rarely be used.

Update Costs

Tick this box to automatically update the Provider's and costs and client provisions.

Note: Update Costs must be ticked before you can save.

- Click on .

The screen should look something like this one:

The screenshot shows a remote desktop window titled 'Swift - W2K5WIFT - Remote Desktop'. Inside, there's a window titled 'ATRN (cprovision) - Swift' with a menu bar (File, Edit, Navigation, Toolbar1, Configuration, Window, Help) and a toolbar. Below that is a window titled 'Provider Details for: Pendower Services (Provider - Ncc)'. This window has several tabs: 'Offering', 'NoSch', 'Sched', 'Provisic', and 'Rate U'. The 'Rate U' tab is selected. It contains the following fields and controls:

- Provider Name: Pendower Services (Provider - Ncc)
- Offering: NHS FUNDED-ADDITIONAL SUPPORT-ANNUAL COST-Other Services-Adult
- Transaction Unit: Annually
- Offering Start: 01-APR-2004
- End: (empty)

Under the 'Rate U' tab, there are several sections:

- Update Date/Change:** A list box showing '01-APR-2005/New cost: 5' and '01-APR-2006/New cost: 5'.
- Applicable From Date:** 01-APR-2006
- Percentage Change:** (empty)
- Amount Change:** (empty)
- New Cost Amount:** 5460.70
- Contract:** (dropdown menu)
- Level:** (dropdown menu)
- Update Costs:**
- Limit Checks:**
- Update Alternative Cost:**
- Include Care Allowances:**
- Processed:**

At the bottom, there is a 'Process' button, a 'Print' button, and navigation buttons '< Back', 'Next >', and 'Save'.

At this stage, the information has been saved but client provisions linked to the service will not reflect the change as it has not been processed.



If the change will affect a large number of client provisions i.e. more than 50, you must not process it during office hours – you must contact Computer Services to arrange for the updates to be processed overnight. Check the number of Providers attached to the Care Item and the number of clients that are using the provision.



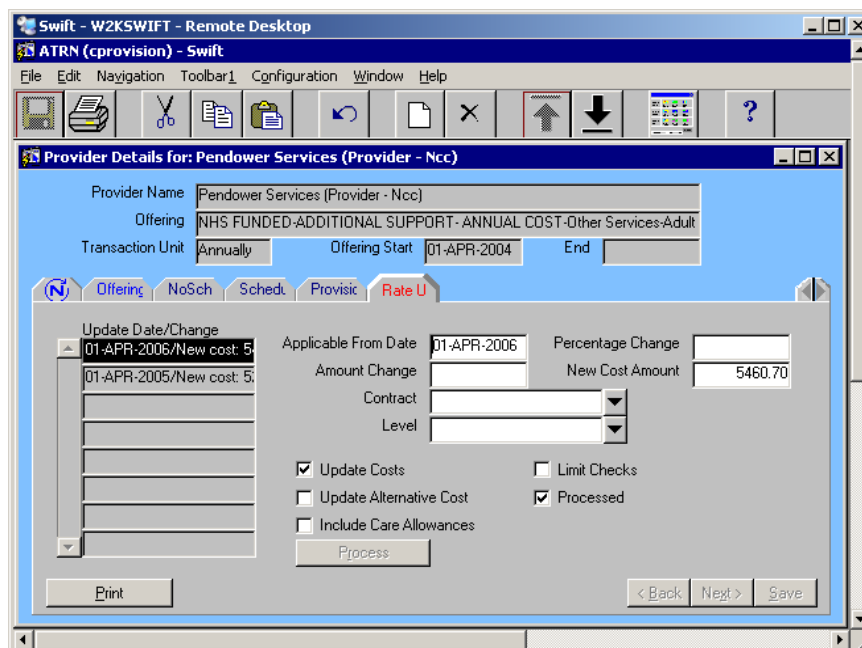
To check the number of clients using a provision, click on **Provisic**.

- Check that the details of the change are correct before proceeding.

Note: checking the details is very important because the next step will be to process the change, but once you click on Process you will not be able to undo the change.

- If the change is to be processed at this point click on **Process**. A tick will appear in the Processed box after the change has been successfully processed.

The screen should look something like this one:



- You must now check whether any errors have occurred during the processing of the batch. To do this you need to access the Errors screen in the View Rate Updates module. Refer to Maintaining Providers and Provisions – Updating Provider Rates – Viewing Rate Updates section of this manual.
- It is advisable to access the report “Care Offering without any unit costs” in the Exception Report factory to check that the cost has actually been entered on Swift. There should be no Care Offerings on this report as this would indicate that the costs had not been set up on Swift. If there are any listed you should update Swift with the cost details.



Viewing Rate Updates

The *View Rate Updates* module should be used to check rates updates for any errors on processing or to ensure that all rate updates recorded on Swift have been processed.

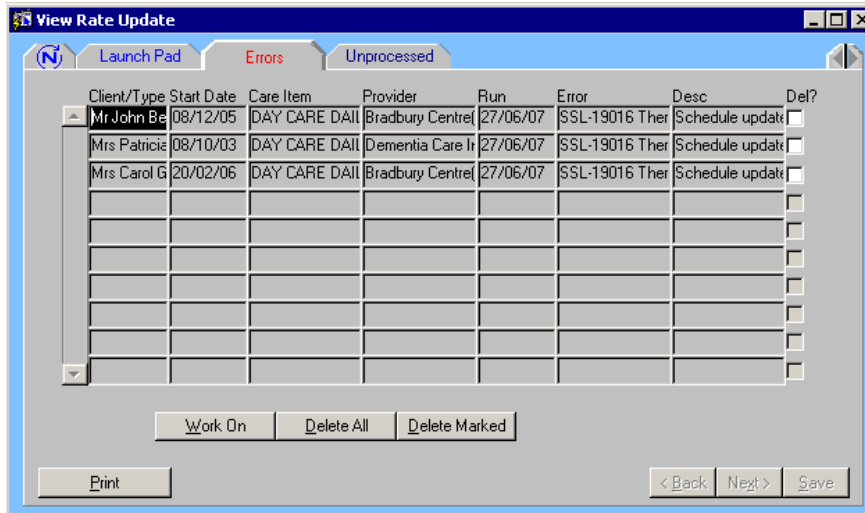
Errors on Updates

The Errors screen displays a list of all client records (Schedules or Non Schedules) that have not been updated when the batch rate update process took place. Each client record will need to be corrected and then deleted from this screen.



- From Launch Pad click on .
- Click on .

The following screen will be displayed:



- If there are any errors displayed, you must contact Computer Services and request assistance in rectifying the error and then deleting it from the list on the Errors screen.

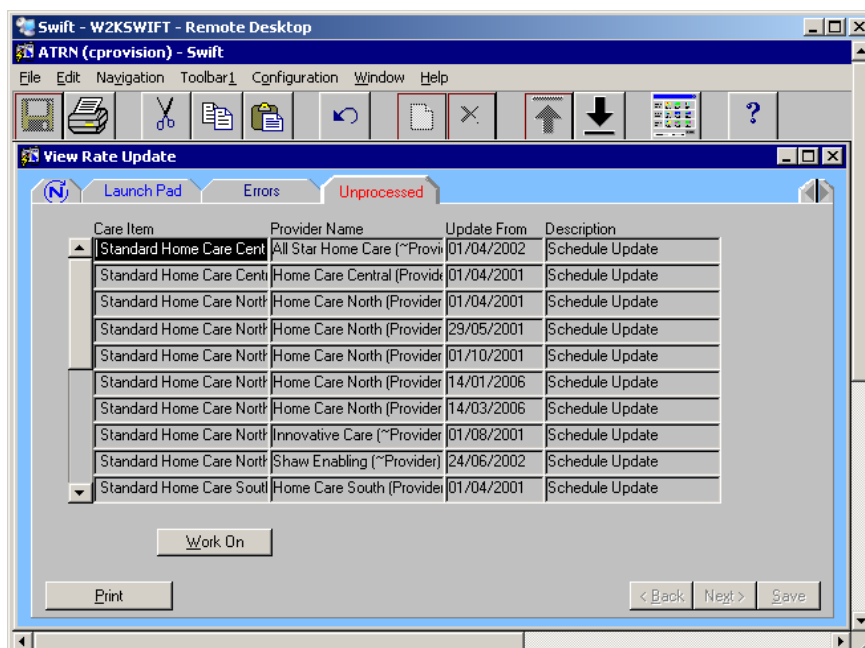
Unprocessed Updates

The Unprocessed screen displays a list of all information that has yet to be processed so that you can identify where someone may have forgotten to process a rate update.




- From Launch Pad click on [View Rate Updates](#).
- Click on [Unprocessed](#).

The following screen will be displayed:






Note: each of these will need to be investigated to establish whether someone had simply forgotten to process it, or there was a genuine reason for the update not to be processed, e.g. if there was a query which needed to be resolved before the update is processed.

- Click on  to move to the No Sch or Schedule screen, depending on the type of provision.
- If there are no outstanding queries, proceed with the update. Refer to *Maintaining Providers and Provisions – Updating Provider Rates* section of this manual.

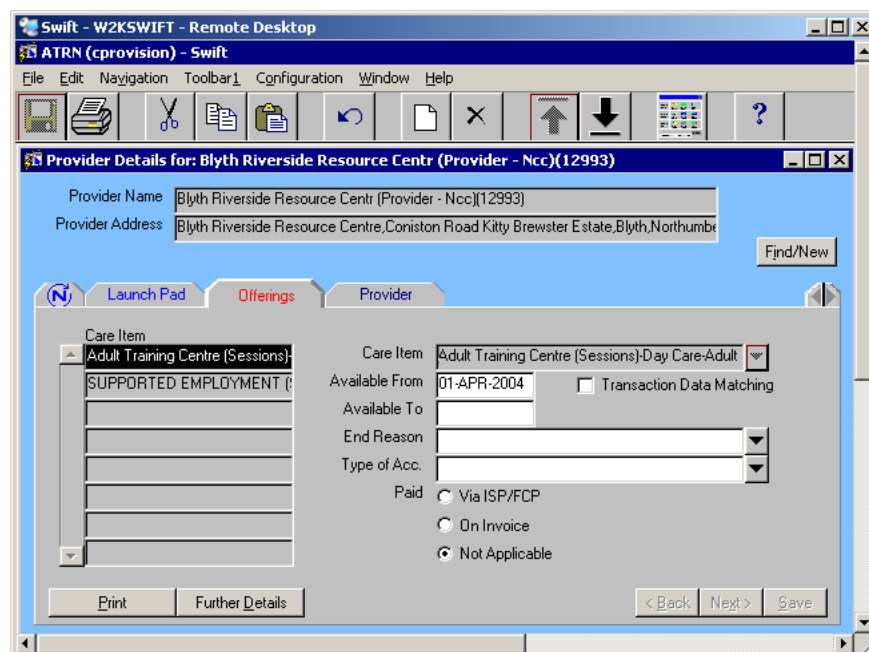
Scheduled Rate Change



There is no facility on Swift for changing the cost for all Providers of scheduled services such as day care and home care, therefore rate changes have to be made against individual Providers as follows.



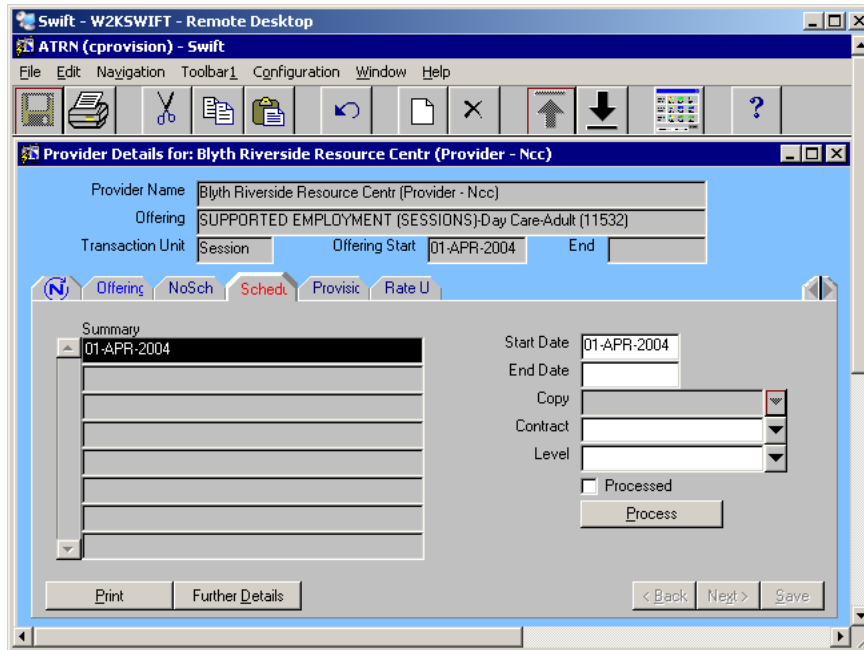
- Access  and find the Provider. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Providers* section of this manual.
- Click on .
- Click on .

The screen should look something like this one:





- There may be more than one Care Item in the summary list. Click on the relevant Care Item.
- Click on .
- Click on  (Schedule).

The following screen will be displayed:



- Click on the current schedule rate in the summary list.
- Enter an end date for this schedule.

Note: there cannot be any overlap between the end date of the previous schedule and the start date of the new schedule so this date should be the day before the start date of the new cost.

- Click on .
- Press  to create a new line for the new schedule.
- Complete the following fields:



Start Date

Enter a start date.

Note: as there cannot be any overlap between the end date of the previous schedule and the start date of the new schedule this date should be the day after the end date of the previous cost.

Copy Schedule

Do not use this option. If you use this facility, Swift will only copy the tick boxes, but leave the rest of the fields blank, therefore you would not gain anything by copying the days of a previous schedule.

- Click on .
- Click on .

The following screen will be displayed:

The screenshot shows a software window titled "Schedule Rates: Blyth Riverside Resource Centr (Provider - Ncc)". It contains the following fields and controls:

- Provider: Blyth Riverside Resource Centr (Provider - Ncc)
- Care Item: SUPPORTED EMPLOYMENT (SESSIONS)-Day Care-Adult
- Start Date: 01-APR-2005
- End Date: [Empty]

Below the fields are two tabs: "Schedule" and "Rates". The "Rates" tab is active, showing a grid with columns: M, T, W, T, F, S, S, BH, SR, From, To, Hourly, 3/4 Hour, 1/2 Hour, 1/4 Hour, Unit, and Span. The grid contains several empty cells for data entry. At the bottom of the window are buttons for "Print", "< Back", "Next >", and "Save".

- Complete this screen to set up the new rate. Refer to *Maintaining Providers and Provisions - Setting the Provider Rates* section of this manual.

- Click on .

- Click on .

At this stage, the information has been saved but client provisions linked to the service will not reflect the change as it has not been processed.

- Select the new rate by clicking on it in the summary list.



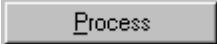
If the change will affect a large number of client provisions i.e. more than 50, you must not process it during office hours – you must contact Computer Services to arrange for the updates to be processed overnight. Check the number of clients that are using the provision.



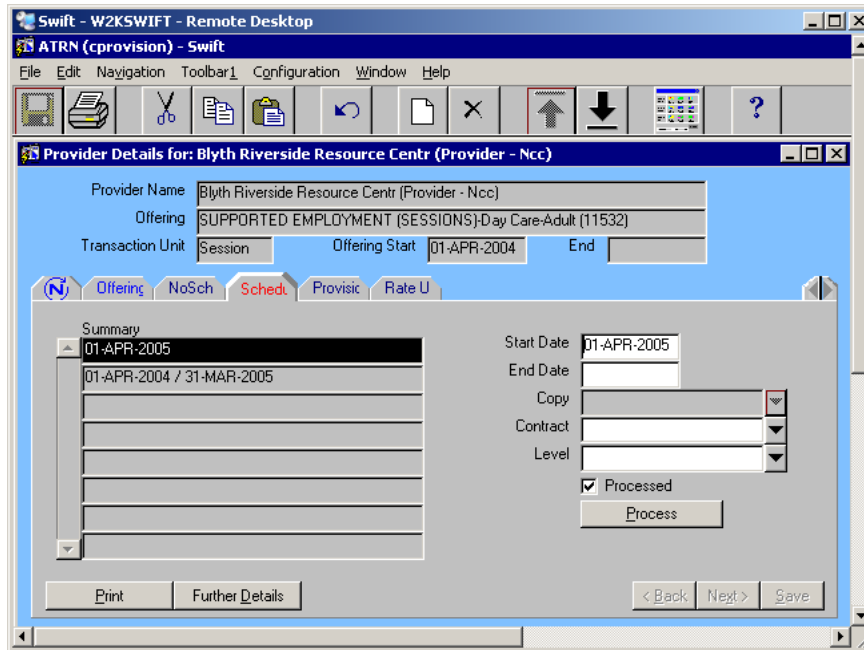
To check the number of clients using a provision, click on .

- Check that the details of the change are correct before proceeding.

Note: checking the details is very important because the next step will be to process the change, but once you click on Process you will not be able to undo the change.

- If the change is to be processed at this point click on . A tick will appear in the Processed box after the change has been successfully processed.

The screen should look something like this:



- You must now check whether any errors have occurred during the processing of the batch. To do this you need to access the Errors screen in the View Rate Updates module. Refer to *Maintaining Providers and Provisions – Updating Provider Rates – Viewing Rate Updates* section of this manual.
- It is advisable to access the report “Care Offering without any unit costs” in the Exception Report factory to check that the cost has actually been entered on Swift. There should be no Care Offerings on this report as this would indicate that the costs had not been set up on Swift. If there are any listed you should update Swift with the cost details.

Amending an Update to Provider Rates

Correcting a Rate from the Previous Uplift

Non Scheduled Services

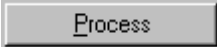
To correct the rate which is recorded for a non scheduled service:



- Access **Maintain Care Items** and find the Care Item. Refer to *Maintaining Providers and Provisions – Accessing Maintain Care Item* section of this manual.
- Move to the appropriate screen to make the correction:
 - If you are correcting a rate for all Providers, click on the Cost Update screen.
 - If you are correcting a rate for an individual Provider, select the Provider from the Offering screen and then click on **Further Details**.
- Press **F6** and record the same start date as the incorrect previous uplift and the correct rate.



If the change will affect a large number of client provisions i.e. more than 50, you must not process it during office hours – you must contact Computer Services to arrange for the updates to be processed overnight. Check the number of Providers attached to the Care Item and the number of clients that are using the provision.

- If the change is to be processed at this point click on . A tick will appear in the Processed box after the change has been successfully processed.

Once you have clicked on Process, any client records using that provision will automatically pick up the new rate.

Scheduled Services

There is no similar way of correcting costs for scheduled services. If an error is made, then a new rate should be recorded with a different start date.

Inserting an Uplift

Non Scheduled Services

For non scheduled provisions it is **not** possible to record an uplift which precedes another uplift, i.e. one that is backdated. If this situation arises, and a client record needs to reflect a different cost for a date prior to the uplift, you will need to tick the Alternative Cost Allowed on the Care Item to enable you to record a new No Sched with an alternative cost on the client record. Then you will need to insert a new No Sched on the Provision for the client. You will need to make sure that the end date of this new No Sched is correct and that the start date of the next No Sched is the day after that start date.

Scheduled Services

For Scheduled provisions it may be possible to record an uplift which precedes another uplift, though this should be avoided if possible.

ENDING PROVIDERS AND PROVISIONS

Ending the Provider

- If an Organisation will no longer be providing services, and is no longer to be registered with CSCI, then an end date must be entered against the Provider. If the Provider is to continue providing some services and only needs specific services ended, refer to Maintaining Providers and Provisions - Ending Providers and Provisions - Ending a Provider's Offerings section of this manual.

Note: when an end date is entered all Offerings attached to the Provider are automatically ended. Ending a Provider will not affect provisions already recorded for the Provider against clients in Swift. It will, however prevent users from recording provisions the Provider offers starting/ending after the Provider end date.

- Check that the Provider's Offerings are not currently in use by any clients. Refer to the *Viewing Providers and Provisions manual - Viewing a list of Clients Receiving a Specific Offering* section of this manual to see if any clients are still using this provision.

- If there are any clients with the Provision ongoing in their record you will need to end the service on the client record as Swift will not automatically end it when you end the Provider.



- Access **Maintain Providers** and find the Provider. Refer to *Maintaining Providers and Provisions - Finding a Provider via Maintain Providers* section of this manual.
- Click on **Provider**.
- Complete the following fields:

Available to

Enter the date the Provider ceased being a Provider.

Suspended

Tick the Suspended field.

Note: when a Provider is suspended from use admin will not be able to use this Provider for recording provisions in the Client Provisions module as the Provider will not appear on the usual list of Providers.

- Click on **Save**.

Ending a Provider's Offerings

- If a Provider no longer provides a certain service, then the Offering can be ended whilst leaving any other Offerings ongoing. It is best to do this via the Maintain Care Items module rather than via Maintain Providers as you will also be able to suspend the Offering for the Provider to remove it from the list of provisions available in Client Provisions.

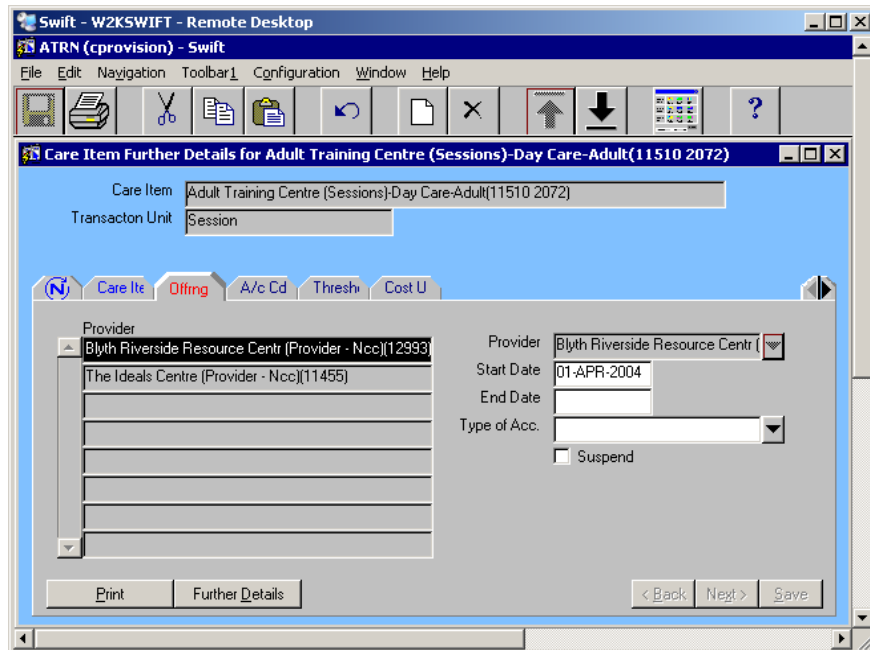
*Note: if a Provider is no longer providing **any** services, then refer to Maintaining Providers and Provisions - Ending Providers and Provisions - Ending the Provider section of this manual.*

- Once an Offering is ended it cannot be entered on a client's record with a start/end date after the Offering end date.
- Before you end an Offering, you must ensure that it is not currently in use by any clients. Refer to *Viewing Providers and Provisions manual - Viewing a list of Clients Receiving a Specific Offering* section of this manual to see if any clients are still using this provision.
- If there are any clients with the Provision ongoing in their record you will need to end the service on the client record as Swift will not automatically end it when you end the Provider Offering.



- Access **Maintain Care Items** and find the Care Item. Refer to *Maintaining Providers and Provisions – Accessing Maintain Care Item* section of this manual.
- Click on **Further Details**.

The Offering screen will be displayed and several Providers may appear in the list:



- Click on the relevant Provider.
- Complete the following fields:

End Date

Enter the date the Provider ceased providing this offering.

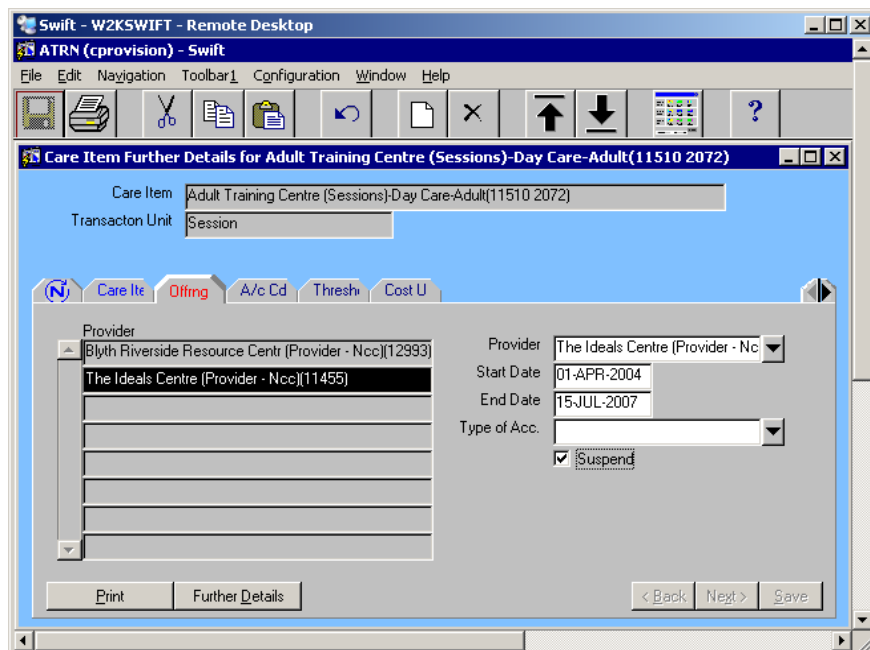
Suspend

Tick the Suspend field.

Note: when an Offering is suspended from use admin will not be able to use this Offering for recording provisions in the Client Provisions module as it will not appear on the usual list of Provisions.

- Click on .

The completed screen should look something like this:



- If there are more Offerings to end you must repeat this process.


ENDING A CARE ITEM

If a Care Item should no longer be used as it relates to a provision that is no longer provided by **any** Providers, then you should remove it from the list of provisions in Client Provisions by amending the Care Item screen.

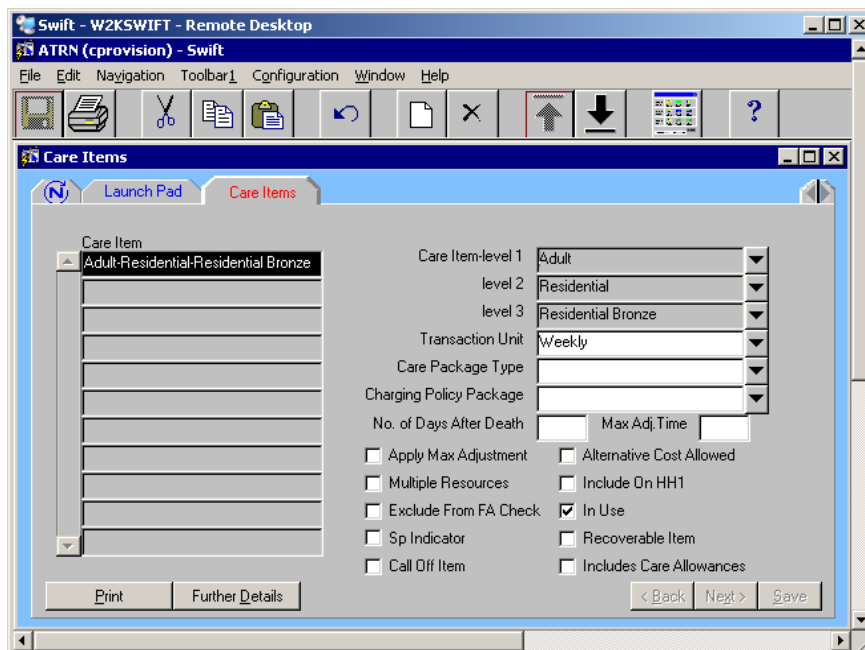
Note: you must be certain that the Care Item is no longer needed for any Providers.


- Before you end a Care Item, you must ensure that it is not currently in use by any clients. Refer to the *Viewing Providers and Provisions manual - Viewing a list of Clients Receiving a Specific Offering* section of this manual to see if any clients are still using this provision.
- If there are any clients using the Care Item you will need to end the service on the client record as Swift will not automatically end it when you end the Care Item.



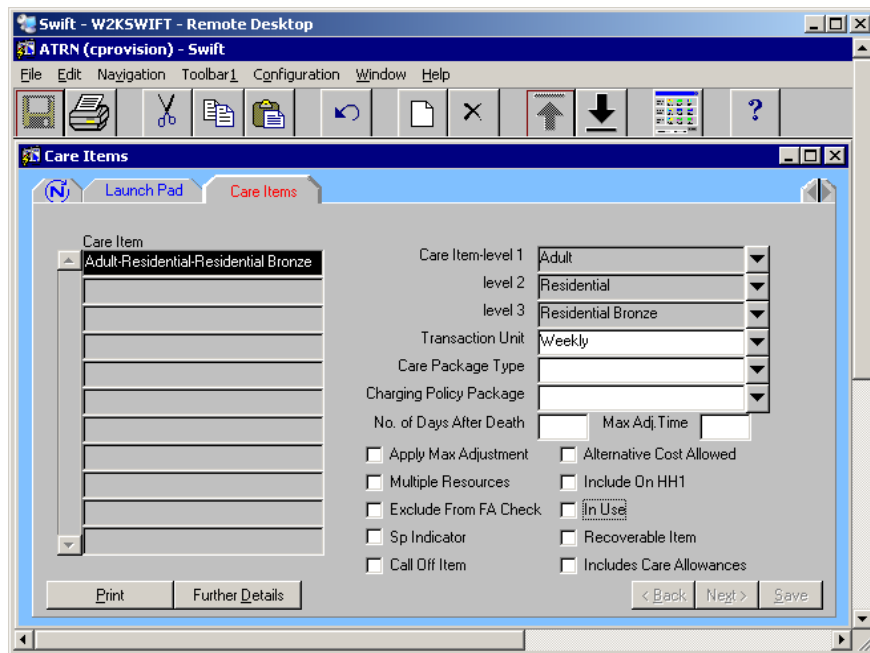
- Access  and find the Care Item. Refer to *Maintaining Providers and Provisions – Accessing Maintain Care Item* section of this manual.

The screen should look something like this one:



- Remove the tick from the In Use box by clicking on it.
- Click on .

The screen should look something like this one:



- The Care Item has now been removed from use and will no longer display in the list of provisions for the Providers which had this as an offering.