

Service User Recording User Guide

Editing Service Information Forms

Believe in
children



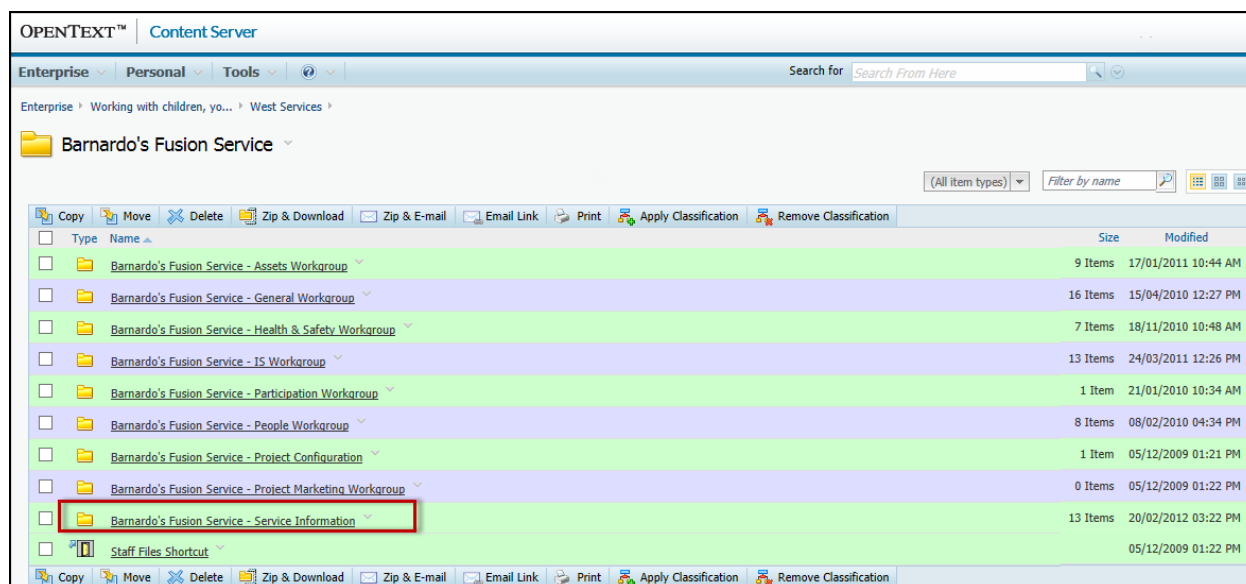
Each Barnardo's service has some key service information that is recorded in Service Information forms. These forms are created when the service File Room is set up. This user guide details how to add and edit the information on these forms.

Note: If these forms are not kept up to date many management reports and some features of the Core Data forms in case files will not function correctly.

Locating your Service Information Forms

Your Service Information forms are located in a folder in your main Service folder. The example below shows the Service Information folder for a typical service.

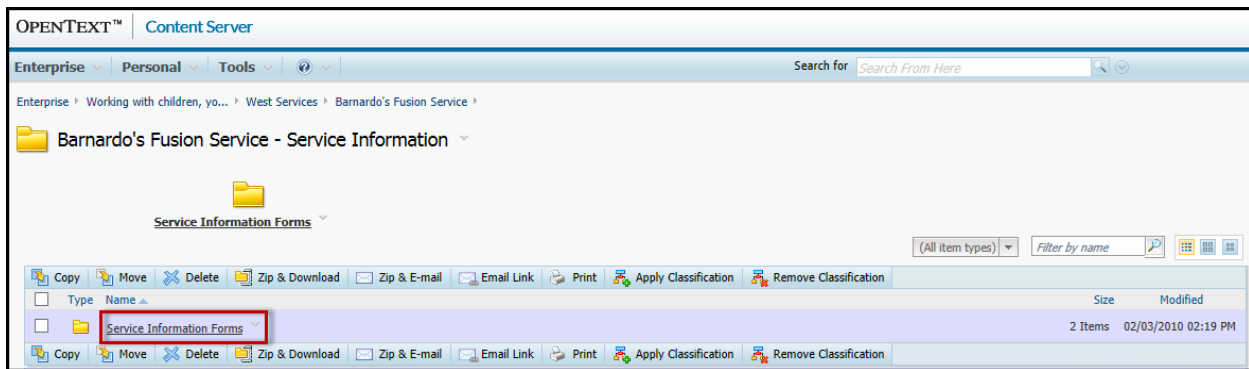
To access your Service Information forms:



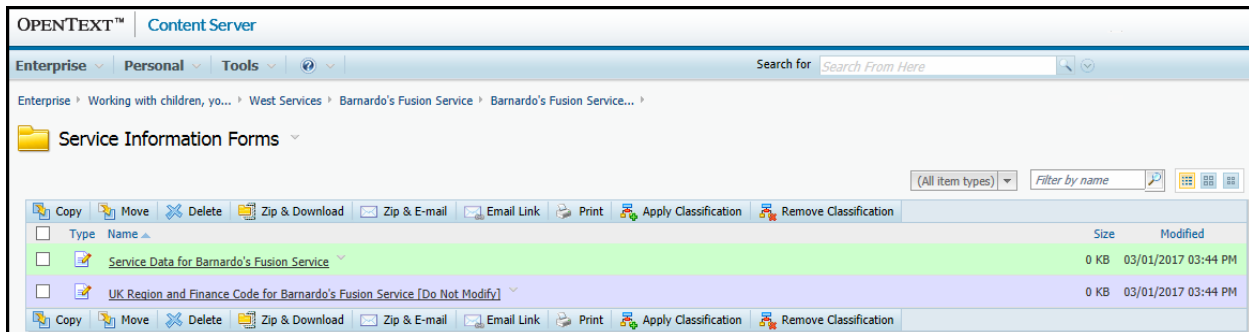
The screenshot shows the OpenText Content Server interface. The breadcrumb path is Enterprise > Working with children, yo... > West Services > Barnardo's Fusion Service. The folder list includes:

Type	Name	Size	Modified
Folder	Barnardo's Fusion Service - Assets Workgroup	9 Items	17/01/2011 10:44 AM
Folder	Barnardo's Fusion Service - General Workgroup	16 Items	15/04/2010 12:27 PM
Folder	Barnardo's Fusion Service - Health & Safety Workgroup	7 Items	18/11/2010 10:48 AM
Folder	Barnardo's Fusion Service - IS Workgroup	13 Items	24/03/2011 12:26 PM
Folder	Barnardo's Fusion Service - Participation Workgroup	1 Item	21/01/2010 10:34 AM
Folder	Barnardo's Fusion Service - People Workgroup	8 Items	08/02/2010 04:34 PM
Folder	Barnardo's Fusion Service - Project Configuration	1 Item	05/12/2009 01:21 PM
Folder	Barnardo's Fusion Service - Project Marketing Workgroup	0 Items	05/12/2009 01:22 PM
Folder	Barnardo's Fusion Service - Service Information	13 Items	20/02/2012 03:22 PM
Folder	Staff Files Shortcut		05/12/2009 01:22 PM

- Click on the **Service Information** folder (highlighted above).



- Click on the **Service Information Forms** folder.




A typical set of service information forms are shown in the illustration above. There are two forms in this case:

- **Service Data** – There will be one or more of these. Each one will be named after the service(s) being provided. These are the forms that you should edit to keep the information about your service(s) up to date.
- **UK Region and Finance Code** form – there will normally be only one of these but in some circumstances there may be more. These forms do not contain any data that you can edit, so you can ignore them.

Note: If you do not have the right number of Service Data forms for the services you provide, please contact your IS Account Manager.

Editing a Service Data Form


- Click on the Service Data form you wish to edit.

 **Service Data**

Service Details

Service Name *


Primary Category *

Secondary Category 

Description * We are undertaking research into the emotional health and wellbeing needs of children and young people aged 11-16 from black minority ethnic communities across Greater Manchester. We have also devised an information pack to raise awareness on the issue of forced marriage

Date Opened *

Date Closed

Cost Centre * 

Locality

Address lookup

Postcode Building no./name

[Lookup address](#) [Don't have the postcode?](#)

Address Line 1 *

Address Line 2

Address Line 3

Town *

County

Postcode *

Country *


Phone *


Fax


Email


Website

Contact Hours *

Responsible Manager * 

1st Line Manager 

Administrator * 

Responsible ADCS * 


Previous Service Name


Service User Recording

All service users are recorded on Content Server *

All service users are recorded on an external system *

Service Regulation and Inspection

Regulators/Inspectors * 

Registration/ Inspection Category * 

Website Visibility


Service Name

Service Address

Phone Number

Email Address

Service Description

Delivery Site Postcode 

Note: All fields marked with a red asterisk are mandatory fields - you will not be able to update the form unless you complete these fields.

Updating the Main Fields

This section covers how to complete the main types of field on the form. For details on the recording policy requirements for the individual fields on the form, see the section entitled "Service Information Completion Guidance" at the end of this document.

Service Name


Service Name *

The contents of this field are particularly important as it is these that are displayed in the Referral Details and Services Received areas on the Core Data form, e.g.

The screenshot shows a 'Referral Details' form with two entries. The first entry has Source: Education, Reason for Referral: Disability, and Service (referred to): Family Support Service. The second entry has Source: Family Member, Reason for Referral: Vulnerable person needing support, and Service (referred to): Barnardo's Fusion Service. The second entry is highlighted with a red box.


Primary Category and Secondary Category

The screenshot shows two dropdown menus. The first is labeled 'Primary Category *' and is set to 'Children's Centres'. The second is labeled 'Secondary Category' and is set to 'Select ...'. There is a green plus icon button to the right of the second dropdown.

The **Primary Category** is a mandatory field. The **Secondary Category** is not mandatory, but you should complete it if any of the entries apply to your service. You can add multiple secondary categories if needed by clicking on the  button.

Cost Centre

The screenshot shows a dropdown menu labeled 'Cost Centre *' with the value '10450' selected. There is a green plus icon button to the right of the dropdown.

This drop-down list contains all of the cost centres assigned to your service. You can add multiple cost centres to the form if needed by clicking on the  button.

Address Fields

You can use the **Address Lookup** area to find an address from a Postcode, e.g:

- Type the postcode into the **Postcode** field highlighted below.
- Click on the **Lookup Address** link below this field.

Address lookup

Postcode Building no./name

[Lookup address](#) [Don't have the postcode?](#)

Address Line 1 *

Address Line 2

Address Line 3

Town *

County

Postcode *

Country *

Select one of the following addresses that matched your entry -

- 1 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 2 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 3 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 4 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 5 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 6 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 7 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- Wetherby Freelance News & Sport, 8 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 9 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 10 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 11 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 12 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 13 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN
- 14 Hall Orchards Avenue, WETHERBY, West Yorkshire, LS22 6SN

Done Local intranet

- Select the appropriate address from the list that appears.

This will populate all of the address fields for you. You can still edit the address if you need to after performing an address lookup.

If you do not have a postcode, but do know the address:

- Click on the **Don't have the postcode?** Link to the right of the address lookup area.

Address lookup

Building number or name

Street

Town or city

[Lookup address](#) [Use postcode](#)

Address Line 1

Address Line 2

Address Line 3

Town *

County

Postcode *

Country

- Fill in as much of the address as you know in the first three fields
- Click on the **Lookup Address** link below these fields.

If you enter enough information for the address to be found, then the address fields will be populated with the correct address and postcode, as shown in the above example.

Service managers, Administrator and Responsible ADCS Fields

Responsible Manager *	<input type="text" value="mike.woods"/>	
1st Line Manager	<input type="text"/>	
Administrator *	<input type="text" value="daniel.sayer"/>	
Responsible ADCS *	<input type="text" value="sue.fredson"/>	

To add a name to any of these fields:

- Click on the button to the right of the field.

The screenshot shows the 'Select User' dialog box with the search criteria set to 'User Last Name' that starts with 'Rawson'. The 'Find' button is visible.

- Type the last name of the user in the right hand field and click on the **Find** button.

Actions	Type	Name	Last Name	Department
Select >		sue.rawson	Rawson	Implementers

- Click on **Select >** to the left of the appropriate user.

Service User Recording

Service User Recording

All service users are recorded on Content Server *

All service users are recorded on an external system *

All service users are recorded on Content Server: In order to identify where data about service users is stored there are two new fields on the service information form to be completed. Answer both questions. These questions refer to any identifiable service user data, including name, address, dob, demographic data, referrals, contact recording, attendance data.

If all service users have a case file in content server answer **Yes**.

If all service users do not have a case file in content server answer **No**, even if some do.

All service users are recorded on an external system: An external system will include Maytas and Charms as well as data bases such as Cold


Harbour used by Barnardo's as well as the systems of external bodies such as commissioners or partners.

If all service users have data is recorded on external systems answer **Yes**, even if there is data also held on Content server.

If not all service users have data recorded on external systems answer **No**

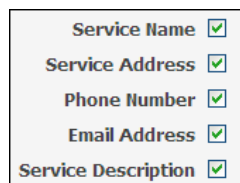
Service Regulator and Service Regulation fields



If your service is subject to regulation you can choose a regulator and regulation from these drop-down lists. You can add multiple values to either of these fields if needed by clicking on the appropriate  button.


Website Visibility Fields

These fields control what information about the service is accessible from the main Barnardo's website.



These check-boxes control which of the pieces of information on the form are displayed on the Barnardo's website when someone searches for services in your area.



When someone searches for services by area on the main Barnardo's website, these postcodes will be used to determine whether your service should be included in the results. You can add multiple postcodes if needed by clicking on the  button.

Saving Your Changes

- After making any changes, click on the **Apply** button at the bottom of the form. You will not be able to save the changes until all mandatory fields are complete.

Note: If you do not do this your changes will not be saved.

Service Information Completion Guidance

Basic Details	
Service name	Enter the name of the service as agreed with the ADCS. If the work encompasses more than one service category a service information form needs to be completed for each and given a different name e.g. an ETS piece of work providing employment and training could have two service information forms for services called "Routes to Work Training" and "Routes to Work Employment".
Primary Category	Select from the pick list the service category agreed with the ADCS. This should not be changed without agreement of the ADCS. This is the primary purpose of the service.
Secondary Category	A secondary category or categories may be agreed with the ADCS after discussion with the MIO. This is to be used where a significant level of work is delivered which fits one or more service category but is not the primary purpose of the service. This provides important management information at an organisational level e.g. a family support service which provides parenting courses to as part of the work could have a secondary category of Parenting. Use the plus button if more than one Secondary category is needed.
Description	Enter a brief description of the work of the service which may be used internally or externally, it should be clear, concise and reviewed annually or whenever there is a service change.
Date opened	Enter the date the service is opened.
Date closed	Enter the date the service is closed.
Cost centre	Select the Cost Centre that is applicable to this Service. Use the plus button if more than one Cost Centre is needed.
Locality	Select from the pick list the locality that this Service is part of.

Address	Enter the address details using the 'Address lookup' function. If the service operates from more than one base use the address of the main administrative base.
Phone, fax, e mail	Enter the contact details. If the service operates from more than one base use the contact details of the main administrative base.
Website	If the service has a website enter the address.
Contact hours	Enter the days and times that the service may be contacted. If the service operates outside these times this information can be included in the service Description.
Responsible manager	Enter the name of the CSM with overall responsibility for the service using the browse facility. Only one name may be entered and if there is a job share for this post one of the managers should be nominated as the contact manager for the service.
1st Line Manager	Enter the name of the first line manager using the browse facility. If there is only one manager for the service enter the name of that person in the responsible manager and 1 st line manager fields.
Administrator	Enter the name of the administrator using the browse facility. Only one name may be entered and if there is a job share for this post one of the administrators should be nominated as the contact administrator for the service.
Responsible ADCS	Enter the name of the ADCS using the browse facility.
Previous service name	Enter any previous service name.
Service Regulators and Regulations	
Regulators and inspectors	If the service is subject to external inspection select the names of the appropriate regulatory body or inspectorate, select as many as apply.

Registration and Inspection category	If the service is subject to external inspection select the name/s of the appropriate registration and inspection categories, select as many as apply.
Website Visibility	
Service Name	Tick the box to enable this information to be visible on the website, this should be ticked unless there is a reason for the information being with withheld.
Service Address	Tick the box to enable this information to be visible on the website, this should be ticked unless there is a reason for the information being with withheld.
Phone Number	Tick the box to enable this information to be visible on the website, this should be ticked unless there is a reason for the information being with withheld.
Email Address	Tick the box to enable this information to be visible on the website, this should be ticked unless there is a reason for the information being with withheld.
Service Description	Tick the box to enable this information to be visible on the website, this should be ticked unless there is a reason for the information being with withheld.
Delivery Site Postcode	Enter the post codes of all of the sites that the service is delivered from, this should be completed unless there is a reason for the information being withheld.