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 needed

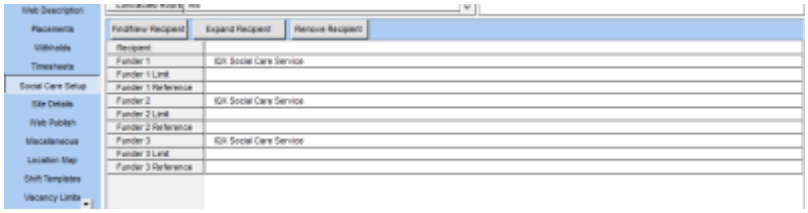
Care Recipient: A Person Record with name and address, etc of state ‘Care Recipient’
Care Contact: A Person Record with name and address, etc of state ‘Care Contact’

Company Records needed

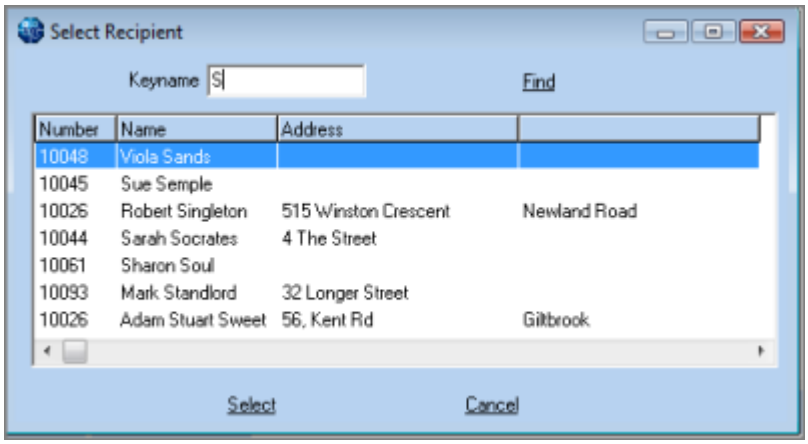
Funder: A Client Record with name and address, etc and Account Code, of state ‘Funder’

Vacancies

These will have a Social Care View, below Timesheets

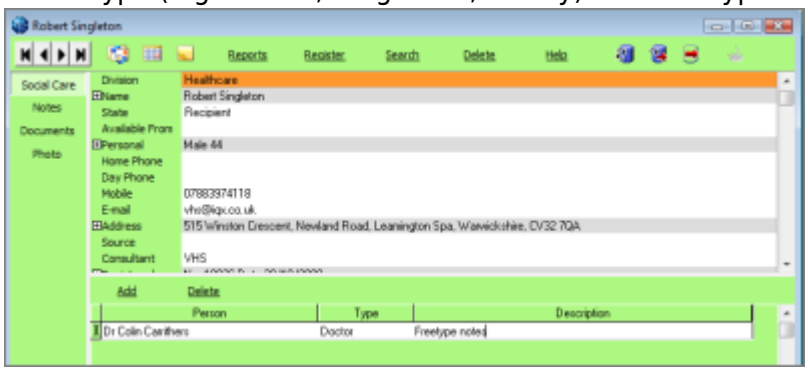


To add the recipient press the Find/New Recipient button. Either search for a recipient by keyname, highlight and press Select or press the New button to create a new recipient.



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.



From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=sa_maintenance_19&rev=1718625192

Last update: **2024/06/17 11:53**