

# Systems Support

## Swift Training



## Swift Reports and Forms

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Northumbria Healthcare   
NHS Foundation Trust

*In partnership  
with*

**NORTHUMBERLAND**  
COUNTY COUNCIL



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## ABOUT SWIFT REPORTS AND FORMS

- A report is a document that only displays information that has already been recorded in Swift. A form also displays Swift information but you are able to record additional detail about the client within the form.

### Reports

- There are a number of reports on Swift which are available to be viewed or printed.
- Depending on the type of report you select, the information may be about one person or may be a collection of information about different people. For example, you may produce the Case Frontsheet which shows the basic details for the person that you are about to review; or you may obtain a list of all the people you have allocated to you by producing your own Caseload List.

### Forms


- Forms, including letters, are now used frequently throughout the care management process and self directed support and it is therefore likely that the majority of clients will now have one or more form produced via Swift. The current forms are set up as follows:
  - ◇ Forms which give the option to copy from a previously saved form, for example, CP1, SDS1 and Support Plan.
  - ◇ Forms which do not have the option to copy from a previously saved form, for example Personal Budget Offer letters.
  - ◇ Forms which can be amended and printed but are not saved in Swift.
- Some forms are pre-populated with information already recorded in Swift. If any information pre-populated by Swift is incorrect, out of date or incomplete, then Swift must be updated for the correct information to appear on the form.
- Some forms can be saved as a draft as many times as necessary and then saved as a final version. Once this is done it means that no changes can be made to that particular version of the form. If the client's basic details are updated after the form is saved as a final version, the finalised form will still show the client details as they were at the point of finalising it.

*Note: you will only be able to access reports and forms that are relevant to your role/group and should refer to your operational guidance for more information about what to record in them.*

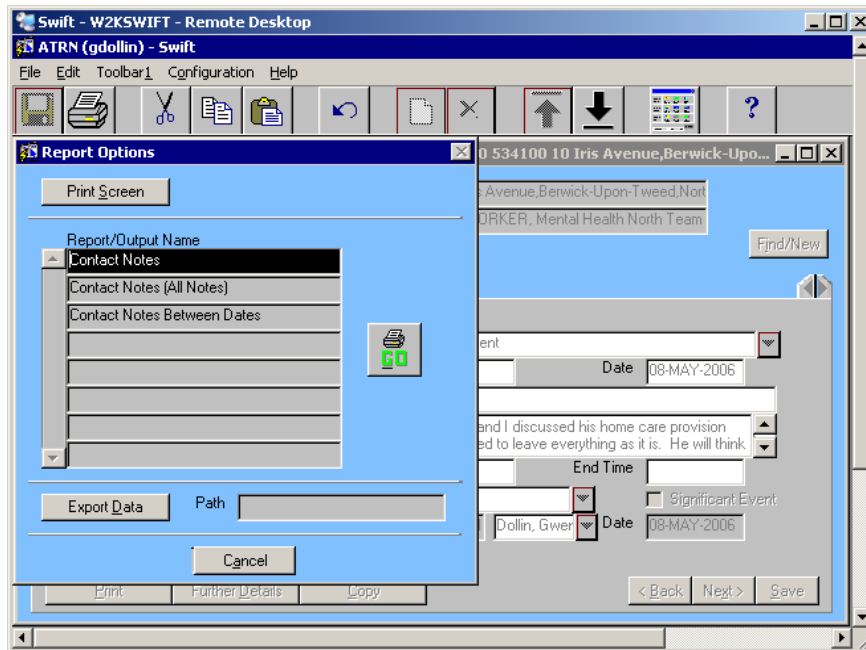
## RETRIEVING A REPORT


- Access the screen where the report is available and find the relevant person e.g. to retrieve a Contact Note report, move to Contact Notes screen and find the client. Refer to the relevant section of this manual. You may find it useful to refer to *Appendix 1* of this manual for a list of reports and the screens where they are available on Swift.

## Swift - Swift Reports and Forms - Retrieving a Report

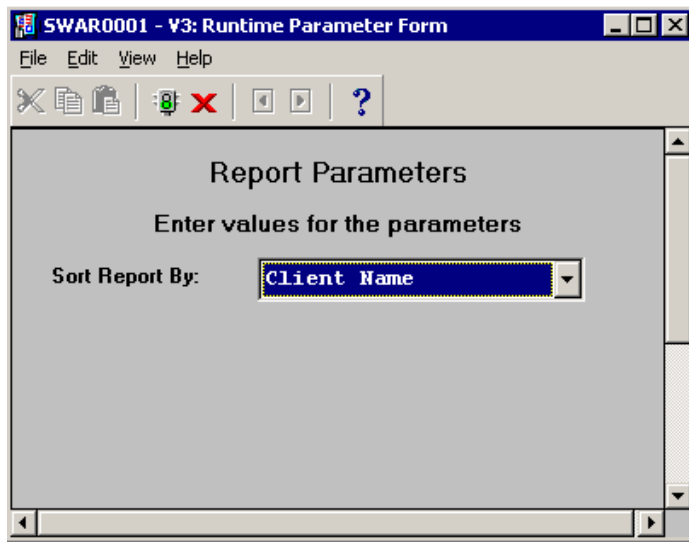
- If you are retrieving a single contact note, click on the contact note that you require in the Note Date/Type summary list.
- Click on .


The Report Options screen will be displayed with a list of the reports available from this Swift screen:








- Click on the report you require in the Report/Output Name summary list.
- Click on  (The Swift report will display on screen, though the report may take a few seconds to appear on your screen).
- For some reports, there is a facility set up for filtering or sorting the information. If this is the case, a Reports Parameters screen will display at this point, with fields for you to specify the information you require or the order in which you would like it presented. For example, you can specify dates you require on the Contact Notes Between Dates report and you can sort the Caseload List report by Client Name, Involvement Start Date or Review Due Date. Refer to the relevant section of this manual for further information. This is an example of the Reports Parameters screen:





- If this screen displays you need to set your preferences then click on  (Run Report) at the top of the screen or press your Enter key.
- Some reports have the following toolbar that appears at the bottom of the report:






- ◇  These buttons allow you to move through the report.
- ◇  You can enter the number of the page you wish to view in the first box.
- ◇  You can decrease/increase the report display size.
- ◇  This button allows a copy of the report can be saved outside of Swift as a PDF file.
- ◇  This button will allow the report to be printed and will bring up a Print Options window.

## PRINTING A REPORT



- If the report you have generated has the following toolbar along the bottom of the report, the printer icon on this toolbar can be used to print the report:



- On clicking on  the Print Options window will appear any you will be able to select your print options.

- Your report may not have a toolbar along the bottom of the screen, but may have the following menu options along the top of the report which should allow you to print:
  -  or 
  - **File** and **Print...**
  - **File** and **Print and close**

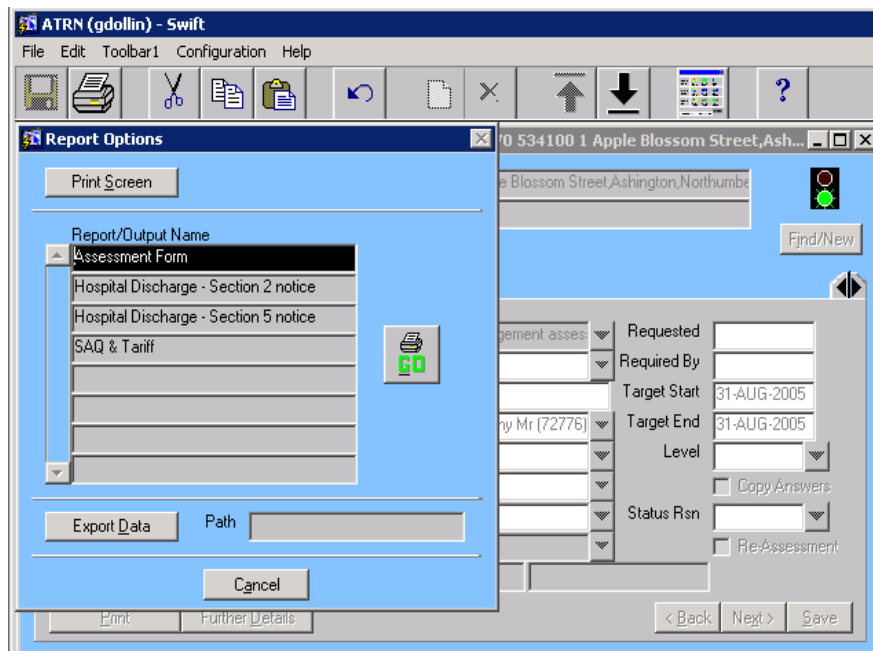
## CLOSING A REPORT

- To close the report down you need to use one of the following options, depending on the type of report that you have selected:
  - Click on  (Close Previewer).
  - Click on  (Close and return to Swift).
  - Click on **File** and then click on **Close**, **Print and close** or **Close without printing**.
- Click on **Cancel** to close down the Report Options window and return to the Swift screen.

## GENERATING A FORM


- Access the screen where the form is to be generated and find the relevant person e.g. to generate a CP1, move to either the Assessments or Reviews screen and find the client. You may find it useful to refer to *Appendix 2* of this manual which lists the current forms and the screens where they are available on Swift. Please also refer to the relevant Swift manual where you will find additional guidance on how to record these events.
- Record the relevant event and then click on this event in the summary list, e.g. Specialist Assessment
- Click on **Print**.

*The Report Options screen will be displayed with a list of the forms available from this Swift screen:*

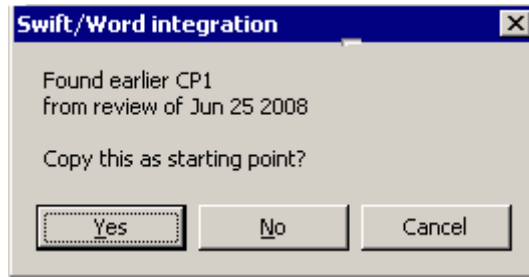


- Click on the form you require in the Report/Output Name summary list.



- Click on  (The form will display on screen, though it may take a few seconds to appear on your screen).
- If you are generating a form which gives the option to copy from a previously saved form, Swift will find the latest form and give you the option to copy the information and use it as a starting point for your new form.

A message similar to the following example will appear:



- Click on  if you wish to copy information from this form,  if you want to create a form and don't wish to copy information from the previous form or  to return to Swift without creating a form.



***You must check the information that has been copied from a previous form to ensure that it is still relevant.***

- If there is not a previously saved form or you have chosen not to copy from an earlier form, a new form will be displayed on your screen.
- Depending on the type of form, it may already be populated with information recorded on Swift for the client.
- If any information pre populated by Swift is incorrect, you cannot update this on the form. You must close and, if relevant, save it as a draft, return to Swift to update the information and then retrieve it again. Refer to *Closing and Saving Forms* section of this manual.
- If there is already a draft form linked to the event you have selected, this draft will appear on your screen. It may already be populated with information recorded on Swift for this client together with details that were previously recorded on the draft and will be ready for you to update.

## COMPLETING FORMS

### Recording Details on Forms

- There are different types of field on forms where information is displayed or entered. A form could contain one or more of the following types of field:
  - ◇ Fields populated by Swift – these cannot be updated on the form. You will need to update Swift and then retrieve the form to see the changes.
  - ◇ Check Boxes – click in the box to add a tick or a cross, click in the box again if you want to remove the tick or cross.
  - ◇ Form fill in fields – these are the ones that are shaded grey where you enter information, for example:

Occupation	<input type="text"/>
------------	----------------------

- ◇ Drop down boxes – these are grey boxes containing words such as  or . Click on the box to display the list to choose an answer.

- ◇ Text fields – these are free text fields which are not shaded, where you can enter an unlimited amount of information below the bold text within the field, for example:

Physical Health i.e. Diabetes, Vaccinations

- ◇ Buttons – you can either click or double-click on the button to automatically insert pre-set text within a form or to perform a calculation within a form. Examples of this are **Update Calculations** in the SDS1 form and **Go** in the Personal Budget Offer Letter.
- ◇ Round Tripped fields – These are fields that have been set up to automatically populate with the latest saved information from the relevant form, for example between the CP1 and Budget Approval Request form.

## Moving Around Forms

- To move around client forms you can use your mouse, your cursor keys and, in some places, your Tab key.
- If you choose to use your mouse click with your mouse in the appropriate text field before typing and always check that the text displays correctly before finalising your form.
- If you choose to use the downward arrow key on the keyboard you must ensure that your cursor appears in the area you want text to appear again checking that text displays correctly before finalising your form.
- Avoid using the tab key in text fields as some forms are set up in table format and using the tab key may insert an additional row in to the table which you would want to avoid.
- You can use Edit, Undo if you have made an error.
- Remember that it is very important to regularly “save” when completing forms - see *Closing and Saving Forms - Regularly Saving a Form* section of this manual.

## Formatting Text

- Information entered into Text fields can be formatted using the Word formatting options such as bold, italic and underline and also bullets and numbering.
- The Word formatting options will appear on the Word toolbar and can also be accessed via the Format menu.

*Note:* you cannot format text entered in Form fill in fields.

## Spell Checking Text

- You can use the Word spell check facility within certain forms, e.g. CP1, however it will only spell check information entered into the Text fields. Any Form fill in fields (the ones with grey shading) or fields populated by Swift will not be spell checked. There is no spell check button to use on the toolbar, therefore to start the spell check:
- Ensure your cursor is in the first Text box field where information has been recorded.

- Click on the Tools menu and select Spelling and Grammar.

*Note: if you start the spell checker with the cursor further down the document, the Text fields prior to that will not be checked.*

## Copying and Pasting Text in to Text Fields

- Information can be copied and pasted in to text fields using the Word facility e.g. Copy and Paste icons on the tool bar, keyboard keys CTRL and C (to copy) and CTRL and V (to paste) or via the Edit menu.

## CLOSING AND SAVING FORMS

### Regularly Saving a Form

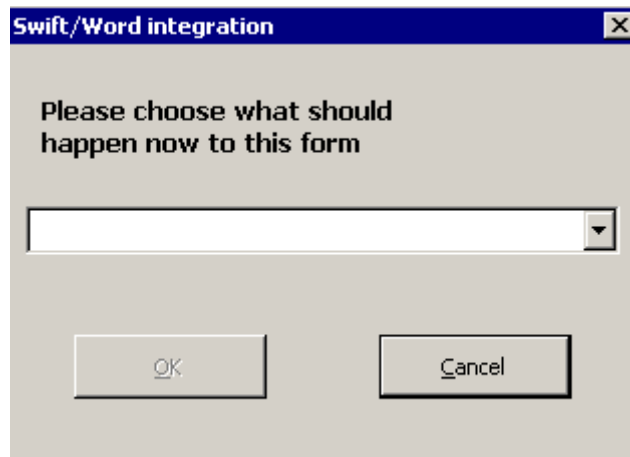
- As with any Word document, it is advisable to regularly save the form so that if there is a problem with your PC, the network or Swift you will not lose the information you have recorded.
- Click on .
- Click on .

*Note: saving the form in this way will save it as a draft version but will leave it open on your screen.*

### Saving the Form as a Draft

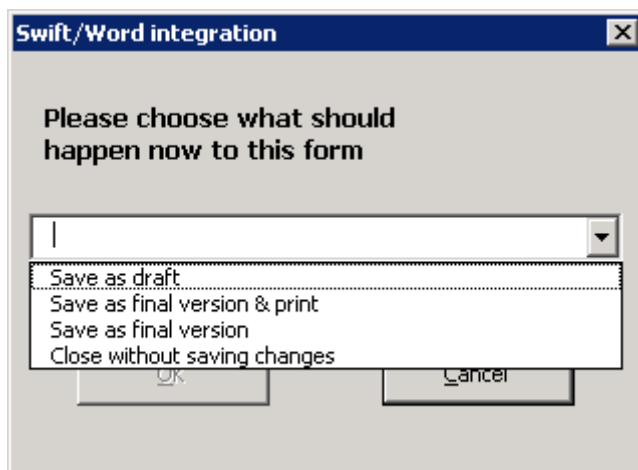
- You can save the form as a draft which will allow you to save the information you have entered so far and close it. The form can then be retrieved at a later time and will still display information you have previously entered.
- Click on .
- Click on .

*The following screen will be displayed:*



- Click on the drop down box.

The following options will be displayed:

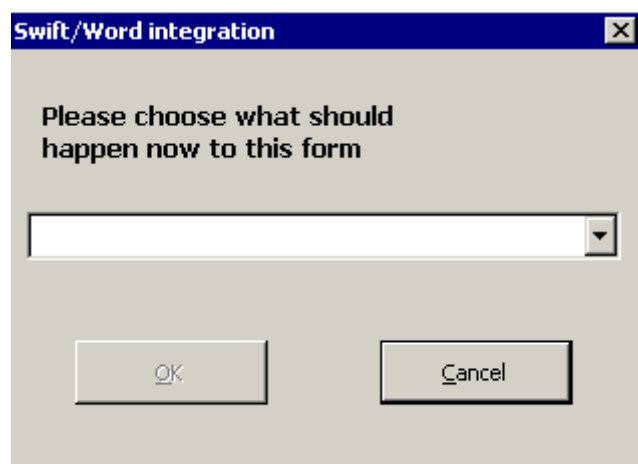


- Click on **Save as draft**.
- Click on **OK**.
- The form will close, Word will be minimised at the bottom left of your screen and you will be returned to the Report Options screen.
- Click on **Cancel** to close the Report Options screen.

### Saving the Form as a Final Version

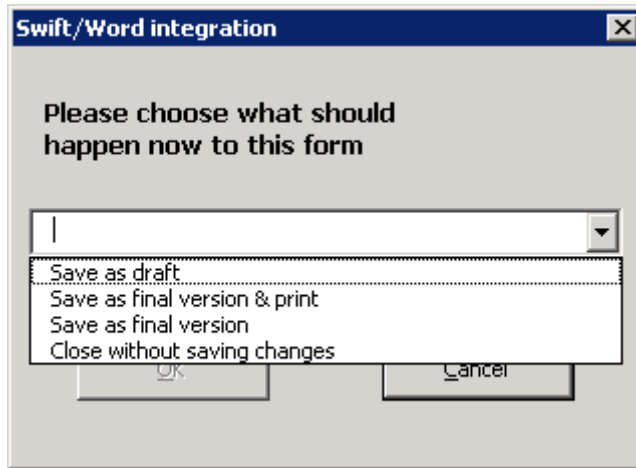
- Once a form is saved as a final version it cannot be amended, therefore you must be sure that you will not want to make any further changes to it before you save as a final version.
- Click on **File**.
- Click on **Close**.

The following screen will be displayed:



- Click on the drop down box.

The following options will be displayed:



- Select appropriate option to finalise the form.
- Click on .

The following screen will be displayed to let you know that the relevant emails have been prepared:



- Click on .
- The form will close, Word will be minimised at the bottom left of your screen and you will be returned to the Report Options screen.
- Click on  to close the Report Options screen.
- Retrieve and send the emails. Refer to *Emailing Forms* section of this manual.



**Now that you have saved a form as a final version and the relevant emails have been prepared you must retrieve and either send or delete them as necessary.**

## Closing the Client Form without Saving Changes

- If you have recorded information on the form but do not wish to save the information you have entered, you can use this option to close it without saving the information you have entered.
- Click on .
- Click on .
- Click on the drop down box.



The following screen will be displayed:

Section 1	
Surname	Armstrong
Formal Name (if different to Surname)	
Title	Mrs
Address	10 Bothal Cott
Telephone Numbers	815906 (H)
Gender	Female
NHS Number	4249812235
Occupation	Retired Schoolteacher
Religion	Church of England
Ethnicity	White - British
Spoken Language	

Contact/Relative/Carer Information  
[No information recorded]

- Click on **Close without saving changes**.
- Click on **OK**.
- The form will close, Word will be minimised at the bottom left of your screen and you will be returned to the Report Options screen.
- Click on **Cancel** to close the Report Options screen.

*Note: if the reason you are closing the form without saving changes is because you do not want a form for this client, you must ring the Systems Support Help Line who will delete the file that has been automatically created in the relevant folder on the network.*

## EMAILING FORMS

### Emailing Copies of the Form

- Once the form has been saved as a final version, Swift will automatically generate emails. The emails that are generated will be dependant on the type of form you have finalised.

*Note: Swift can only generate the emails once the form has been saved as a final version.*

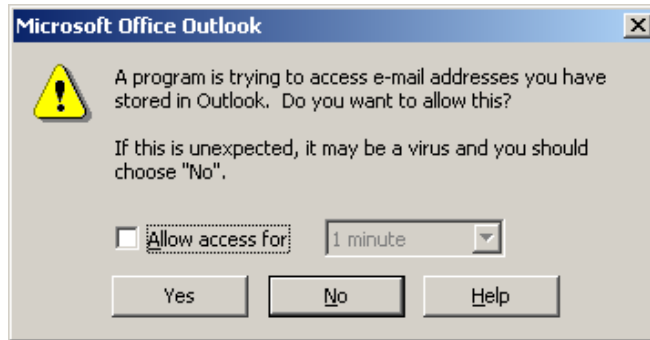
- Go to your desktop.



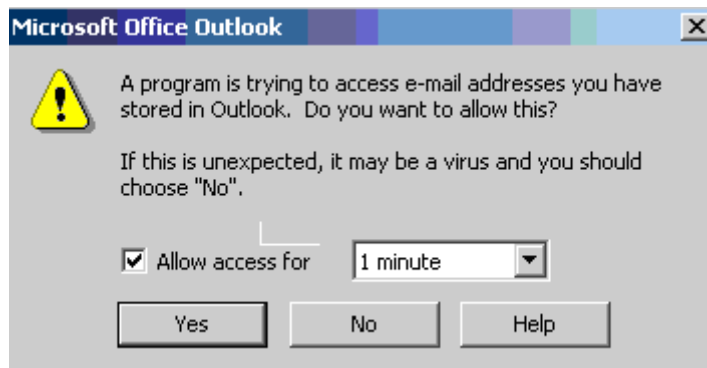
- Double click on the **SendSwiftForm** icon.


*Note: if an error message is displayed at this point, you may need to open Outlook. It is very much dependent upon the set up of your PC as to whether you need Outlook open or not.*

The following message will appear:



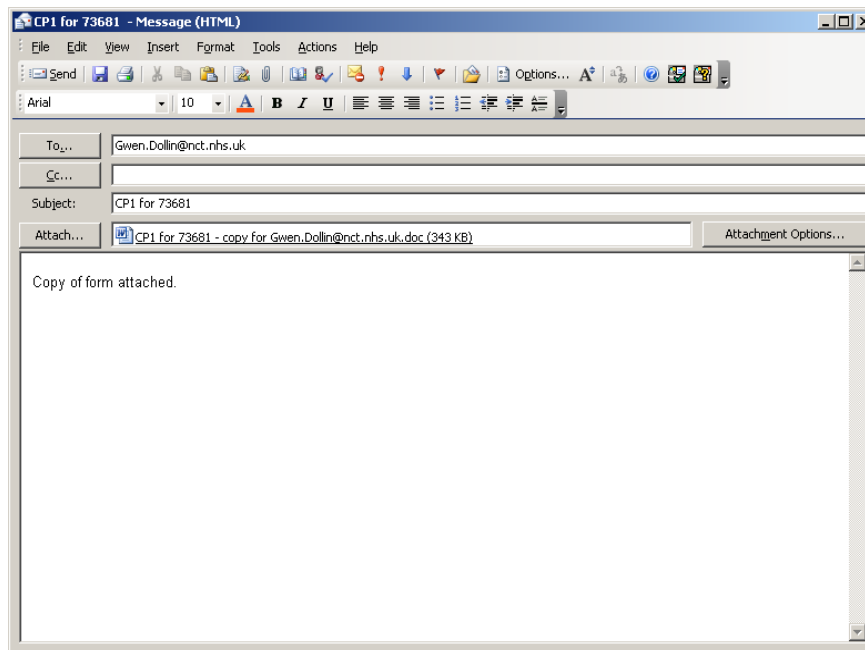
- Click on  Allow access for to insert a tick.



- Click on  Yes
- The relevant emails will be generated.
- If the person's email address has automatically appeared in the email To box, the name of the attachment will include the email address of the person it is being sent to.


**!** *You must check that you wish to send the email to the recipient. Although Swift will generate the emails, there may be instances where you do not want to send the email. Refer to [Emailing Forms, Closing Emails Without Sending Them](#) section of this manual.*

The following screen shows an example of the emails which will be generated:

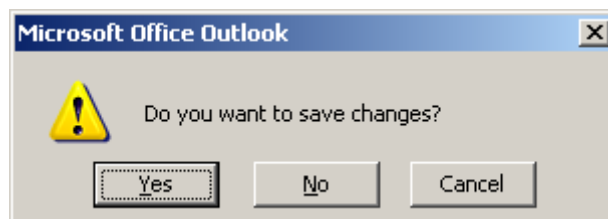


- You will now be able to send the emails. Some emails will already have the recipients email address entered, others may require you to enter the email address.
- Any emails you send will appear in your Outlook Sent Items folder.

### Closing Emails without Sending Them

- If you do not wish to send an email:
- Click on  (Close) at the top right of the email.


The following message will be displayed:



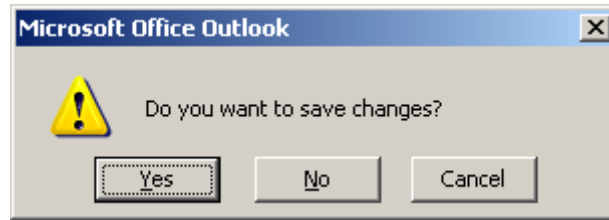
- Click on .

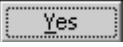
*Note:* if you close an email but then realise that you do need to send it you can generate another email with an attached form. Refer to Sending Additional Emails section of this manual.

### Saving the Emails to Send at a Later Time

- There may be instances where you wish to send the emails, however you want to send one of the emails at a later time. There is a way for you to hold this email in your Outlook Drafts folder until you are ready to send it. To do this:
- Click on  (Close) at the top right of the email.

The following message will be displayed:



- Click on .
- The email will be stored in your Outlook Drafts folder.

## RETRIEVING SAVED FORMS


### Retrieving a Form Saved as a Draft

- If you wish to make further amendments to a form you have saved as draft you can retrieve the form as follows:
- Go to the relevant Swift screen, e.g. Assessments.
- Click on the relevant event, e.g. SAQ & Tariff.

*Note* you must ensure that you select the event where you saved the draft form.


- Click on .
- Select the relevant form.





- Click on .
- The form will appear and you will be able to edit the form.

### Viewing a Final Form

- If you wish to view a finalised form you can retrieve the form as follows:
- Go to the relevant Swift screen, e.g. Assessments.
- Click on the relevant event, e.g. SAQ & Tariff.

- Click on .
- Select the relevant form.

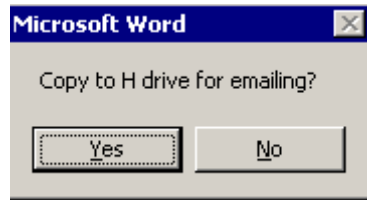


- Click on .
- The form will appear, but as it has been saved as a final version, it is protected and cannot be altered.
- Click on .

*Note:* the Save option no longer displays on this menu as you will not be able to make any changes to a form saved as a final version.

- Select .

The following screen will be displayed:



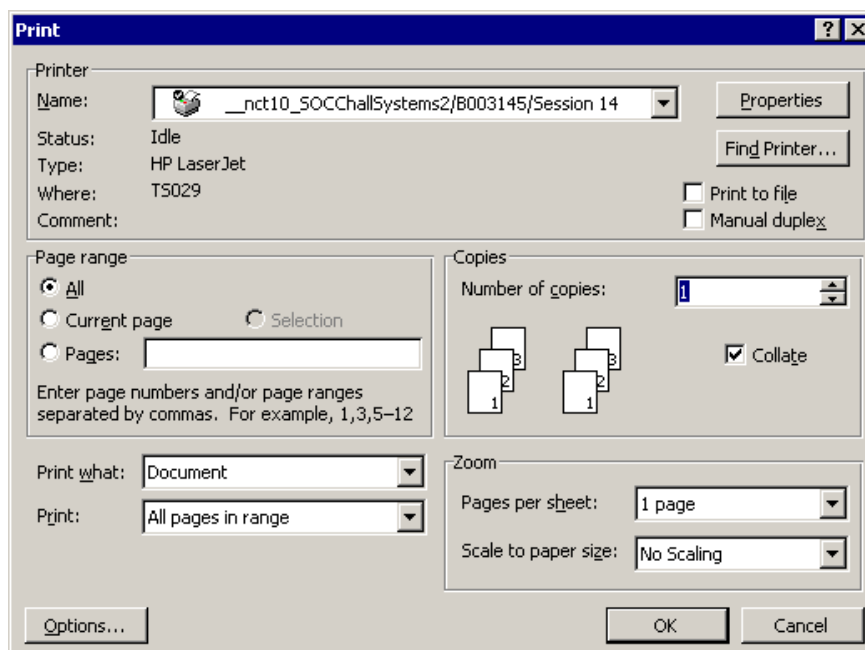
- If you do not wish to create an email, click on No to Sending Additional Emails
- If you need to send an additional email, display and then close the final form. Refer to *Retrieving Saved Forms*, *Viewing a Final Form* section of this manual.
- Click on  to the message *Copy to H Drive for emailing*, minimise Swift and generate the email. Refer to *Emailing Forms - Emailing Copies of the Form* section of this manual.

*Note:* one email will be generated with the form attached however at this stage it will not automatically enter the recipient email addresses. You will need to enter these manually before sending them.

## PRINTING A FORM

- Retrieve the relevant form and have it displayed on your screen.
- Click on .
- Click on .

The following screen will be displayed:



- You now have the option to print all of the form, the current page, page range or you can highlight and select the sections you wish to print.

## **AMENDING A FORM SAVED AS A FINAL VERSION**

- If you require an amendment to a form that has been saved as a final version please contact the Systems Support Help Line for assistance.

## **DELETING FORMS**

- Certain forms are automatically saved on the network. If you have generated the form in error and do not wish to have it stored on the network you must ring the Systems Support Help Line who will delete the file on your behalf.

# APPENDIX 1

## Reports

Name:	What the Report Shows:	Where you can access it:
<b>Case Frontsheet</b>	A summary of basic information held on Swift about a client, including relative/carer and referral information.	<ul style="list-style-type: none"> <li>• Frontsheet, Contacts, Referrals and Involvements screens in Frontdesk module. Contact Notes.</li> </ul>
<b>Caseload List Report</b>	Caseload list which you can sort by: <ul style="list-style-type: none"> <li>• <b>Client name</b> (in alphabetical order by client name).</li> <li>• <b>Review Due date</b> (with the earliest review dates first).</li> <li>• <b>Involvement start date</b> (with the oldest involvement start date first).</li> </ul>	<ul style="list-style-type: none"> <li>• Frontsheet screen in Front Desk module.</li> </ul>
<b>Caseload List by Key Worker (Team List)</b>	Full team's caseload sorted in alphabetical order by Key Worker and then by review date (for Team Managers and Admin only).	<ul style="list-style-type: none"> <li>• Frontsheet screen in Frontdesk module.</li> </ul>
<b>Catalogue Bundle</b>	A list of all Swift Forms such as CSP1's, Option Guidance, OT Assessments, SSIR's for a particular client.	<ul style="list-style-type: none"> <li>• Frontsheet screen in Frontdesk module.</li> </ul>
<b>Checksheet for Review</b>	A summary of some of the basic details held on Swift about the person.	<ul style="list-style-type: none"> <li>• Frontsheet and Involvements screen in Frontdesk module.</li> </ul>
<b>Client Information from RiO</b>	Key information from RiO (NTW's patient information system) from the nightly Swift/RiO exchange.	<ul style="list-style-type: none"> <li>• Contact Notes module and Workflow screen.</li> </ul>
<b>Contact Notes</b>	One contact note which you have selected from the client's list of contact notes.	<ul style="list-style-type: none"> <li>• Contact Notes module.</li> </ul>
<b>Contact Notes (All)</b>	All contact notes for the client.	<ul style="list-style-type: none"> <li>• Contact Notes module.</li> </ul>

## Swift - Swift Reports and Forms - Appendix 1

<b>Notes)</b>		
<b>Contact Notes Between Dates</b>	Contact notes between the dates that you specify.	<ul style="list-style-type: none"> <li>• Contact Notes module.</li> </ul>
<b>SLT Contact Notes Between Dates</b>	Contact notes recorded by Speech and Language Therapists between the dates that you specify.	<ul style="list-style-type: none"> <li>• Contact Notes module.</li> </ul>
<b>STSS Contact Note History</b>	STSS related contact notes between the dates that you specify.	<ul style="list-style-type: none"> <li>• Contact Notes module.</li> </ul>
<b>Contact Notes WF</b>	The contact note triggered by the Check Contact Notes workflow job or the Significant Event workflow job.	<ul style="list-style-type: none"> <li>• Workflow screens.</li> </ul>
<b>CSP1 Status</b>	Provides a list of eligible clients, along with the detail of whether a CSP1 is present (finalised or in draft) or whether there is still a CP1 (and they are yet to be reviewed).	<ul style="list-style-type: none"> <li>• From the Frontdesk module of Swift, search for your own Swift record. Admin will need to search for any worker within team they want to run the list for.</li> <li>• The report may take a few minutes to display.</li> <li>• You can either save this to your normal place on the network or print it off.</li> </ul>
<b>Home Care/Short Break Care Charges</b>	Letter sent to client regarding the outcome of their financial assessment.	<ul style="list-style-type: none"> <li>• Frontsheet, Contacts, Referrals and Involvements screens in Frontdesk module. (Note: when the report is displayed you should click on View Letter).</li> </ul>
<b>Hospital Discharge - Section 2 Notice</b>	Notice under Section 2 of the Community Care (Delayed Discharges) Act 2003 for a client.	<ul style="list-style-type: none"> <li>• Assessment screen in Assessments and Reviews module.</li> </ul>
<b>Most Recent CP1</b>	The most recent finalised CP1.	<ul style="list-style-type: none"> <li>• Frontsheet, Contacts, Referrals and Involvements screens in Frontdesk module.</li> </ul>
<b>Most Recent SDS1</b>	The most recent finalised SDS1.	<ul style="list-style-type: none"> <li>• Frontsheet, Contacts, Referrals and</li> </ul>



		Involvements screens in Frontdesk module.
<b>Service Diary</b>	A diary sheet of the client's current scheduled services (e.g. home care, day care and meals on wheels).	<ul style="list-style-type: none"><li>• Frontsheet screen in Frontdesk module.</li><li>• Provisions screen in CPC module.</li></ul>

## APPENDIX 2

### Forms

Name:	What the Form Shows:	Where can you generate it:
CM1	Form used to record referral information.	<ul style="list-style-type: none"> <li>Generated in Frontdesk/ Contact screen.</li> </ul>
CSP1	Form used to record the details of a Client and Carers Needs Assessment.	<ul style="list-style-type: none"> <li>Generated against Client Needs Assessment in the Assessment and Reviews module:</li> <li>Generated against Client Needs Assessment Review type in the Assessment and Reviews module:</li> </ul>
CSP2	Form used to record the details of a Carer's Needs Assessment, Carer Needs Assessment Reviews and Updates.	<ul style="list-style-type: none"> <li>Generated against the Carer Needs Assessment type within the Carer's record.</li> </ul>
CSP4	Form used for recording where there are no changes to the client or carers needs at review.	<ul style="list-style-type: none"> <li>Generated against the Client Needs Assessment Review type in the Assessment and Review module.</li> </ul>
GP Letter	Letter to notify the referring GP that a client has been allocated and will have an assessment carried out shortly.	<ul style="list-style-type: none"> <li>Frontsheet, Contacts, Referrals and Involvements screens in Frontdesk module.</li> </ul>
Hazard Form	To record information regarding a Hazard or updates to an open Hazard.	<ul style="list-style-type: none"> <li>Generated against Hazard type of Hazard Form.</li> <li>Recorded within Frontsheet, further details, Hazard Tab.</li> </ul>
Individual Placement Agreement (IPA)	To be completed for placements into care homes.	<ul style="list-style-type: none"> <li>From an Individual Placement Agreement contact note in the</li> </ul>

		Contact Notes module.
<b>Options Guidance</b>	Form used by Early Intervention services to record exit from service.	<ul style="list-style-type: none"> <li>• From Contact Note type Options Guidance</li> </ul>
<b>OT Assessment</b>	Form used by OT's to record details of OT Assessments	<ul style="list-style-type: none"> <li>• Generated against the OT Assessment type.</li> </ul>
<b>Person Centred Planning Referrals Form (PCP)</b>	To be completed when a referral to PCP received.	<ul style="list-style-type: none"> <li>• From a Person Centred Planning Referral contact note in the Contact Notes module.</li> </ul>
<b>Safeguarding Episode Form (SSIR)</b>	To record information regarding a safeguarding referral or updates to a safeguarding referral.	<ul style="list-style-type: none"> <li>• From one of the following note types in the Contact Notes: <ul style="list-style-type: none"> <li>○ Safeguarding Referral</li> <li>○ Safeguarding Referral Form Update</li> <li>○ Safeguarding Manager Validation.</li> </ul> </li> </ul>
<b>Short Term Multidisciplinary Assessment (STSS1)</b>	Used by Short Term Support Service to detail initial assessment and any follow up review.	<ul style="list-style-type: none"> <li>• Generated from one of the following Assessment Types on the Assessment Screen of the Assessments and Reviews module: <ul style="list-style-type: none"> <li>○ Short Term Multidisciplinary Assessment</li> <li>○ Update to Short Term Multidisciplinary Assessment.</li> </ul> </li> </ul>