

Systems Support

Swift Training



Workflow

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Northumbria Healthcare 

NHS Foundation Trust

*In partnership
with*

NORTHUMBERLAND
COUNTY COUNCIL

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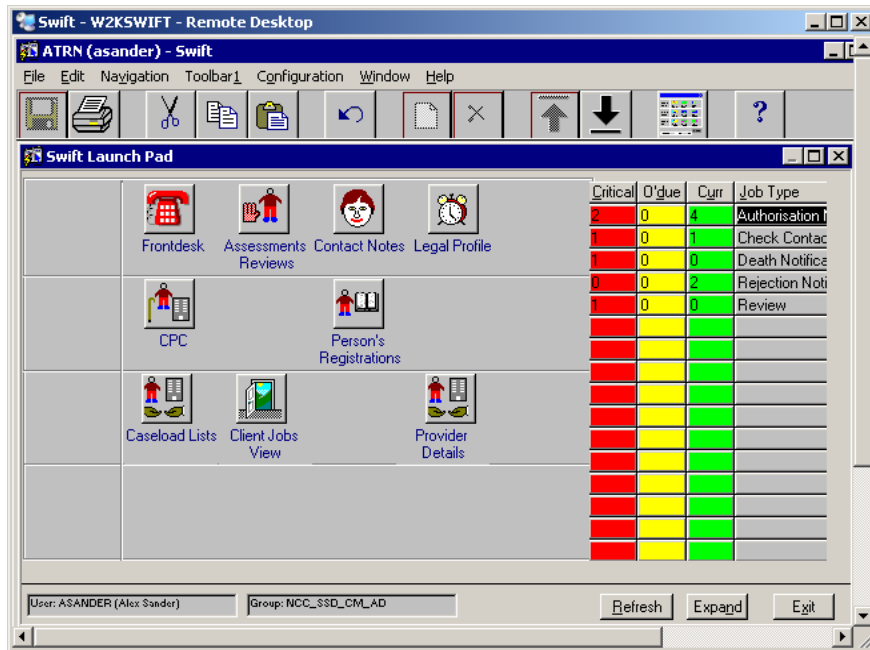
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ABOUT WORKFLOW

Workflow is a notification facility that produces workflow jobs that can be viewed via your Launch Pad. For example; workflow will send you an automatic reminder that you have a review to carry out, or a notification that someone has entered a contact note against a client that you are the key worker for.

WORKFLOW IN TRAY

When you log into Swift you will be able to see the Workflow In Tray on the right hand side of your Launch Pad. This 'in tray' will list all of the outstanding workflow jobs that are allocated to you.



Each workflow job has a 'currency' that changes as time progresses; from future, to current, to overdue and finally to critical. Future workflow jobs can only be viewed when in the workflow screens.

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

- To see the full description of each Job Type click on **Expand**.
- To return to the shorter description of each Job Type click on **Normal**.
- To update the workflow in tray with any jobs that have been allocated to you since logging on click on **Refresh**.

Workflow Job Types

The following table provides examples of different Job Types that you may receive depending on your role:-



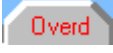

Job Type	Description
Care Managers:	
Review	Received by the key worker when a review is due.
Check Contact Notes	Received by the key worker when a contact note has been recorded by someone other than the key worker.

Authorisation Notification	Received by the key worker when a provision has been authorised by the team manager.
Rejection Notification	Received by the key worker when a provision has not been authorised (therefore rejected) by the team manager.
Team Managers	
Authorise a Provision	Received by the team manager when a new provision has been recorded in Costed Packages of Care.
Authorise a Provision Amendment	Received by the team manager when a provision has been amended in Costed Packages of Care.

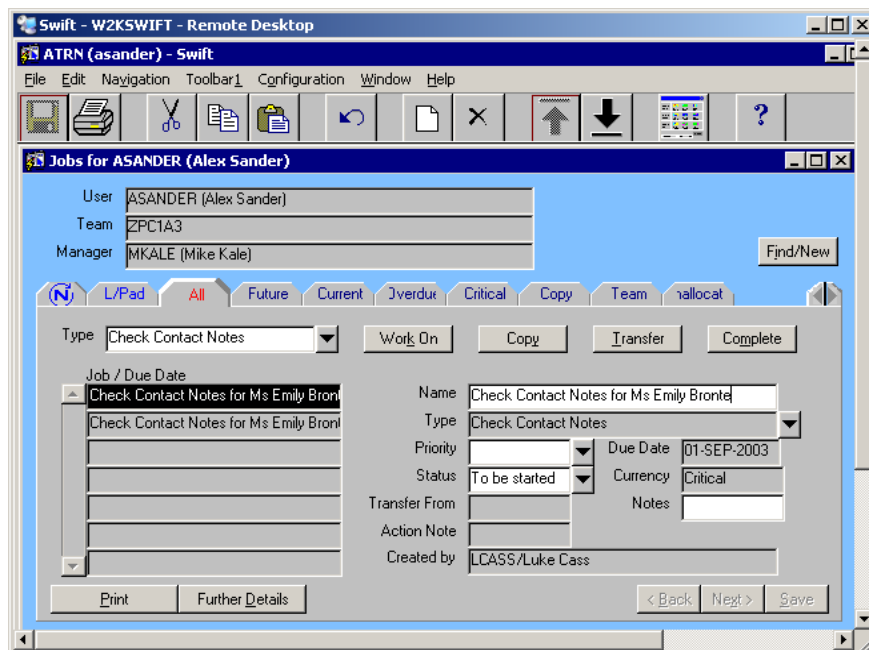
ACCESSING WORKFLOW SCREENS


To find out which clients the workflow jobs are linked to, click on any of the jobs listed and this will take you to the Workflow screens.

Depending on which line you click on, the relevant type of jobs will be displayed. Depending on which column you click on, the relevant workflow screen will be displayed:-

Click on the Job Type	The Workflow screens will be displayed and you will land on  .
Click on current (green)	The Workflow screens will be displayed and you will land on  (Current).
Click on overdue (yellow)	The Workflow screens will be displayed and you will land on  (Overdue).
Click on critical (red)	The Workflow screens will be displayed and you will land on  .

The following screen will be displayed:



The  screen allows you to view all jobs that are not yet current. They have a currency of Future.

Note: this screen can be used to see a list of future reviews.




allows you to view all jobs, regardless of the currency. Jobs are sorted in order of currency – critical, overdue, current and future in the Job/Due Date column.

The fields displayed are the same on the All, Future, Current, Overdue and Critical screens:

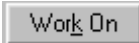
- **Type**
This will restrict the list of jobs to the type selected. Enter the job type you wish to display.
Note: if you select All this will display all jobs regardless of their type.
- **Job/Due Date**
This is a summary list of all the jobs for the selected type, the client they are attached to, and the Due Date. Click on a job in the summary list to see the details relating to that job.
- **Name**
This field details the job type and the name of the client it is associated with.
- **Job Type**
This is a view only field that shows the job type.
- **Due Date**
This is a view only field. This is the date by which the job should be completed and will automatically be created when the job is sent.
- **Status**
Enter the status of the job, i.e. To be started or In Progress. This field is optional.
- **Currency**
The currency of the job. This will either display; Future, Current, Overdue or Critical and is dependent on the job type and due date.
- **Transfer From**
If the job has been transferred to you from another colleague, their name will be displayed in this field.
- **Notes**
Enter any useful notes. (Only used by Finance).
- **Created By**
The name of the person from whom the job originates.

Actioning / Working On a Job

Most jobs require an action, such as a review to be carried out, or for you to read a contact note that someone has entered against one of your clients. Some jobs will allow you to access the relevant screen in Swift that holds the information, without having to search for the client.

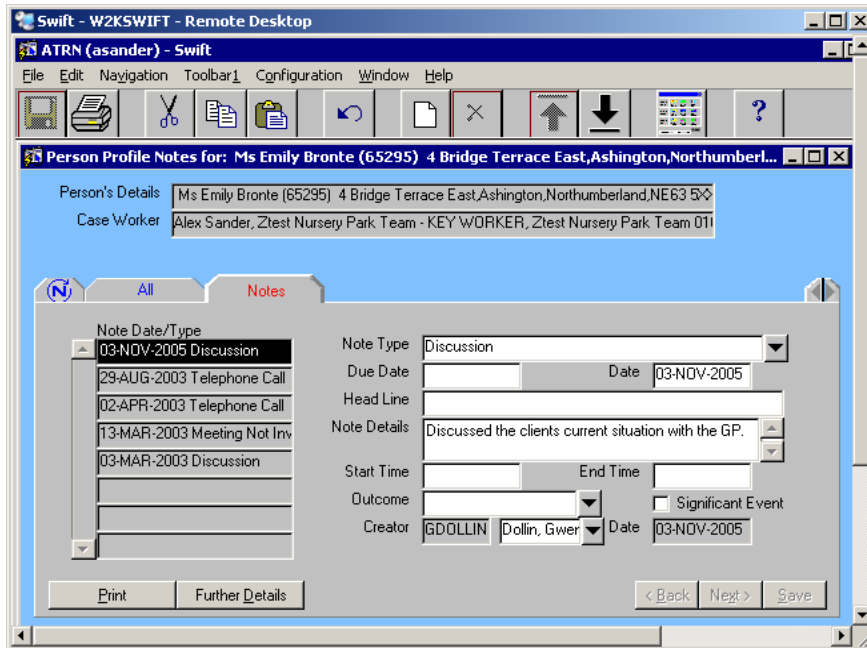
- Click on the job you wish to view or work on in the Job/Due Date summary list.
- Click on 

This will take you to the appropriate screen in Swift, depending on the job type you have selected. You can then view any necessary information or update Swift as required.

Example	If you have clicked on the “Check Contact Notes” job type on your workflow in tray, and then clicked on the job that you wish to view or work on in the Job/Due Date summary list of the workflow screens, you would then click on  .
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Swift - Workflow - Accessing Workflow Screens

The screen relating to the job you selected will be displayed:



- Click on **All** to return to the workflow screens. This screen will be labelled depending on the screen you came from in workflow; i.e. All, Overdue, Critical or Future.

Example

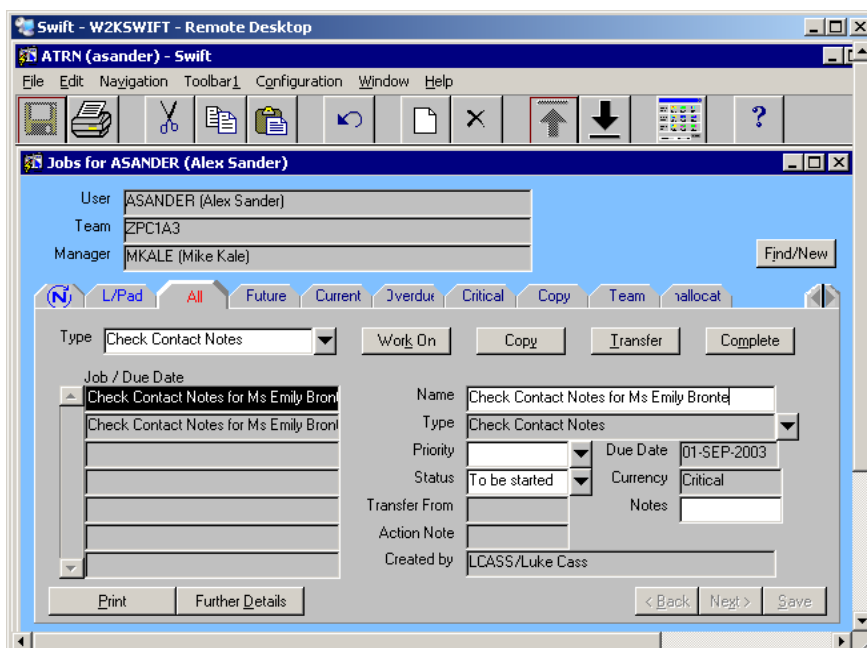
If you were on the **Overd** (Overdue) screen on the workflow screens, the screen used to return to workflow will be labelled **Overdue**.

Completing a Job

When you have finished working on a job, you must complete it, to remove it from your workflow in tray. For example; you may have read the contact note that someone has entered, or you may have carried out a review.

Note: some jobs will be completed automatically, for example, the Authorise a Provision and Authorise a Provision Amendment workflow jobs.

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



- Click on **Complete**.

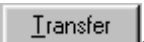
The following window will be displayed:

- Click on .

The job has now been removed/deleted from your workflow in tray.

Transferring a Job

You can transfer a job to another colleague in your team. If you are a manager you can transfer a job to a member of any team, or to another team.

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

The following window will be displayed:

- Complete the following fields:

Note: your user name automatically displays in the User field. This must be deleted before transferring the job.

User

Enter the user name of the person you wish to receive the job.

OR

Team

This field should only be used if you are a manager of a team. Select the cost centre of the team you wish to receive the job.

Note: if you are a team manager you have the option to transfer the job to another team. You must only transfer a job to another team if there is no key worker allocated. The job will then appear on the Unallocated screen of the team manager for that team.

Note: if you are a LFABO you have the option to transfer the job to another financial assessment team. Enter the team code of the team you wish to receive the job (e.g. NFA or CFA). The job will then appear on the Unallocated screen of the LFABO for that team.

- Click on .

The job has now been transferred and will no longer appear on your workflow in tray.

Deleting a Job

To delete a job refer to *Workflow – Completing a Job* section of this manual.

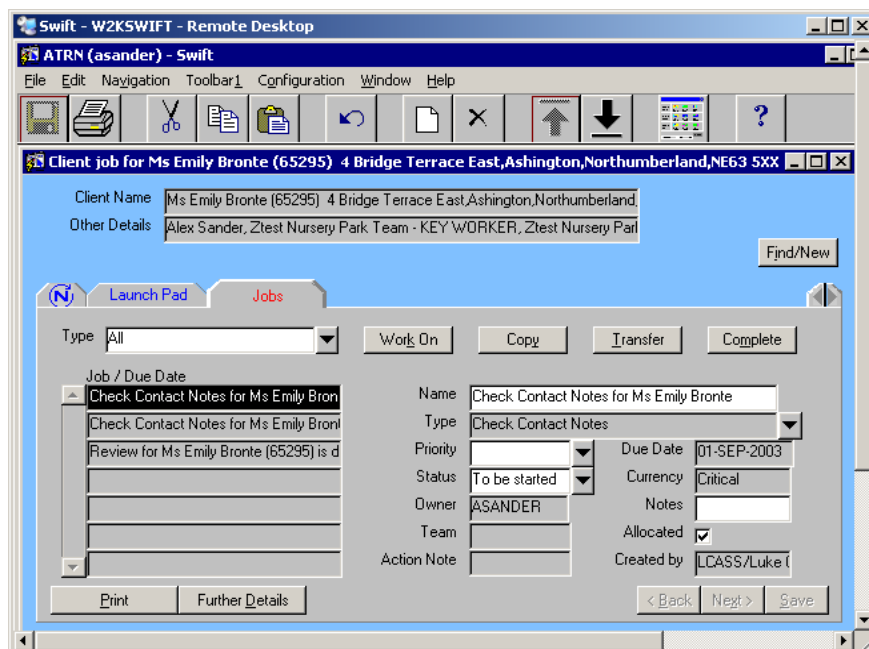
VIEWING A CLIENT'S WORKFLOW JOBS

It is possible to view all the outstanding workflow jobs that are linked to a particular client.



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

The following screen will be displayed:



The Jobs screen displayed looks very similar to the workflow screens.

The fields displayed are:

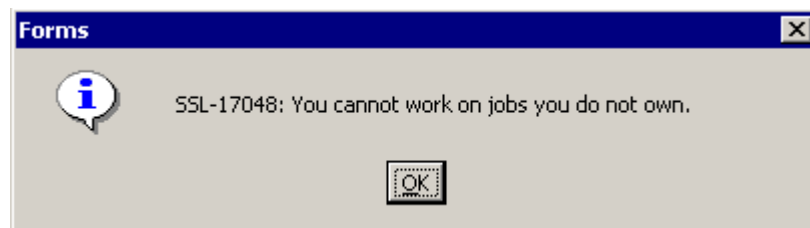
- **Type**
This will restrict the list of jobs to the type selected. Enter the job type you wish to display.
Note: if you select All this will display all jobs regardless of their type.
- **Job/Due Date**
This is the summary list of all the jobs for the selected type, the client they are attached to, and the Due Date. Click on a job in the summary list to see the details relating to that job.
- **Name**
This field details the job type and the name of the client it is associated with.
- **Job Type**
This is a view only field that shows the job type.
- **Due Date**
This is a view only field. This is the date by which the job should be completed and will automatically be created when the job is sent.
- **Status**
Enter the status of the job, i.e. To be started or In Progress. This field is optional.


- **Currency**
The currency of the job. This will either display; Future, Current, Overdue or Critical and is dependent on the job type and due date.
- **Owner**
The current owner of the job.
- **Notes**
Useful notes. (Only used by Finance).
- **Team**
The cost centre of the team the job belongs to.
- **Allocated**
A tick indicates that the job has been allocated to a worker.
- **Created By**
The name of the person from whom the job originates.

Actioning / Working On a Client's Job

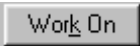
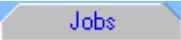
- Click on the job you wish to view or work on in the Job/Due Date summary list.

If you try and work on a job that does not belong to you, the following message will be displayed:




- Click on  to remove this message.
Note: you have to select a job that has your user name in the Owner field.

To work on a job that does belong to you:

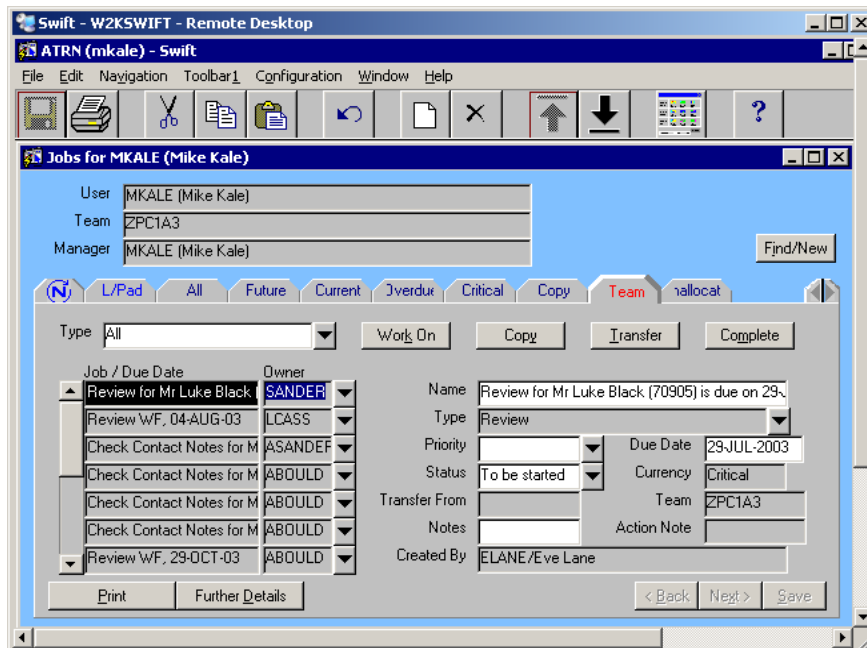
- Click on the job you wish to view or work on in the Job/Due Date summary list.
- Click on .
- This will take you to the appropriate screen in Swift, depending on the job type you have selected. You can then view any necessary information or update Swift as required.
- Click on  to return to the client's list of outstanding jobs.

Completing a Client's Job


Completing a client's job via the Client Jobs View module follows exactly the same process as completing a job in the workflow screens. Even though you are on a different screen, there is still a

 button. Refer to *Workflow – Completing a Job* section of this manual.


The following screen will be displayed:



This screen will display all the jobs that have been allocated to the members of your team.

The  screen gives you the ability to:

- ◇ Work on your team member's jobs.
- ◇ Transfer your team member's jobs.
- ◇ Transfer a job to a member of another team.
- ◇ Complete/Delete your team member's jobs.

The fields displayed on the  screen are:

- **Type**
This will restrict the list of jobs to the type selected. Enter the job type you wish to display.
Note: if you select All this will display all jobs regardless of their type.
- **Job/Due Date**
This is a summary list of all the jobs for the selected type, the client they are attached to, and the Due Date. Click on a job in the summary list to see the details relating to that job.
- **Name**
This field details the job type and the name of the client it is associated with.
- **Job Type**
This is a view only field that shows the job type.
- **Due Date**
This is the date by which the job should be completed and will automatically be created when the job is sent.
- **Status**
Enter the status of the job, i.e. To be started or In Progress. This field is optional.
- **Currency**
The currency of the job. This will either display; Future, Current, Overdue or Critical and is dependent on the job type and due date.
- **Transfer From**
If the job has been transferred from another colleague, their name will be displayed in this field.
- **Team**
The cost centre of the team the job belongs to.

- **Notes**
Enter any useful notes. (Only used by Finance).
- **Created By**
The name of the person from whom the job originates.

The , and buttons can be used as appropriate. Refer to either *Workflow – Actioning / Working On a Job*, *Workflow – Transferring a Job*, or *Workflow – Completing a Job* section of this manual.

Unallocated Workflow Jobs

If a workflow job has been transferred to your team, rather than to a named person, then it will appear on your Unallocated screen. Any workflow jobs appearing on your Unallocated screen will need to be allocated to a named person.

- On your Launch Pad click on Team View Job View (the Team View radio button).

If you have any unallocated workflow jobs you will see the name of Unallocated in the Team Member column.

- Click on the Team Member name Unallocated.

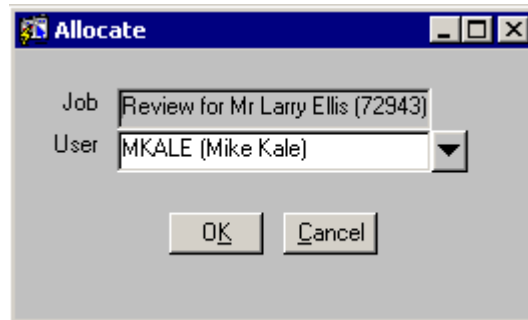
You will land directly on the screen within the workflow screens.

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

Note: you may wish to Work On this job and view who the key worker is. You will probably want to transfer the job to the current key worker.

- Click on .

The following window will be displayed:



The screenshot shows a dialog box titled "Allocate". It has two input fields: "Job" with the text "Review for Mr Larry Ellis (72943)" and "User" with a dropdown menu showing "MKALE (Mike Kale)". At the bottom, there are two buttons: "OK" and "Cancel".

- Complete the following field:

Note: your user name automatically displays in the User field. This must be deleted before allocating the job.

User

Enter the user name of the person you wish to receive the job.

- Click on .

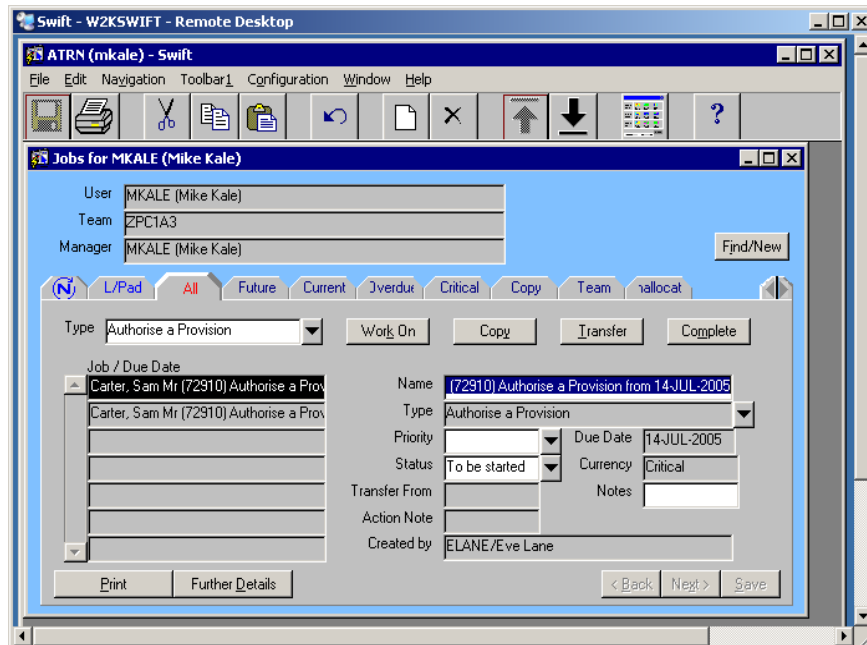
The job has now been allocated and will no longer appear on your Unallocated screen.

DEPUTISING

A deputy will be able to access any job sent to the person they are deputising for and carry out any actions on their behalf.

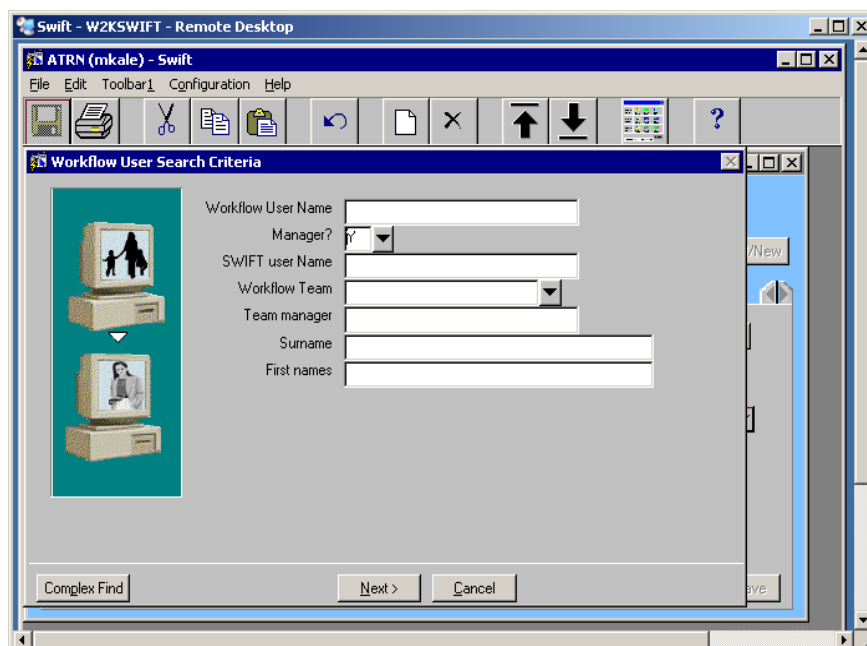
When accessing the workflow screens from the Launch Pad, the screen will default to display your own jobs.

The following screen will be displayed:



- To access and work on the jobs belonging to a person that you are deputising for click on **Find/New**

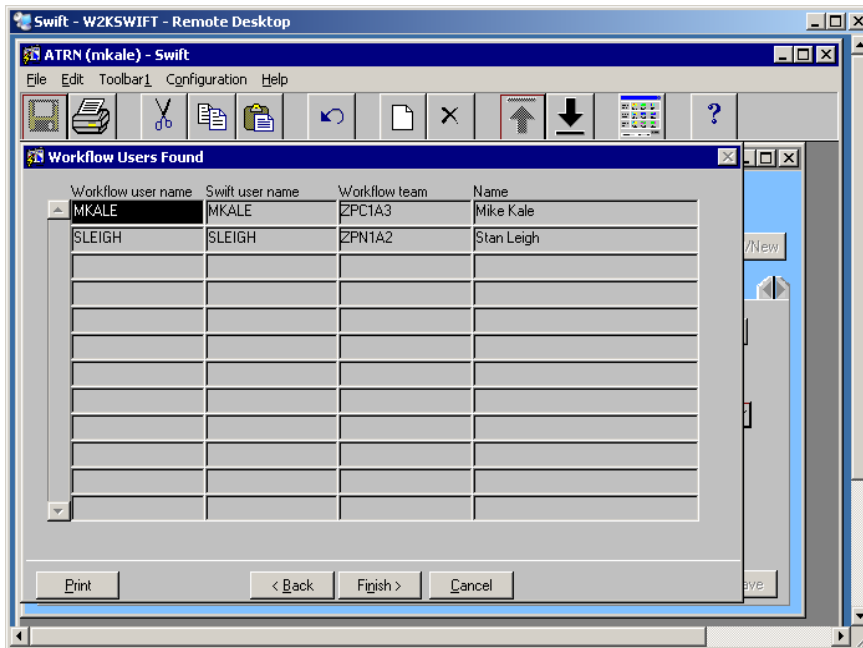
The following screen will be displayed:



- Search for the person whose jobs you need to access by entering either their User Name or Surname using wild cards if necessary.
Note: the format for usernames in Swift is usually first initial followed by surname.
- You can also use Workflow Team as search criteria as this is the cost centre.

- Click on **Next >**

The following screen will be displayed:

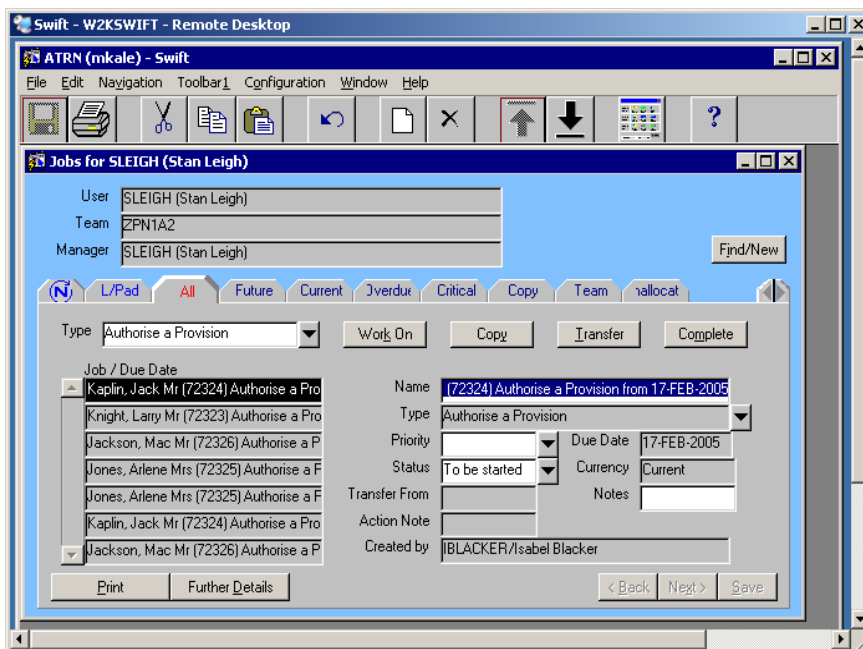


Your own name will always appear on this screen along with the person you have searched for

- Click on the name of the person from the list of workflow users found.

- Click on **Finish >**

The screen will then display the jobs for the selected person:



- Work On the jobs as required either viewing all job types or by selecting specific job types to work on. Refer to *Workflow – Actioning / Working On a Job* section of this manual.
- To return to your own jobs, click on **Find/New** and search for your own name.