



Social Care Set Up

Settings

General Setting, group of settings number 1300 needs to be set to Y. Colours 490 and 500 allow you to set a colour for the recipient and carer records so they can easily be identified.

Two person states need to be added with Specific IDs

- [- Care Recipient/Service User
-] - Care Contact/Service User Contact

One client state needs to be added with a specific ID

- [- Service Care Funder

Social Care Types are set up in Maintenance - Agency Set Up - Social Care Types. Used to classify Care Contacts into useful groups eg Parent, GP, Social Worker etc.

Users need to have the 'Can Maintain Social Care' Role.

Records

Person Records need

Care Recipient: A Person Record with name and address, etc of state 'Care Recipient'

Care Contact: A Person Record with name and address, etc of state 'Care Contact'

Company Records need

Funder: A Client Record with name and address, etc and Account Code, of state 'Funder'

Vacancies

These will have a Social Care View, below Timesheets

Web Description	Find/New Recipient	Expand Recipient	Remove Recipient
Placements	Recipient		
Interventions	Funder 1	IQX Social Care Service	
Timesheets	Funder 1 Limit		
Social Care Setup	Funder 1 Reference	IQX Social Care Service	
Site Details	Funder 2	IQX Social Care Service	
Web Publish	Funder 2 Limit		
Miscellaneous	Funder 2 Reference		
Location Map	Funder 3	IQX Social Care Service	
Shift Templates	Funder 3 Limit		
Vacancy Limits	Funder 3 Reference		

To add the recipient press the Find/New Recipient button. Either search for a recipient by keyname, highlight and press Select or press the New button to create a new recipient.



A screenshot of a 'Select Recipient' dialog box. It features a 'Keyname' search field with the letter 'S' and a 'Find' button. Below is a table with columns 'Number', 'Name', and 'Address'. The table lists several recipients, with 'Viola Sands' highlighted. At the bottom are 'Select' and 'Cancel' buttons.

Number	Name	Address
10048	Viola Sands	
10045	Sue Semple	
10026	Robert Singleton	515 Winston Crescent Newland Road
10044	Sarah Socrates	4 The Street
10061	Sharon Soul	
10093	Mark Standford	32 Longer Street
10026	Adam Stuart Sweet	56, Kent Rd Giltbrook

Then in the Funder lines you can select the appropriate Funder and add limits and references.

Expand Recipient will open the recipient record, the Social Care View allows you to add the contacts, select type (e.g. Doctor, Neighbour, Family) and free type notes.

A screenshot of the 'Robert Singleton' record view. It shows a sidebar with 'Social Care', 'Notes', 'Documents', and 'Photo'. The main area displays personal details like 'Name', 'State', 'Available From', 'Personal', 'Home Phone', 'Day Phone', 'Mobile', 'Email', 'Address', 'Source', and 'Consultant'. Below this is a table for 'Add' and 'Delete' actions, with columns for 'Person', 'Type', and 'Description'. The table shows 'Dr Colin Carthers' as a 'Doctor' with 'Freestyle notes'.

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