Support Services
User Guide

Contents

1. NEC Support Services

1.1 Introduction

The NEC Housing Support Services module is designed to hold information regarding various groups of people in need of support.

This may be young or elderly people groups whose needs will be quite different as will the information to be held about them and services to be offered to them.

1.2 Main Areas

There are four main areas to the module: Clients, Referrals, Assessments and Support Periods

1.2.1 Clients

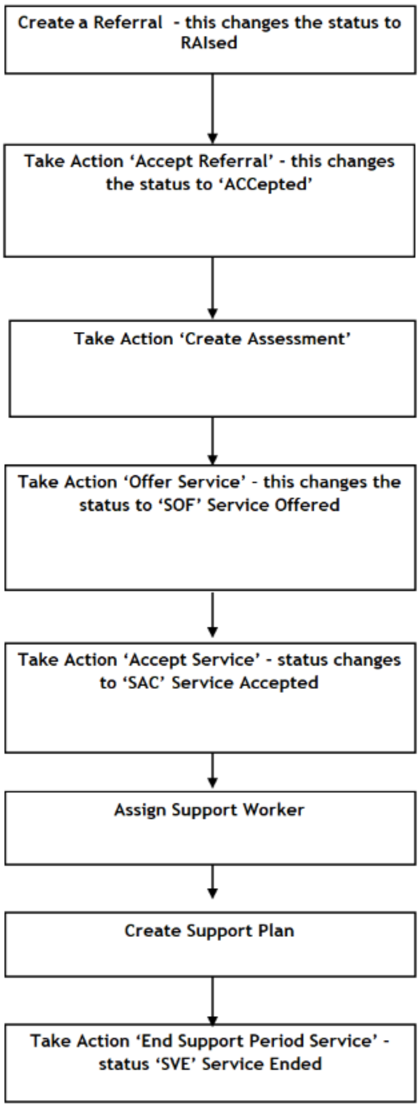
Support Services can hold information regarding a client as follows:

- Countries
- Economic Statuses
- Language Competence Levels
- Qualification Types
- Medications
- Medication Frequencies
- Person Attribute Categories
- Party Association Roles Attributes
- People Attribute Allowed Values

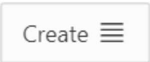
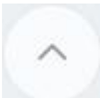
1.2.2 Referrals

Referrals can be received from many sources requesting support and services for all sorts of clients. Teams of people and support providers will be available to supply the support for services. Certain questions may be linked to the referrals and or services. Reasons are also configured for the organisation closing the referral and the client refusing the service.

1.3 Process Order Flowchart



1.4 System Icons:

Icon	Description
	Click the **Main Row Action** icon to view a list of different areas within the system. (THE BURGER)
	Click the **More Chevron** icon to access the business and functional areas of the application.
	Click the **Row Action** icon to access a list of values from which you can select an action to perform.
	Click the **Create** icon to open the form or wizard used to create a record.
	Click the **Open** icon to view the contents of a region or form.
	Click the **Close** icon to hide the contents of a region or form.
	Click the **Next Page** icon to view the next set of records in a summary page region.
	Click the **Previous Page** icon to view the previous set of records in a summary page region.
	Click the **Expand/Collapse** icon to display additional information relating to the corresponding record or to hide this additional information.
	Click the **Start of Page** icon to allow the system to automatically scroll up to the start of the summary or details page you are currently on.
	Click the **Select this record** icon to select the record in the corresponding row to display associated child regions.
	Click the **Advanced Search** icon to access an advanced search from a summary page.
	Click the **Last Query** icon to resubmit the last query performed.
	Click the **Help** icon to open the online help topic relating to the page, region or form you are using. The help button appears in the top banner or footer.
	Click the **Help About** icon to view further information about the region or form you are currently in.
	Click the **Cancel** icon to close the region, form or screen you are in without saving your changes.

	Click the **Mobile** icon to indicate that you are using a mobile device. The screen will adapt so that it is fully optimised when in this mode.
	Click the **Desktop** icon to indicate that you are using a desktop. The screen will adapt so that it is fully optimised when in this mode.
	Click the **Cards View** icon to change the way in which the search results are displayed. This icon is only available in the **MyPortal 360View** page.
	Click the **Report View** icon to change the way in which the search results are displayed. This icon is only available in the **MyPortal 360View** page.
	Click the **More** icon at the top of a details page to display more links that you can use to navigate to different regions.
	Click the **Calendar** icon to select the date you want from the pop-up calendar that appears. Alternatively enter the date using your keyboard.
	Click the **Open Search Page** icon to open a secondary form where you can enter your search criteria.
	Click the **Select List** icon to select the item you want from the pop-up list that appears.
	Click the **System Menu** icon to a view drop down list from which you can perform the following actions: **Preferences** - The **Display Preferences** page will open, and you can set your user preferences for the system. **Help** - The online help homepage will open where you can search for further information. **Password** - The **Change Password** form will open, and you can change your password for the system. **Log Off** - You will be logged off the system.
	Click the **Excel** icon to export the records held within the region to your computer as an Excel document.
	Click the **Add Row** icon to add a new row to a form in a wizard.
	Click the **Remove this row** icon to remove a row from a form in a wizard.
*	This icon denotes a mandatory field where information must be entered before a task can be completed.

	Click the **Reset** icon to reset your selections back to the default settings.
	Click the **Move** icon to move your selection to another area.
	Click the **Move All** icon to move all your selections to another area.
	Click the **Remove** icon to remove your selection.
	Click the **Remove All** icon to remove all your selections.
	Click the **Top** icon to move your selection to the top of the list.

There are five types of errors:

Type of Error	What this means
E – Error	Action needed to be taken to continue process
I – Information	For information
Q – Question	Likely to be a mandatory field
V – Validation	For information
W – Warning	Action needed to be taken to continue process

2. Support Services Glossary

Activity Types

Activity types are support activities that take place, for example, home visits, phone calls, cleaning, shopping etc.

Client Services

Client services are based services such as Environmental risk assessment, Pre-Tenancy and Right There.

Client Service Question Groups

Question groups are used to subdivide questions within a category and group similar questions together. For example, within Referral Questions there are questions relating to all the questions the team member needs to know before carrying out the Assessment.

Closed Reasons

Once a referral has been logged on the system it may become necessary to close it before the client has been accepted for and offered a service. For example, the organisation may reject the referral as the client is not suitable for the service, or the client may not wish to, or is unable to proceed.

Coded Responses

Allowable response to a coded question, where the user must select the answer in order to provide the information required.

Exit Reasons

Exit reasons are used to record the reason why a support period service ended. For example: Taken into custody, moved to a nursing home and completed a programme so the service is no longer needed.

Language Competence Levels

A client may have oral or written knowledge of more than one language with differing levels of proficiency. The language competence levels of a client can be directly related to various factors including age, education, mental and physical health, and ethnic origin.

Medical History

Various groups of clients, for example, those with drug or mental health problems or the elderly, are more likely to be under medical supervision and care, and as such may be taking medication or be in receipt of prescribed medication. A client’s medical history will be an important factor in whether or not they should receive services.

Medicine Frequency

All prescribed medication has instructions on how it should be administered. This includes how often it should be taken, the method and amount to be taken.

Party Association Role

Defines a role in which a person, organisation or interested party can be associated with a party.

People Attributes

People attributes are used to capture an infinite amount of additional information about a person. These attributes are then grouped together into person attribute categories.

Person Attribute Categories

Person attribute categories are groups of additional details about people, for example, disabilities, communication skills or requirements etc.

Questions

Questions are used to record additional background information about a referral or assessment.

Referral

A referral is a request for a client to receive support. Referrals can be from another organisation, an interested party or directly from a client - self-referral. A referral records basic client details.

Referral Source

The referral source is the route by which the client was referred to your organisation for a service. This could have been via a relative, the tenants Doctor, Roofs, a voluntary agency, support worker, etc.

Referred by Type

Person – Record a standard party name.

Interested Party – Party with an interested party type attached to them, Doctor, Social Worker etc.

Support Provider – another Support Provider setup on NEC Housing linked to services.

Self-Referral

When the client is referring themselves to you negating the need to record a Referral Source (however a Referral Source may still be recorded if parameter settings allow it).

Service Refused Reasons

Clients who are accepted for and offered services, sometimes decline them as they are no longer in need of the service. For example, they may have been admitted to hospital or moved away whilst assessments were being carried out.

3. Clients

The Client is the person to whom the support services are given.

When a client is referred to your organisation for support, you will need to gather information about them.

This information includes personal details such as name, address, contact details, date of birth, ethnic origin, economic status, language competency, any medical conditions they may have in order to provide suitable support.

In addition to this you will also need to record any further information about a client such as known disabilities and special needs. This information will be contained within person attributes, which can be created, edited and deleted as necessary.

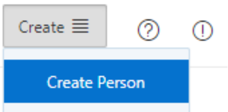
The role of other people, organisations or interested parties associated with a client are also recorded, for example, a client next of kin, their Doctor, Support Agency, Emergency Contact etc.

As well as personal information and person attributes, details of employment, training history and further training requirements are all included in client details to ensure the correct support service is provided.

3.1 Creating a Client (Creating a Person)

To complete this task, perform the following steps.

1. Click Housing.
2. Click Support Services – the Default Summary page appears.
3. Click Clients – the People summary page appears.
4. Click Create ≡ from the People region and select Create Person.



The Party Details Search Criteria subregion opens.

5. Enter your search criteria.
6. Click Search
7. Do one of the following

- If records are returned, go to step 7.
- If no records are returned, go to step 8.

Note: If no person exists, the message No data found is displayed.

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8. Check the results to see if the person already exists in the system.

- If the person you want appears in the list of results, click Select in the corresponding row. The People summary page reappears with the person’s details in context and the Create Person action is terminated.

- If the person does not appear, go to step 8.

Note: If no person exists, the message No data found is displayed.

9. Click Create Person

The Create Person wizard appears.

10. Enter the relevant data in the Create Person wizard.
11. Click Save

The new person appears in the People summary page region.

The person has been created.

3.2 Updating People

The following areas relating to the client can have information created/updated/deleted (depending on User Security): -

- Surname History
- Contact Details
- Person Attributes
- Notes
- Language Skills
- Household Members
- Party to Party Assignments
- Tenancies
- Applications
- Referrals
- Assessments
- Advice Cases
- Medical History
- Medication
- Address Usages
- Other Fields

In order to build up a profile of the client some of the above areas can have information associated with them.

3.3 Updating a client.

To complete this task, perform the following steps.

1. Click Housing.

2. Click Support Services.

The default summary page appears.

3. Click Clients.

The People summary page appears.

4. Enter your search criteria in the Search subregion.

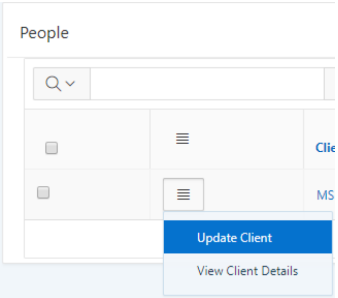
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.

5. Click 

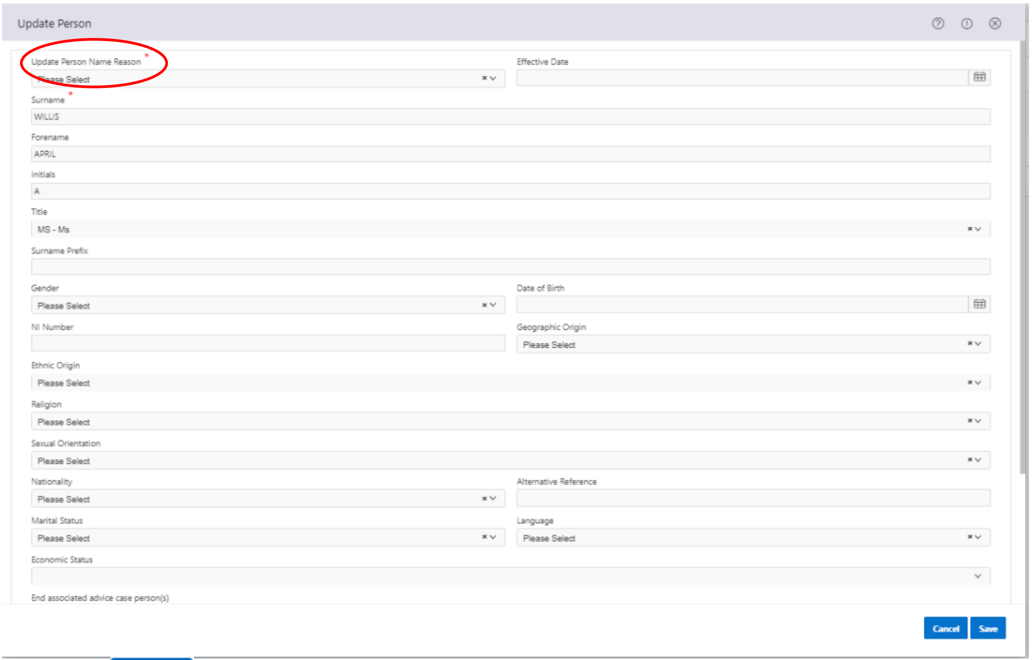
.

The records that meet your search criteria appear in the People region.

6. Select **Update Client** from the Row **Actions list** in the appropriate row. The Update Person subregion appears immediately below the record selected with the reference data in context.



7. Enter the relevant data in the Update Person subregion, ensuring that you enter a Update Person Name Reason – (if updating the name itself).

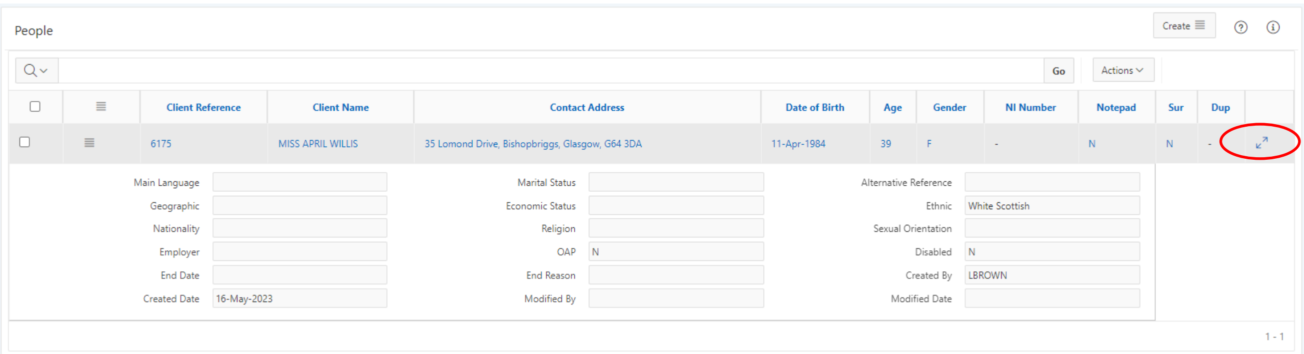


8. Click 

The subregion closes and you are returned to the People region.

The changes you made to the client have been applied.

To view the extra data not on display in the master record, use the expand icon to open the rest of the record to display: -



4. Person Attributes

Person Attributes enable the recording of any amount of additional information against a Client that helps to deliver a better service to them. These could be details, for example, about their health, mobility requirements or communication requirements. They could be verification details, details about their accommodation, their pets or other circumstances.

Holding information directly against the Client means it is not duplicated should the Client be in receipt of multiple services. Key Details may be used throughout NEC Housing to display important and relevant information about a Client to Users in any business areas; this information could be based on Person Attributes.

Job Role Security may also be applied to prevent the viewing, creating and / or maintaining of certain attributes.

The Person Attributes region (HSS-CLI-ATTRS) is displayed on the Client Details Page in Support Services and on the Person Details Page in Estates.

Based on configuration, Person Attributes can capture a period of time that the information is relevant for so that, if required, the attribute can be ended. Based on the configuration of the Person Attribute, it is also possible to flag that an attribute requires regular review and define the review period, thereby enabling regular review of the presence of certain characteristics.

Person Attributes can be maintained singularly using the Create, Update and Delete actions, or in bulk using the Maintain Person Attributes wizard, which provides for a multi-row region where records can be inserted, updated or removed.

Variable Warning Actions can be used to apply business rules that need to be validated before records are processed and in the context of the selected Person Attribute, the Warning (HSS-APP-WHI) child region shows details of all Warnings that have been generated for the Person Attribute.

Any amount of further information about a Person Attributes can also be captured via Other Fields that are configured so they are specific to the selected Attribute.

When creating a Person Attribute, if it has Review Required Indicator set to Y, the system will automatically set the Reviewed to be checked (Yes), and the Review Date will default to the current date plus the Review Period Unit/Review Period Quantity value. This defaulted Review Date can be updated if required to a date not less than current date.

When a Person Attribute is updated, and the Review Date is set to current date or less, then the Reviewed field will be set to unchecked, so that the User can update the field. The updating of the Reviewed field to checked (Yes) is optional at this time, as it could be that the update being performed is not in respect of that specific Person Attribute. The Person Attribute Review Date will remain unchanged in these circumstances.

If the Reviewed field is checked, then the Person Attribute Review Date will be updated to the current date plus the Review Period Unit/Review Period Quantity value. This defaulted Review Date can be updated if required to a date not less than current date.

4.1 Recording Person attributes

1. Click Housing.

The Housing menu expands.

2. Click Support Services .

The Support Services menu expands.

3. Click Clients.

The Clients page appears.

4. Enter your search criteria in the Search area.

If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.

5. Click Search.

The records that meet your search criteria appear in the People region.

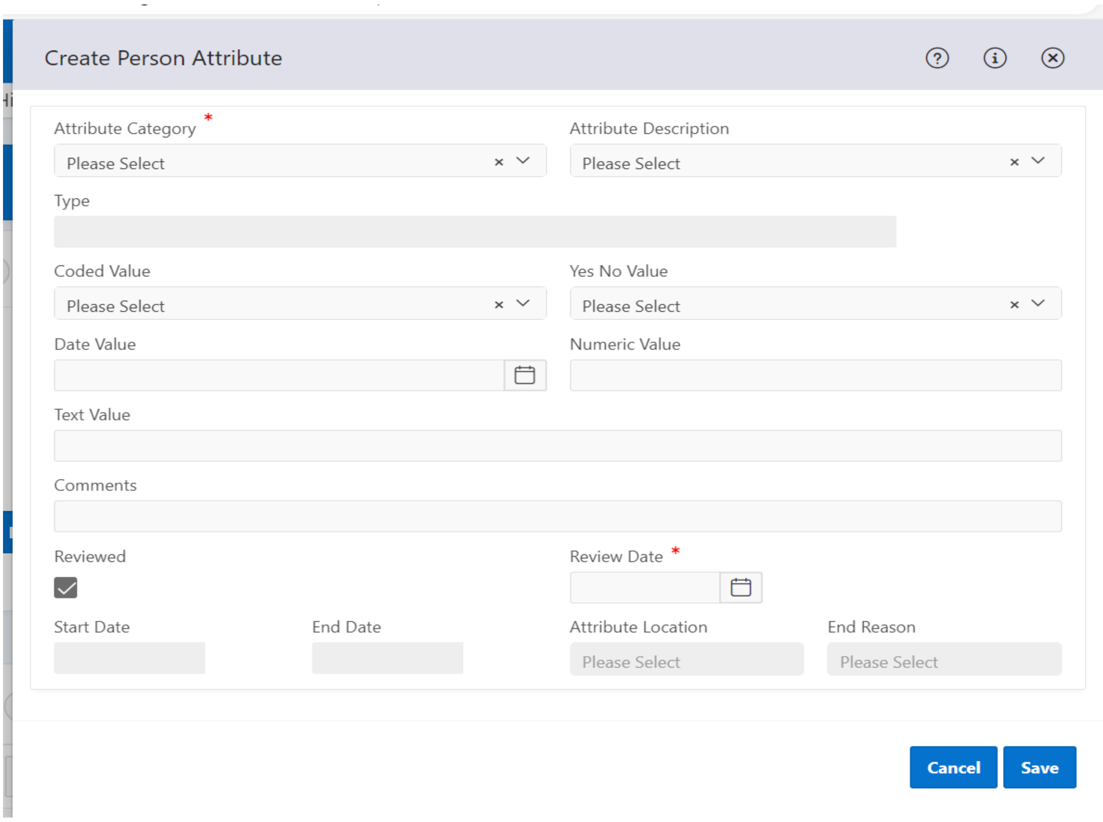
6. Select View Client Details from the corresponding Row Action list .

The Client details page appears.

7. Click the Person Attributes link at the top of the screen.

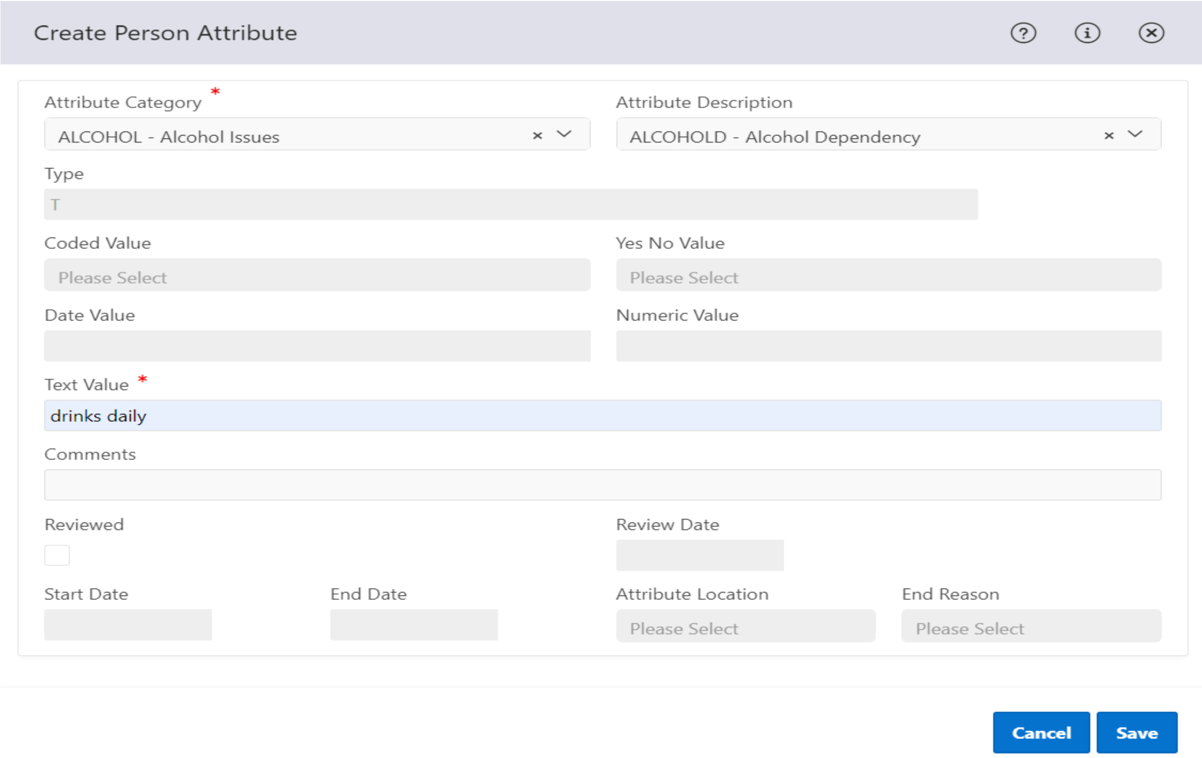
The system scrolls down to the Person Attributes region.

8. Select Create Person Attribute from the Create list at the top of the region.



The Create Person Attributes form appears.

9. Enter the relevant data in the form.



10. Click Save.

The form closes and you are returned to the Person Attributes region.

The person attribute has been created.

4.2 Language Skills

The Language Skills region (HSS-CLI-LANGS) is only available in Support Services and allows one or more languages for the Client to be recorded. Against each language the Client's Spoken Level, Written Level and Reading Level may be captured. A 'Main' flag against a language denotes this is the main language for the Client.

If the System Parameter 'UPD_LANG_FROM_SKILL' (Update Per lang using Per Lang Skill) is set to 'Y' then any updates to the main language via the Language Skills region will update the Main Language as held against the person record.

1. Click Housing.

The Housing menu expands.

2. Click Support Services .

The Support Services menu expands.

3. Click Clients.

The Clients page appears.

4. Enter your search criteria in the Search area.

If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.

5. Click Search.

The records that meet your search criteria appear in the People region.

6. Select View Client Details from the corresponding Row Action list .

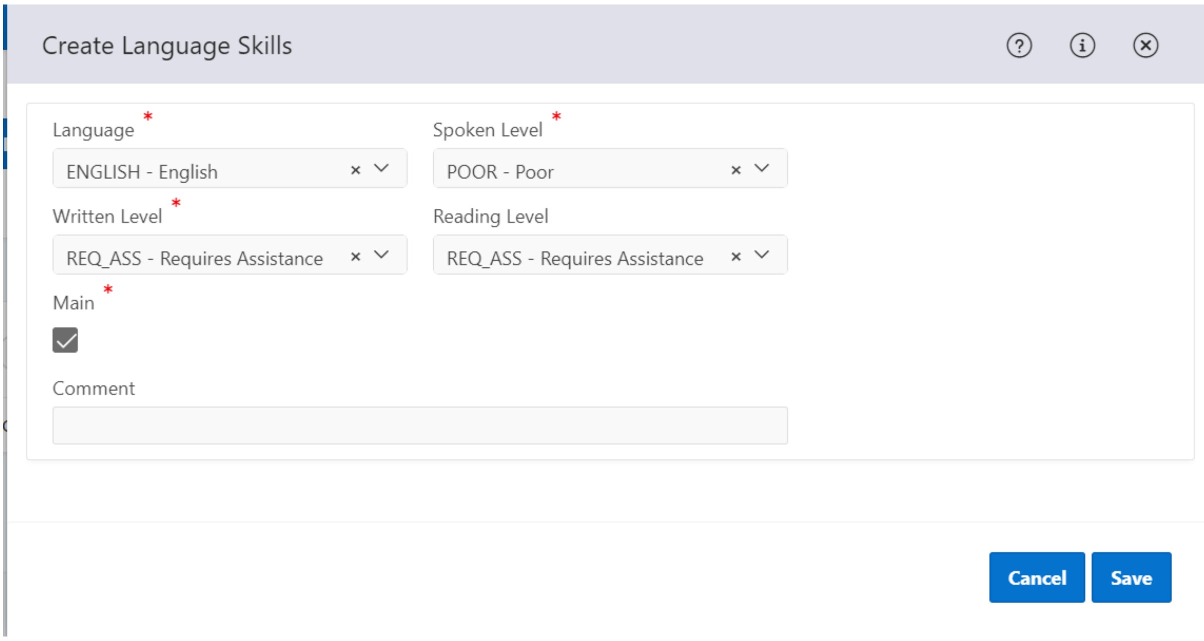
The Client details page appears.

7. Click the Language Skills link at the top of the screen.

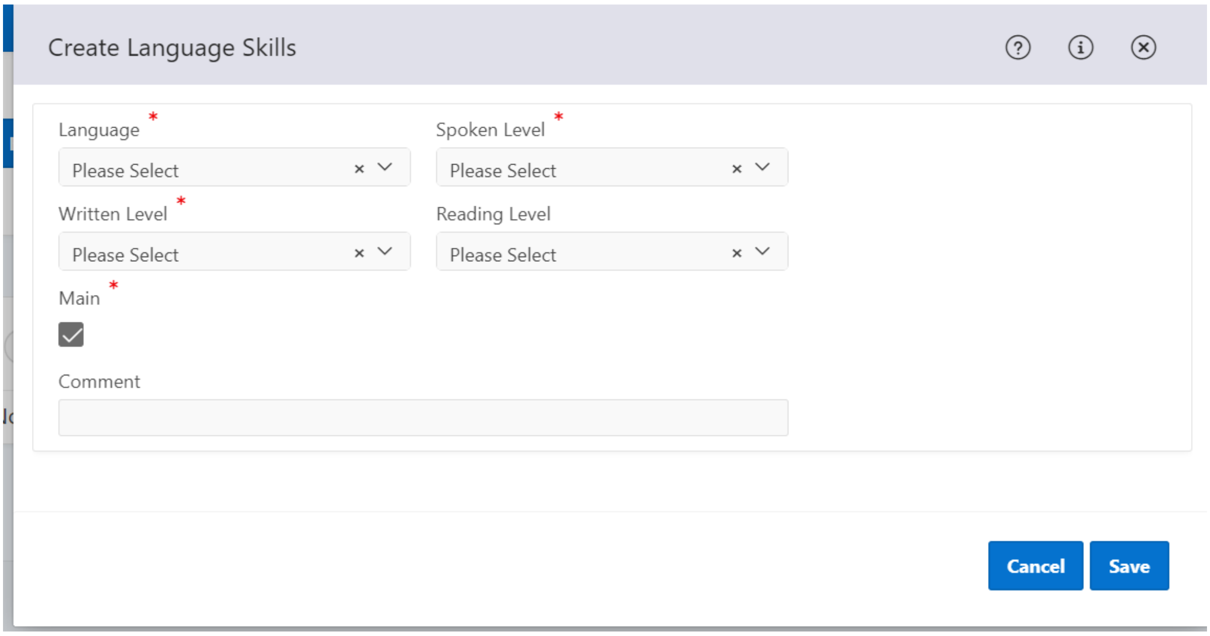
The system scrolls down to the Language Skills region.

8. Select Create Language Skill from the Create list at the top of the region.

The Create Language Skills form appears.



Enter the relevant data in the form.



9. Click Save.

The form closes and you are returned to the Language Skills region.

The language skill has been created.

4.2 Medical History

Specific to Support Services the Medical History region (HSS-CLI-MEDHS) allows the medical history of the Client to be recorded.

4.3 Medication

The Medication region (HSS-CLI-MEDIC) allows the medication that a Client is taking to be recorded together with frequency and dosage. The list of available Medicines is configured in System Setup. Job Role Security may be applied to Medicines to restrict the viewing and / or creating and maintaining of medication records.

4.3.1 Creating Client's Medication Records

1. Click Housing.

The Housing menu expands.

2. Click Support Services .

The Support Services menu expands.

3. Click Clients.

The Clients page appears.

4. Enter your search criteria in the Search area.

If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.

5. Click Search.

The records that meet your search criteria appear in the People region.

Do one of the following:

6. Select View Client Details from the corresponding Row Action list .

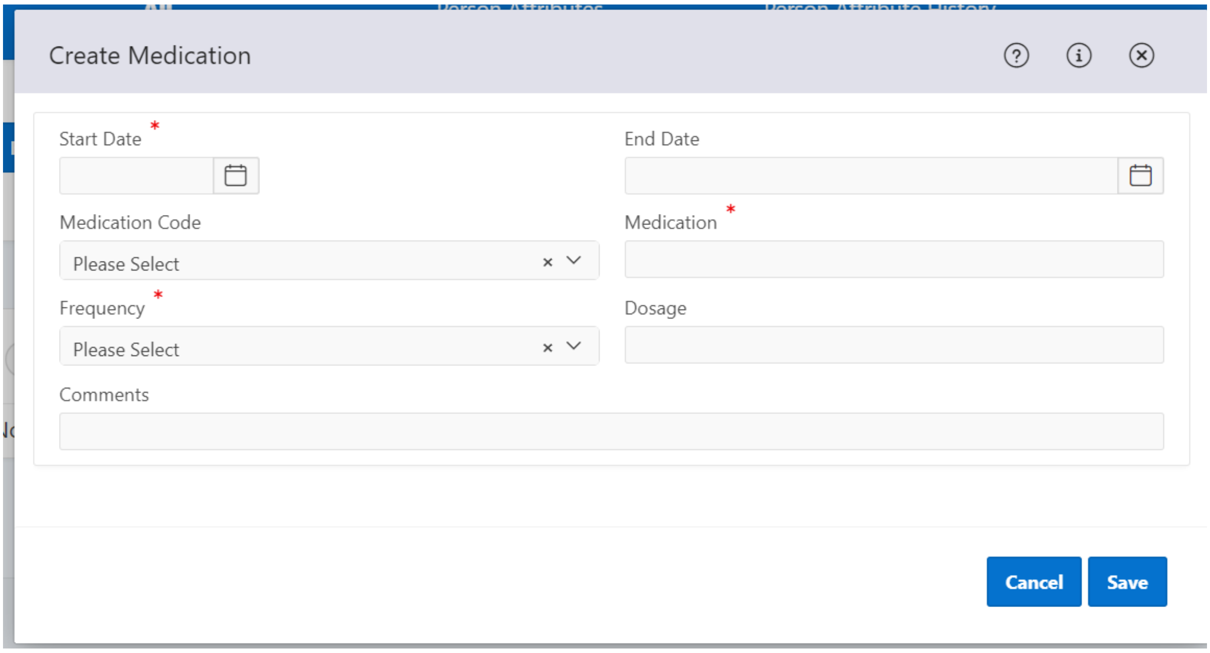
The Client details page appears.

7. Click the Medication link at the top of the screen.

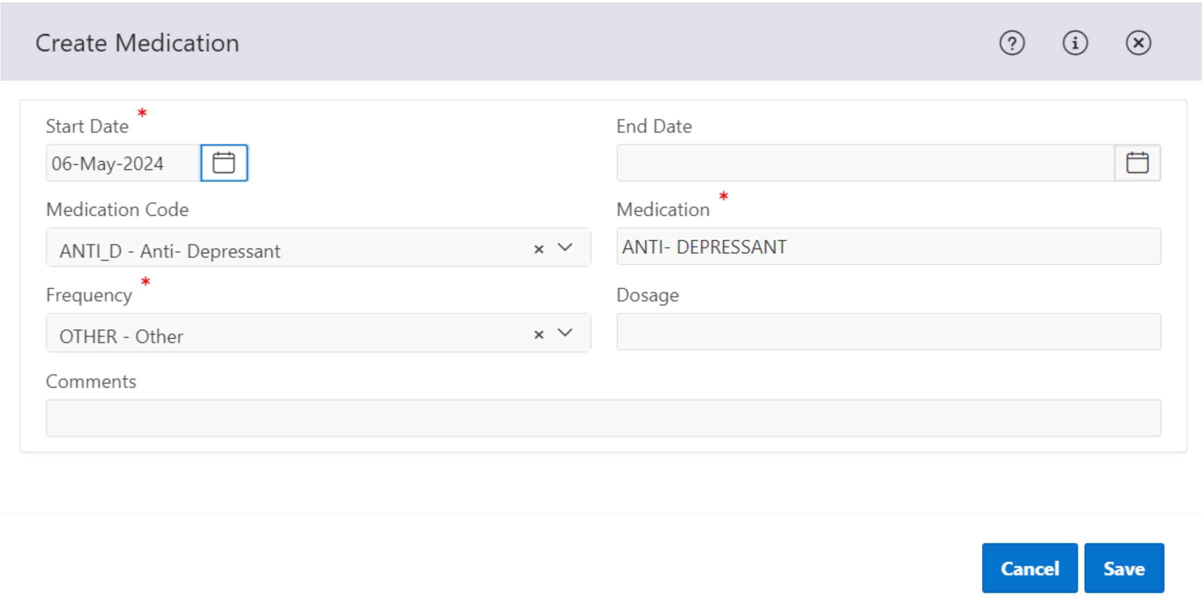
The system scrolls down to the Medication region.

8. Select Create Medication from the Create list at the top of the region.

The Create Medication form appears.



9. Enter the relevant data in the form.



10. Click Save.

The form closes and you are returned to the Medication region.

The medication record has been created.

4.3.2 Updating Client's Medication

1. Click Housing.

The Housing menu expands.

2. Click Support Services .

The Support Services menu expands.

3. Click Clients.

The Clients page appears.

4. Enter your search criteria in the Search area.

If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.

5. Click Search.

The records that meet your search criteria appear in the People region.

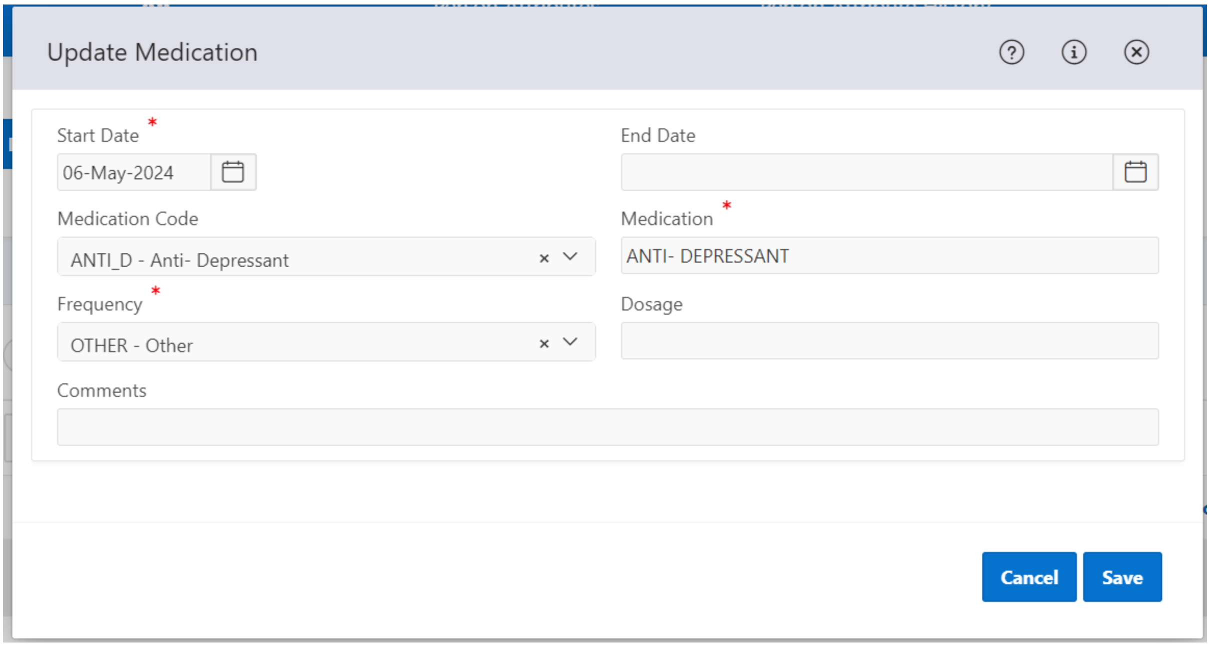
6. Select View Client Details from the corresponding Row Action list .

The Client details page appears.

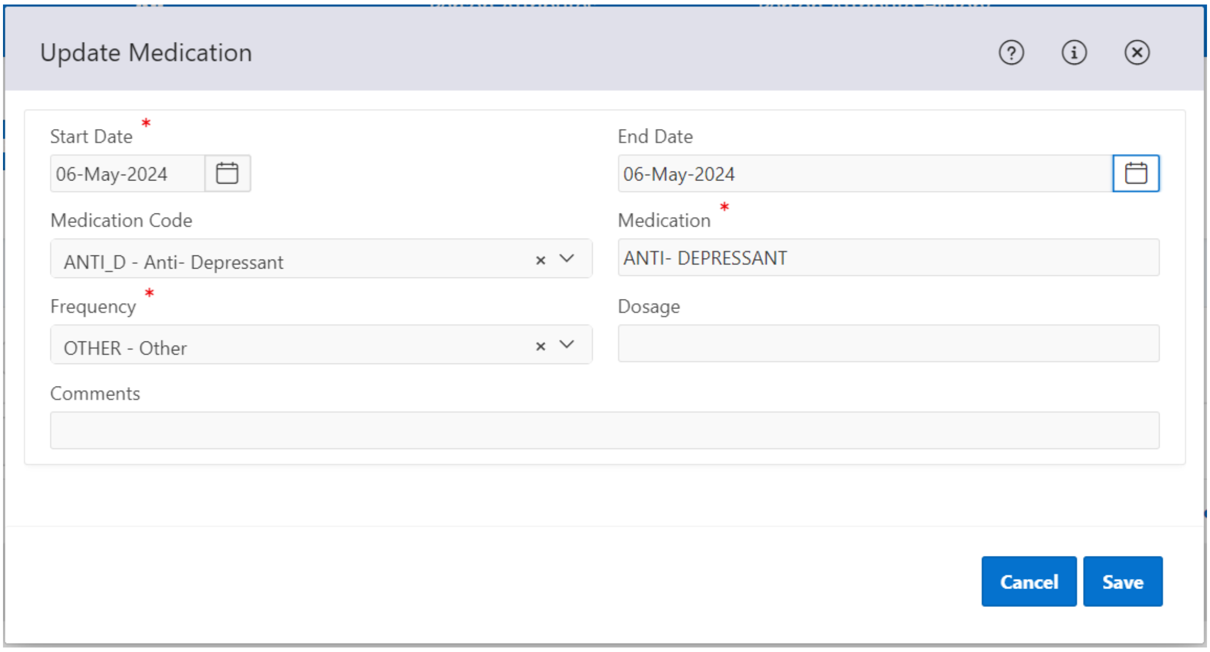
7. Click the Medication link at the top of the screen.

8. Select Update Medication from the Row Action list corresponding to the record you want to update.

The Update Medication form appears.



9. Enter the relevant data in the form.



10. Click Save.

The form closes and you are returned to the Medication region.

The changes you made to the medication have been applied.

5. Referrals

A referral is a request for a client to receive support. Referrals can be from another.

organisation, an interested party or directly from a client - self-referral. A referral records basic client details.

It is also possible, subject to the setting of a system parameter, to record referrals to

other support organisations working in your area. Where clients are referred to different organisations over a period the recording of this enables useful client history to be captured.

Much of the information relating to a referral is captured in user-defined questions; these can reflect the questions asked on a referral form. It is possible to configure different questions according to the type of service the client required. These services may differ perhaps according to the age group of the client.

5.1 Creating a Referral

To complete this task, perform the following steps.

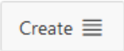
1.Click Housing.

2.Click Support Services.

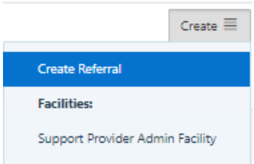
The default summary page appears.

3.Click Referrals.

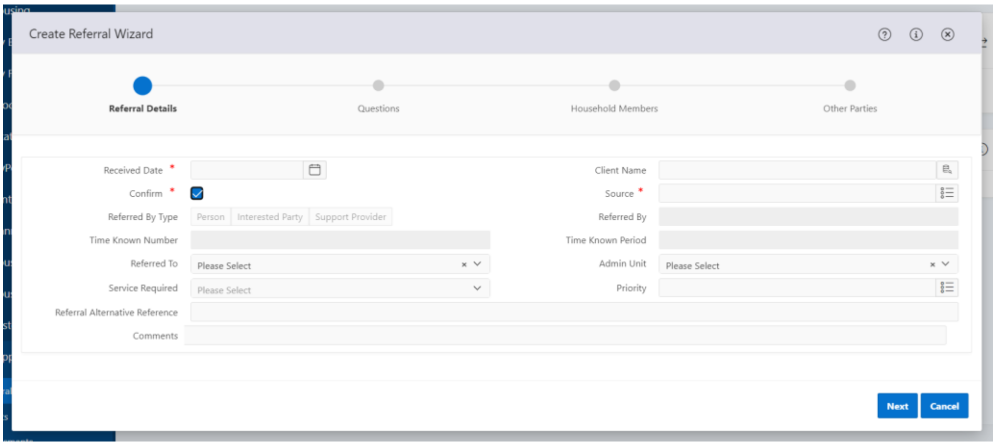
The Referrals summary page appears.

4.Click 

5.Select **Create Referral** from the **Create list** in the region banner.



The Create Referral Wizard appears.



6.Enter the below relevant data in the **Create Referral Wizard**.

1. Received Date
2. Tick Confirm Box
3. Referred To
4. Service Required
5. Client Name – Use search button to search for the client first
6. Source – EDC Housing

Click .

The new referral appears in the Referrals region.

The referral has been created.

5.2 Accepting a Referral

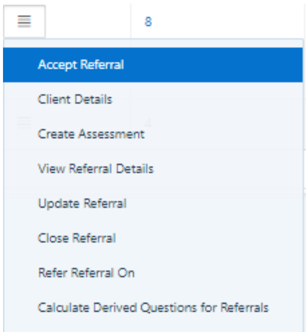
To complete this task, perform the following steps.

Note: A referral can only be accepted if it has a status of RAI (raised).

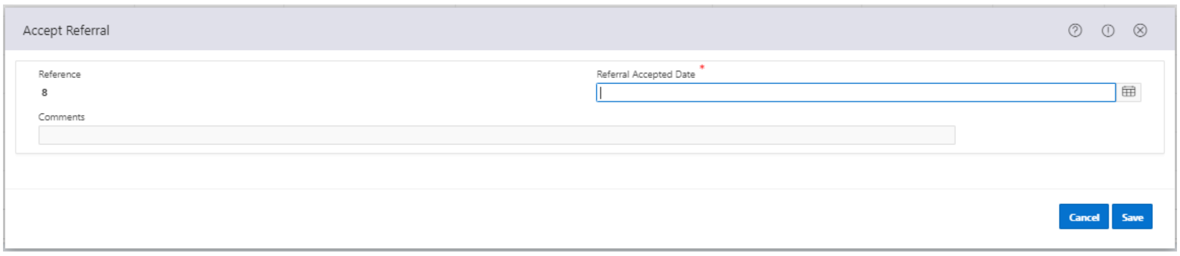
Note: A referral cannot be accepted until all mandatory questions for that service have been answered and any mandatory assessments for the service have been carried out.

---

1. Click **Housing**.
2. Click **Support Services**.
   The default summary page appears.
3. Click **Referrals**.
   The Referrals page appears.
4. Enter your search criteria in the **Search** subregion.
   If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria. For further information, see either the Search or search criteria topics.
5. Click Search.
   The records that meet your search criteria appear in the Referrals region.
6. Select Accept Referral from the Row Actions list in the appropriate row.



The Accept Referral subregion appears immediately below the record selected with the reference data in context.



7. Enter the relevant date and any comments in the Accept Referral subregion.
   For further information see the page describing the Accept Referral subregion.

8. Click 

.

The updated referral appears in the Referrals region.

The status of the referral is updated to **ACC** (accepted)

5.3 Closing a Referral

If at any point prior to accepting a service you wish to close a referral follow these steps:

1. Click **Housing**

2. Click Support Services.

The default summary page appears.

3. Click Referrals.

The Referrals summary page appears.

4. Enter your search criteria in the Search subregion.

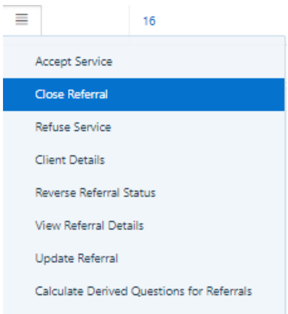
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.

5. Click 

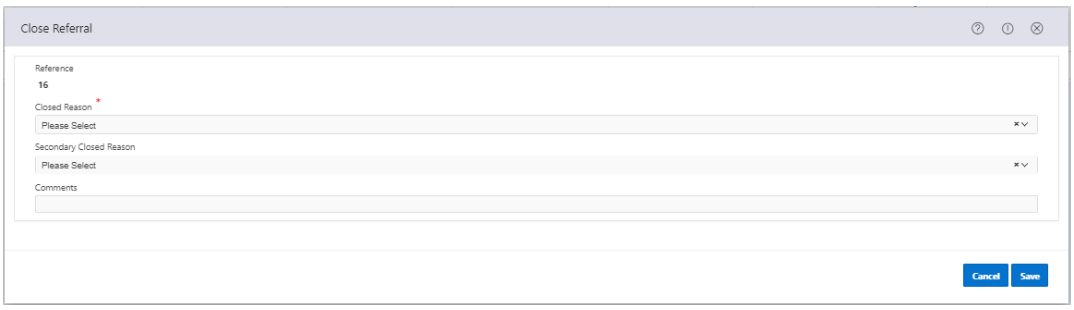
.

6. The records that meet your search criteria appear in the Referrals region.

7. Select Close Referral from the Row actions list in the appropriate row.



The Close Referral subregion now opens.



8. Enter the relevant data in the Refuse Service subregion.

9. Click Save.

The subregion closes and you are returned to the Referrals region.

5.4 Reversing a Referral Status

Provided the referral status has not reached **Service Accepted (SAC)**, you can reverse the status of a Referral to the previous stage, to so follow these steps:

1. Click **Housing**

2.Click Support Services.

The default summary page appears.

3.Click Referrals.

The Referrals summary page appears.

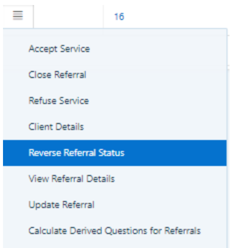
4.Enter your search criteria in the Search subregion.

If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.

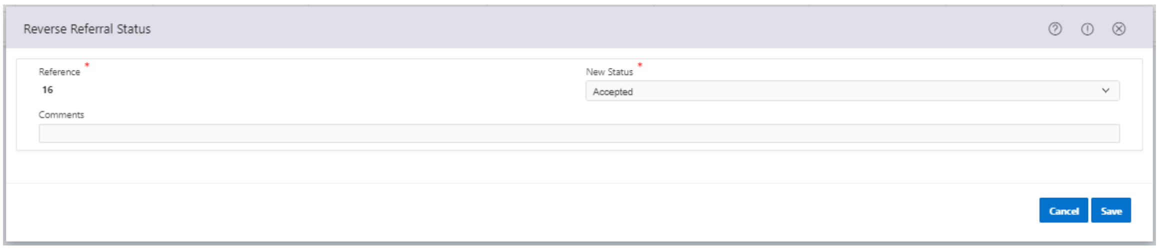
5.Click Search.

The records that meet your search criteria appear in the Referrals region.

6.Select Close Reverse Referral Status from the ≡ Row actions list in the appropriate row



The Reverse Referral Status subregion now opens.



7.Enter the relevant information Reverse Referral Status subregion

8.Click Save.

The subregion closes and you are returned to the Referrals region.

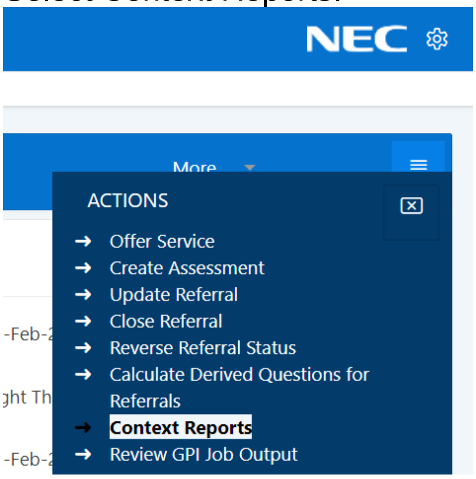
6. Referral Forms

6.1 Producing a Referral Form

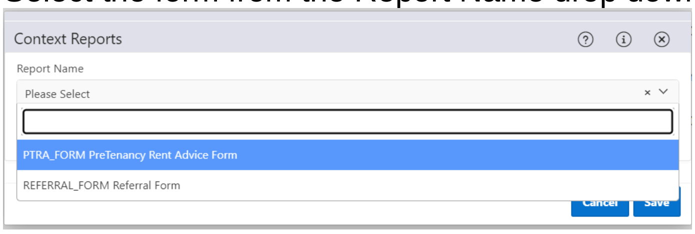
The Referral has now been created on the system. To produce the form, follow the below steps.

1. Click Housing.
2. Click Support Services.

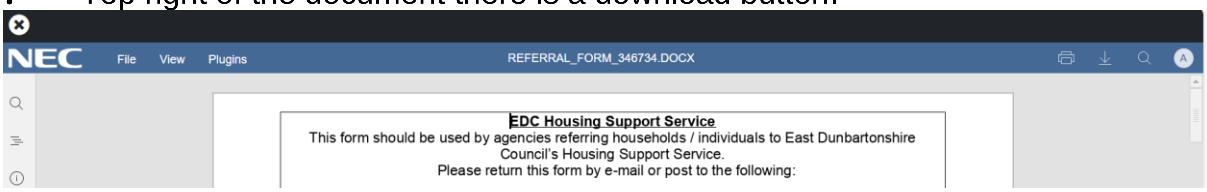
   The default summary page appears.
3. Click Referrals.
4. Search and select the Referral you wish to produce form for.
5. Select the Actions Menu (top right hand corner of page).
6. Select Context Reports.



7. Select the form from the Report Name drop down.



8. Then select Save and Save again when new window appears.
9. Form should open in a word document in a new window.
10. Additional info can be free typed onto the form.
11. Top right of the document there is a download button.



12. Click this and save within House Files.
13. Email to relevant Housing Officer.