

Recording an Involvement of a Person or Worker



- Access **Frontdesk** via Launch Pad and find the client as follows:
- Click on **Find/New**.

The following screen will be displayed:

The screenshot shows a 'Person Search Criteria' dialog box with the following fields and controls:

- Identifier (text box)
- Surname (text box)
- First Names (text box)
- Approx/Act DOB (text box)
- Age In Years (text box)
- Gender (dropdown menu)
- Referral Range: From (text box)
- To (text box)
- Search Remote (checkbox)
- Premise Name (text box)
- Premise Number (text box)
- Town (text box)
- Ad.Area/County (dropdown menu)
- Team (dropdown menu)
- Class (dropdown menu)
- Client Cat. (dropdown menu)
- Client Security (dropdown menu)
- Client SS? (dropdown menu)
- SP? (dropdown menu)
- Worker? (dropdown menu)
- Oth. Ref. Type (dropdown menu)
- ID (text box)
- Sec Name (text box)
- Street (text box)
- Locality (text box)
- Postcode (text box)

Buttons: Complex Find, Next >, Cancel, Save

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.

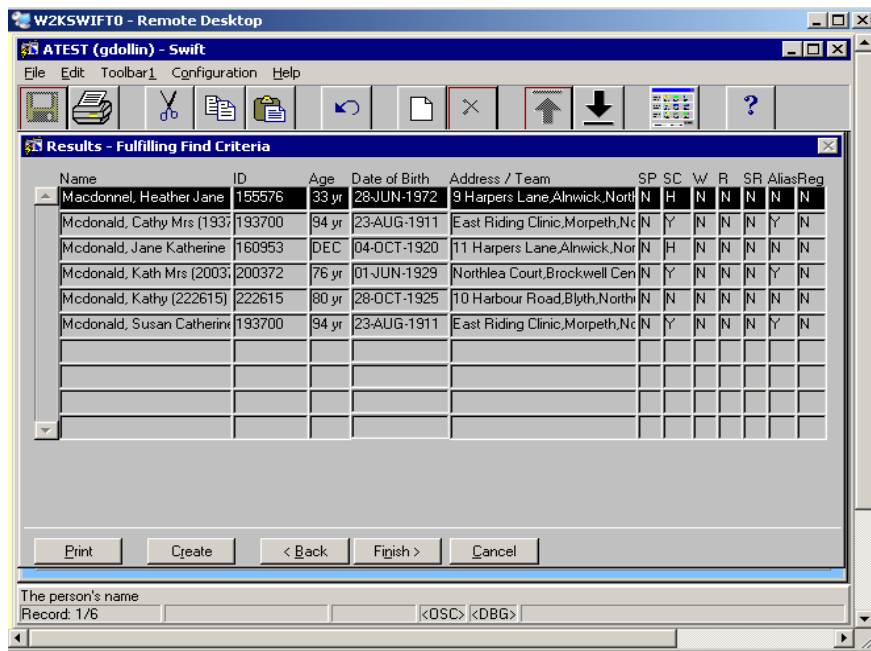
- To clear all fields press **SHIFT** and **F4**.



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.

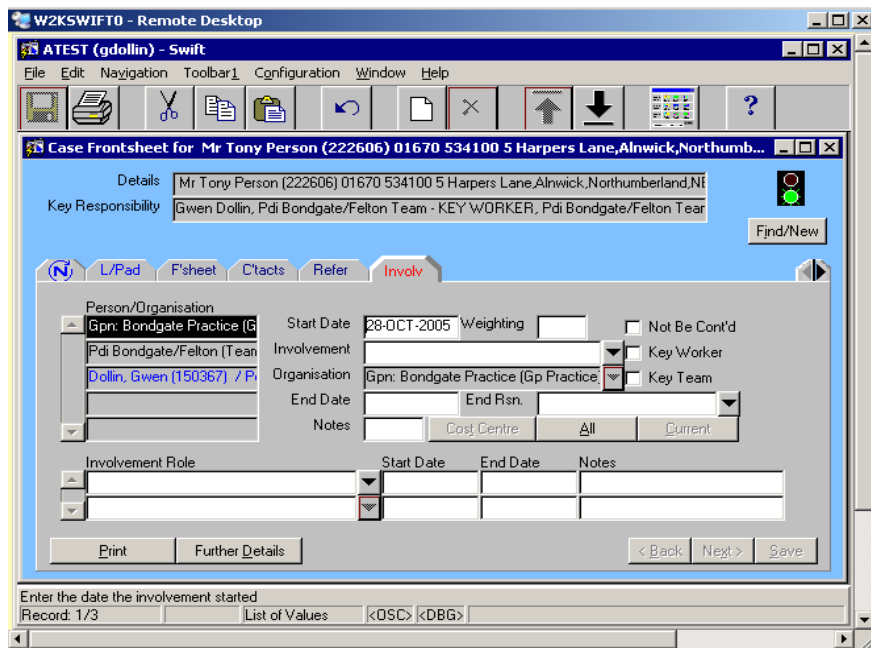
- Once you have entered the search criteria click on **Next >**.

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




- Click on the person's name in the list to select them and click on .
- Click on  (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 .
- Complete the following fields:

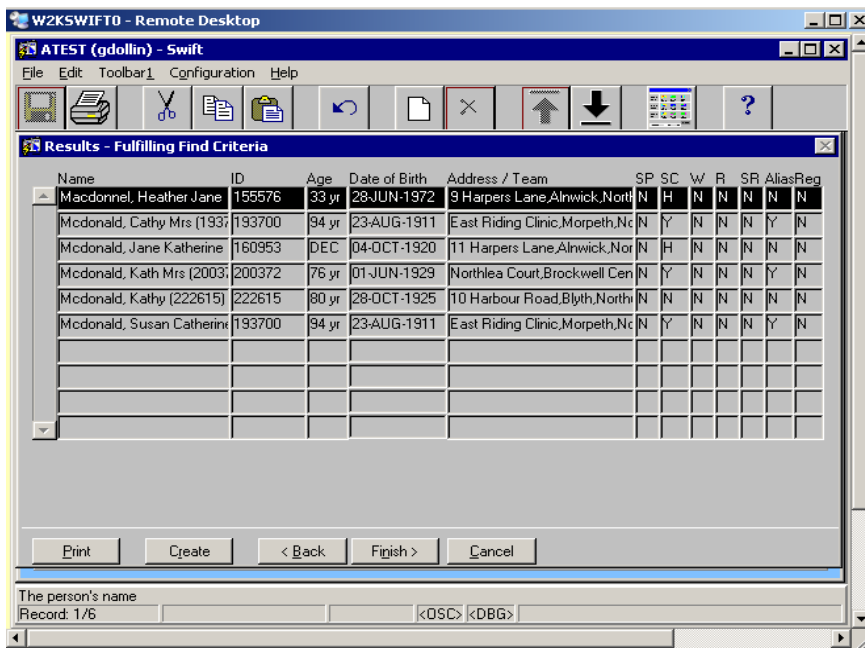
Start Date

Enter the date the involvement started.

Involvement

Complete this field by typing the surname of the person you are recording in to this field and pressing the tab key on your keyboard.

The Person Search Results screen will appear:



Note: if you cannot find the professional person who you wish to record on Swift, contact the Systems Support Help Line on 01670 622 450

- Click on the person's name in the list to select them and click on . The name of the person will now be displayed in the Involvement field.

- Click on .

Involvement Role

Enter the relevant involvement role:

- Click on ▼
- Click on the relevant role in the list, i.e. Support Planner.
- Click on .

Start Date

Enter the date the involvement started.

- Click on .