

Contents

| Overview | . 1 |
|---|-----|
| Recording a Next of Kin living at the Same Address | . 1 |
| Recording a Next of Kin living at a Different Address | . 1 |
| Recording a Personal Contact with an Unknown Address | . 3 |

Overview

Next of Kin and other Personal Contacts for a Client can be recorded on the Demographic Details screen via the Personal Contacts hyperlink.

Recording a Next of Kin living at the Same Address

- Click Menu
- Click Quick menu
- Click Demographic Details
- Search for Client

The **Demographic Details** screen will display.

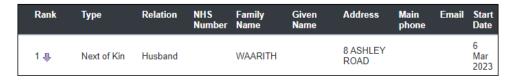
- Click Client Personal Contacts (bottom of the screen)
- Click Edit this Client (bottom of the screen)
- Click Add New Contact (bottom of the screen)

Record the details according to the information you have, ensuring that all mandatory fields are completed.

- Rank will autocomplete according to how many previous contacts there are
- Click Type drop-down and select Next of Kin
- Click Relation drop-down and select relation of Next of Kin to the Client (e.g., Husband/Wife/Son)
- Click in the Family Name field and enter the Family Name of the Next of Kin

Record any other information you may have in the appropriate fields.

- Click the Client Address button Client Address as the Next of Kin lives with the Client
- Enter Start Date
- Click Save to local and national
- Click Yes to the Information prompt 'Saving changes will update the Spine. Continue with save?'







Recording a Next of Kin living at a Different Address

- Click Menu
- Click Quick menu
- Click Demographic Details
- Search for Client

The **Demographic Details** screen will display.

- Click Client Personal Contacts (bottom of the screen)
- Click **Edit this Client** (bottom of the screen)
- Click Add New Contact (bottom of the screen)

Complete the details according to the information you have ensuring that all mandatory fields are recorded.

- Rank will autocomplete according to how many previous contacts there are
- Click Type drop-down and select Next of Kin
- Click Relation drop-down and select relation of Next of Kin to the Client (e.g., Husband/Wife/Son)
- Click Family Name and enter Family Name of the Next of Kin

Record any other information you may have in the appropriate fields.

- Enter the Postcode or 1st Line of Address into the Address Field
- Select Correct Address from Dropdown
- Enter Start Date
- Click Save to local and national
- Click Yes to the Information prompt 'Saving changes will update the Spine. Continue with save?



Recording a Personal Contact with an Unknown Address

A Personal Contact is any person that may need to be contacted regarding the Client. In this example, the Client's Social Worker is being added as a Personal Contact.

- Click Menu
- Click Quick menu
- Click Demographic Details
- Search for Client

The **Demographic Details** screen will display.

- Click <u>Client Personal Contacts</u> (located at the bottom of the screen)
- Click Add New Contact

Complete the details according to the information you have, ensuring that all mandatory fields are recorded.

- · Rank will autocomplete according to how many previous contacts there are
- Click Type drop-down and select Social Worker
- Click Relation drop-down and select Other
- Click Family Name and enter Team Name of the Social Worker

Record any other information you may have in the appropriate fields.



The next field to complete is the address of the Social Worker. The Post Code is mandatory so an address must be added in order to complete the screen.

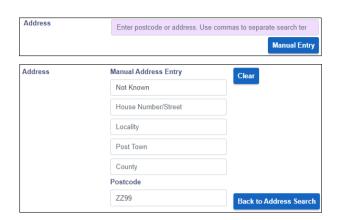




If you don't have an address for the Social Worker's team, you can use a generic code of **ZZ99** to record an **Unknown Address**. This is done by **Manual Entry**.

- Click Manual Entry Button (on the right)
- Type Not Known in the House or Building name field
- Type ZZ99 into the Post Code field

The address is now entered with the Not Known (ZZ99) postcode. Continue to complete the other contact information for the Social Worker.



- Click Main Phone Method drop-down and select required method
- Click Main Phone Context drop-down and select required method
- Click Main Phone and enter the phone number
- Complete the other fields (if required)
- Complete all mandatory fields (highlighted in pink)
- Enter Start Date (mandatory)
- Click Save local and national
- Click Yes to the Information prompt 'Saving changes will update the Spine. Continue with save?



