

Social Care Payments – Non-Res - Income Max

Entering Financial Assessment on Swift

Background

This guidance notes details the process of entering the financial assessment for care at home services on Swift along with sending letters/email chasing up any evidence need and the outcome letter. It also details the process of informing Health and Social Care billing team where required.

Where a care @home service has been added to swift or a client disagrees with their current financial assessment and their assessed weekly charge, a Financial Assessment Form is sent to them by email/post. This is also the case if a Direct Payment/Community Alarm/ISF wishes to be assessed as well.

Once the form has been received completed with any evidence needed to confirm income/assets/ bank accounts, etc, the form can be processed to calculate this charge. On some occasions, clients may tick the alternative declaration at the end of the form advising that they are not going to disclose their financial information – they are Willing to Pay.

If they do not return the form – in this case, there is a different process to follow – please see process Presumed Willing to Pay Assessment. 

If a client has a CTO, DS1500 (prognosis of 6/12 months or less to live – double check)/BASRiS form (Benefits Assessment under Special Rules in Scotland) - “Do Not Charge” F/A need to be processed on swift and IMT tracking note updated.

We can do backdated assessments going back five years.

Receipt of the financial assessment form

When the assessment is initially received – it must be recorded on Swift as an IMT Tracking note and the questionnaire updated.

- Click on New record – enter as below:

The screenshot shows the 'Notes' form in the Swift system. The top bar indicates the user is 'Case Worker' and the team is 'Cc Se Cluster Southern Team - KEY WORKER, Cc Se Cluster South'. A 'Find/New' button is in the top right. The 'Notes' tab is active, showing a list of notes on the left and a form on the right. The selected note is '07-AUG-2025 IMT Tracking'. The form fields are as follows:

Note Date/Type	Note Type	Due Date	Date
22-JUL-2025 Communication -	IMT Tracking		07-AUG-2025
07-AUG-2025 IMT Tracking			
22-JUL-2025 Communication -			
21-JUL-2025 Communication -			
03-JUN-2025 AWI - Guardians			
21-MAY-2025 Communication			
25-APR-2025 AWI - Guardian			
23-APR-2025 AWI - Guardian			
10-APR-2025 AWI - Guardian			

Form fields:

- Head Line: NON RES
- Note Details: 07/08/2025 - Financial circo change info received - SM
- Start Time: [Empty]
- End Time: [Empty]
- Outcome: IMT - Active
- Significant Event: ☐
- Creator: [Empty]
- Date: 07-AUG-2025

Buttons at the bottom: Print, Further Details, Copy, Attachments, < Back, Next >, Save.

- Click on further details and questionnaire.

The screenshot shows the 'Questionnaire' form in the Swift system. The top bar indicates the user is 'Key Responsibility' and the team is 'Cc Se Cluster Southern Team - KEY WORKER, Cc Se Cluster South'. The 'Notes' tab is active, showing the '07-AUG-2025 IMT Tracking' note. The 'Questionnaire' tab is active, showing the following form fields:

Visit Reason	Outcome	Clear Reas/Outc

Location: [Empty] Search Address: [Empty] Clear Address: [Empty]

Person(s) Visited	Comments	Wkr	Seen Alone	Copy Note
		☐	☐	☐
		☐	☐	☐

Person(s) Undertaking Visit	Comments	Wkr
		☐
		☐

Buttons at the bottom: Print, < Back, Next >, Save.

- In the questionnaire – click on financial assessment – scroll down to code 60 and enter the date the form was received

Key Responsibility: Cc Se Cluster Southern Team - KEY WORKER, Cc Se Cluster South

Note Type/Date: IMT Tracking 07-AUG-2025

Notes Visit Details **Questionnaire** Actions

Heading: Financial Assessment

Benefit Check - Non Chargeable

Benefit Claim

Benefit Claim Appeal

Code	Question	List Answer	Answer
20	Reminder Letter Sent Date	T	
30	Assume Full Charge Date	T	
60	Financial Assessment Form Received Date	T	

Print < Back Next > Save

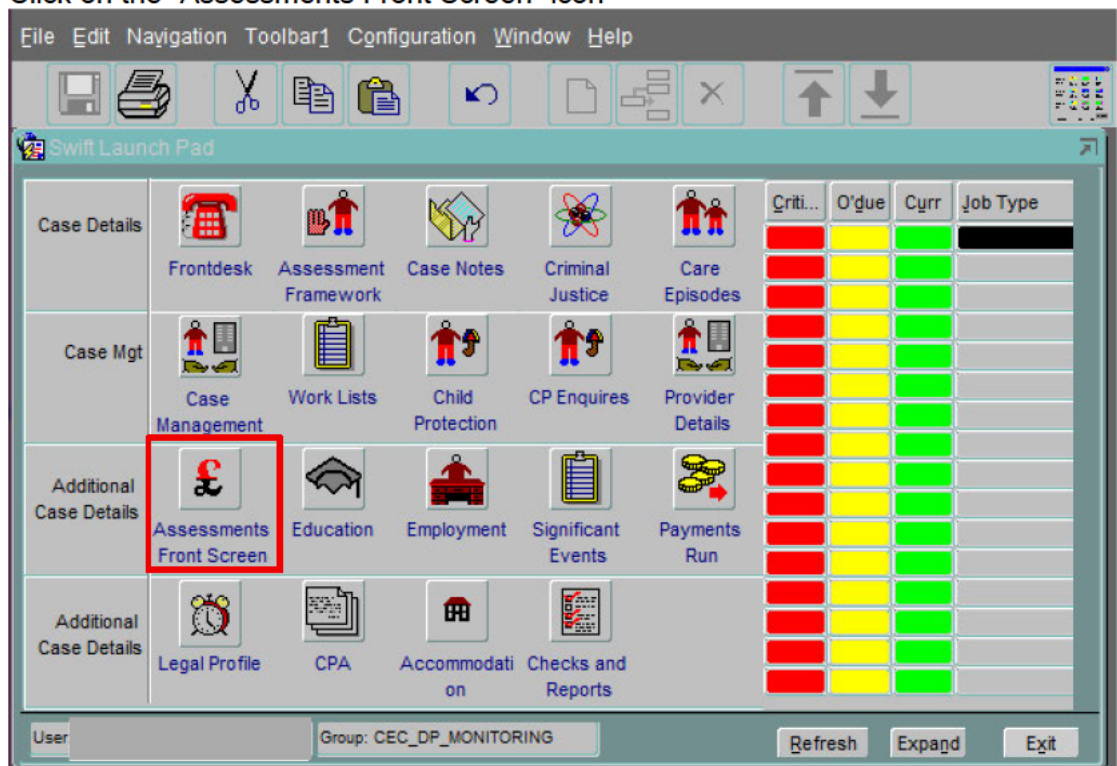
This data is used as part of the reminders report process to determine if a reminder is required or not so must be completed.

Entering the assessment on Swift

- Open Swift – enter your username, password, and database = swlive.



- Click on the “Assessments Front Screen” icon



- Select the “Assessments” tab. Use the ‘Find/New’ button to select the appropriate client.

The screenshot shows the 'Assessments for' window. At the top, there are fields for 'Person's Details', 'Key Responsibility', 'Date of Birth', 'Age', and 'Client Category'. A 'Find/New' button is highlighted in red. Below these fields is a tabbed interface with 'Assess' selected and highlighted in red. Other tabs include 'L/Pad', 'Provisi', 'Involve', 'Temp A', 'Properl', 'Agreer', 'Mobile', and 'Mob Hi'. The main area contains a list of assessment records on the left and a form for entering details on the right. The form includes fields for 'Effective From / Completion Date', 'Effective From', 'Effective To', 'Assessment Type', 'Reason', 'Assessor/Team', 'Visiting Officer', 'Visit Date', 'Agreement', 'Calculated Date/By', 'Completed Date/By', and 'Tracking Ref No'. There is also a 'Disability Premium' section with radio buttons for 'Status' (Actioned, Complete, Provisional, Rejected). At the bottom, there are 'Print', '< Back', 'Next >', and 'Save' buttons.

- Enter the swift number/information you have and click on ‘Next’ then when you have the correct client – click on that line and select ‘Finish.’

The screenshot shows the 'Person Search Criteria' window. It has a menu bar with 'File', 'Edit', 'Toolbar1', 'Configuration', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains a form for searching for a client. The 'Identifier' field is highlighted in red. Other fields include 'Surname', 'First Names', 'Approx/Act DOB', 'Age In Years', 'Gender', 'Referral Range : From', 'To', 'Search Remote', 'Premise Name', 'Premise Number', 'Town', 'Ad.Area/County', 'Team', 'Class.', 'Client Cat.', 'Client Security', 'Client SS?', 'SP?', 'Worker?', 'Oth. Ref. Type', 'ID', 'Sec Name', 'Street', 'Locality', and 'Postcode'. At the bottom, there are 'Complex Find', 'Next >' (highlighted in red), and 'Cancel' buttons.

File Edit Toolbar1 Configuration Window Help

Results - Fulfilling Find Criteria

Name	ID	Age	Date Of Birth	Address / Team	SP	SC	W	R	SR	AliasReg

Print < Back **Finish >** Cancel

Then: -

- Click on the “New Record” button or a blank row below any existing assessments.

File Edit Navigation Toolbar1 Configuration Window Help ORA

Assessments for

Person's Details

Key Responsibility

Date of Birth Age Client Category Older People with Support Needs Find/New

L/Pad **Asses** Provisi Involve Temp A Propert Agreer Mobile Mob Ha

Effective From / Completion Date

23-APR-2025 / 05-MAY-2025		
14-AUG-2024 / 24-FEB-2025		

Effective From Effective To

Assessment Type

Reason

Assessor/Team

Visiting Officer

Visit Date Select for Mobile

Agreement

Calculated Date/By

Completed Date/By

Tracking Ref No

Disability Premium

Status

☐ Actioned
☐ Complete
☒ Provisional
☐ Rejected

Print Further Details < Back Next > **Save**

- Enter the “Effective From” date (refer to guidance note)
- If the assessment is only provisional, this should not be saved and deleted once the result is calculated.
- Enter the “Assess Type” (Non-residential singles or non-residential couples)
- Enter the “Reason” – ‘No income maximisation required’
- Save Record (The name of the assessor who is logged in will appear in the “Assessor/Team” field)

Then click on Further Details - the screen will display the following. On the ‘More’ tab – tick the validated box:

The screenshot shows a software window titled "Assessment - Related Finances for". The interface includes a menu bar (File, Edit, Navigation, Toolbar1, Configuration, Window, Help) and a toolbar with various icons. The main form area has the following fields and controls:

- Client:** A text input field.
- Assessment Type:** A dropdown menu showing "Non-Residential Singles".
- Effective From:** A date input field showing "06-MAY-2025".
- Effective To:** A date input field.
- Completion Date:** A date input field.
- Assessment Type:** A dropdown menu showing "No Income Maximisation Required".
- Tabs:** A series of tabs at the bottom: (N), Asses, More, Summa, **Income** (highlighted with a red box), Benefit, Allowa, Capital, Proper, and Agree.
- Form Fields:**
 - ☐ Validated (checked)
 - ☐ Maximum Charge Offer
 - ☐ Non Disclosure
 - ☐ ICA Paid to Another Person
 - ☐ Welfare Benefits Check
 - ☐ Partner Entitled to SDP
 - ☐ Do Not Charge
 - ☐ Client Entitled to SDP
 - ☐ Client Entitled to EDP
 - ☐ Partner Entitled to EDP
 - ☐ Calculated on Mobile
 - Date:** A date input field.
 - By:** A text input field.
 - Reason:** A text input field.
 - Notes:** A text input field.
 - DRE Allowance %:** A percentage input field.
 - No of Dependents:** A numeric input field.
- Buttons:** Print, < Back, Next >, and Save.

and go to the “Income” tab and complete the following fields as available: -

Assessment - Related Finances for

Client: []

Assessment Type: Non-Residential Singles No Income Maximisation Required

Effective From: 06-MAY-2025 Effective To: [] Completion Date: []

Asses: More Summa **Income** Benefit Allowa Capital Properl Agree

Income Type

Income Type: [] GC Disregard: []

Amount: [] SC Disregard: []

Frequency: [] Paid By: [] Ref.: []

Disregard: []

Finance Related To

☒ Client ☐ Spouse/Dependant

☐ Checked Date: [] By: []

Evidence: [] Notes: []

Print < Back Next > Save

- Select "Income Type" from the drop-down list.
- Enter the "Amount" – is the weekly amount.
- Enter the organisation providing the income in "Paid By" if available.
- Enter any "Disregard" as a weekly amount (if applicable - this may drop in automatically if a standard disregard has been set up)
- Click on the radio button to indicate whether the income relates to Client or Spouse/Dependant (this defaults as Client)
- Click on the "Checked" box – if checked on NEC Revs/Bens or Searchlight
- Enter the "Date"
- Enter who this has been checked by in the "By" field.
- Enter how this has been evidenced in the "Evidence" field.
- If the "Other Income" income type has been selected, then also record the type of income in the "Notes" field.
- Save Record - Example is below:

Assessment - Related Finances for [Redacted]

Client [Redacted]

Assessment Type: Non-Residential Singles | No Income Maximisation Required

Effective From: 06-MAY-2025 | Effective To: [Redacted] | Completion Date: [Redacted]

Asses: More Summa **Income** Benefit Allowa Capital Properl Agree

Income Type

Income Type	Amount	Frequency	Disregard	GC Disregard	SC Disregard	Paid By	Ref.
Superannuation/Occupational P	250.00	Weekly(days)		0.00	0.00		

Income Type: Superannuation/Occupa

Amount: 250.00

Frequency: Weekly(days)

Disregard: [Redacted]

GC Disregard: 0.00

SC Disregard: 0.00

Paid By: [Redacted] Ref.: [Redacted]

Finance Related To: ☒ Client ☐ Spouse/Dependant

☐ Checked Date: [Redacted] By: [Redacted]

Evidence: [Redacted] Notes: [Redacted]

Print < Back Next > Save

Repeat as above for all Income Types

Then click on the Benefits tab and complete the following fields as available: -

The screenshot shows the 'Assessment - Related Finances for' window. The 'Benefit' tab is active. The 'Benefit Type' dropdown is set to 'PIP Daily Living Enhanced'. The 'Amount' field contains '110.40' and the 'Disregard' field contains '36.50'. The 'Finance Related To' section has 'Client' selected. The 'Checked' checkbox is unchecked. The 'Date', 'By', 'Evidence', and 'Notes' fields are empty. The 'Save' button at the bottom right is highlighted with a red box.

- Select the “Benefit Type” from the drop-down list.
- Click on the “Amount” field and the standard amount drops in automatically. Overwrite this amount if incorrect.
- Enter a “Disregard” if appropriate as a weekly amount, e.g. for Child Benefit and Child Tax Credit (this may drop in automatically if a standard disregard has been set up)
- Click on the radio button to indicate whether the benefit relates to Client or Spouse/Dependant (this defaults as Client)
- Click on the “Checked” box – only if NEC Revs/Bens or Searchlight has been checked.
- Enter the “Date”
- Enter who this has been checked by in the “By” field.
- Enter how this has been evidenced in the “Evidence” field – i.e. searchlight, NEC Revs and Bens, bank statements, benefit award letters.
- If the “Other Benefit” benefit type has been selected, then also record the type of benefit in the “Notes” field.
- Save Record

***** **NB:** If a client has Housing Benefit – there is no need to put this onto Swift. If on Universal Credit the housing element is disregarded..

Then click on the Allowance tab to record outgoing and complete the following fields as available: -

Assessment - Related Finances for: [Client Name]

Client: [Client Name]

Assessment Type: Non-Residential Singles No Income Maximisation Required

Effective From: 06-MAY-2025 Effective To: [Date] Completion Date: [Date]

Asses! More Summa Income Benefit **Allowance** Capital Property Agree

Allowance Type

CAS alarm/telecare

Personal Allowance Singles

Life Insurance

Rent

Allowance Type: CAS alarm/telecare

Amount: 6.71

Frequency: Weekly(days)

Disregard: [Field]

Paid To: [Field]

Payment Ref.: [Field]

Finance Related To

☒ Client ☐ Spouse/Dependant

☐ Checked Date: [Field] By: [Field]

Evidence: [Field] Notes: [Field]

Print < Back Next > **Save**

- Ensure that the Personal Allowance for Singles or Couples is on the assessment – if not add it first.
- Select the “Allowance Type” from a drop-down list.
- Enter the “Amount” (this may drop in automatically if a standard amount has been set up)
- Click on the radio button to indicate whether the allowance relates to Client or Spouse/Dependant (this defaults as Client)
- Click on the “Checked” box – only if NEC Revs/Bens or Searchlight has been checked.
- Enter the “Date”
- Enter who this has been checked by in the “By” field.
- Enter how this has been evidenced in the “Evidence” field.
- If the “Other Allowance” allowance type has been selected, then also record the type of allowance in the “Notes” field.
- Save Record
- Repeat as above for all Allowance Types
- For ILF there is always an allowance entered onto the financial assessment.
If the community alarm started before the Care at Home service, an allowance is entered.

Then click on the Capital tab to record capital and complete the following fields as available – this section is for bank accounts, savings, investments, etc: -

Assessment - Related Finances for [Client Name]

Client: [Client Name]
 Assessment Type: Non-Residential Singles
 No Income Maximisation Required
 Effective From: 06-MAY-2025
 Effective To: [Date]
 Completion Date: [Date]

Asses: More Summa Income Benefit Allowa **Capital** Properl Agreeer

Capital Type
 Bank Account
 Bank Account
 [Empty]
 [Empty]
 [Empty]
 [Empty]
 [Empty]
 [Empty]

Capital Type: Bank Account
 Value: 500.00
 Disregard: [Empty]
 Capital With: [Empty]
 No. of Units: [Empty]
 Maturity Date: [Empty]
 Ref.: [Empty]

Finance Related To
☒ Client
☐ Spouse/Dependant

☐ Checked
 Date: [Empty]
 By: [Empty]
 Evidence: [Empty]
 Notes: [Empty]

Print < Back Next > **Save**

- Select the "Capital Type" from the drop-down list.
- Enter the "No of Units" if applicable.
- Enter the "Value"
- Enter the "Maturity Date" if applicable.
- Enter the organisation in "Capital With" field.
- Click on the radio button to indicate whether the capital relates to Client or Spouse/Dependant
- Click on the "Checked" box – if NEC Revs/Bens or Searchlight has been checked.
- Enter the "Date"
- Enter who this has been checked by in the "By" field.
- Enter how this has been evidenced in the "Evidence" field.
- If the "Other Capital" capital type has been selected, then also record the type of capital in the "Notes" field.
- Save Record
- Repeat for all Capital Types. If doing assessment for previous years, we would request bank statements, leave assessment as provisional until these are returned.

If the details of a second property need to be recorded return to the “Assessments” tab and click on the “Properties” tab: -

The screenshot shows a software window titled "Assessments for:". At the top, there are fields for "Person's Details", "Key Responsibility", "Date of Birth" (08-MAY-1966), "Age" (a dropdown menu), and "Client Category" (Older People with Support Needs). A "Find/New" button is on the right. Below this is a tabbed interface with tabs: "LPad", "Asses:", "Provisi", "Involve", "Temp A", "Propert" (selected), "Agreer", "Mobile", and "Mob Hi". The "Propert" tab is active, showing a "Property" list on the left and a form on the right. The form includes fields for "Search Address" or "Free Text", "Valuation" (highlighted with a purple box), "Date Valued", "How Valued", "Date Sold", "Sale Value", "Value of Claim", "% Claim", "Disregard", "Mortgage Outstg", "Net Proceeds", "Accrued Debt", "Main", "Disregard Date", "Charge", "Charge Pending", "No Charge", "Caution", "Caution Pending", "Ignore Property", "Yes", "No", "Unknown", "Ignore Rsn", "Property In Uk", "Yes", "No", "Unknown", "Agreement", and "Notes". At the bottom, there are "Print", "Further Details", "< Back", "Next >", and "Save" (highlighted with a red box) buttons.

- Enter the “Valuation”
- Save Record

Navigate back to 'Assessment' tab and click on 'Further details'.

Assessments for [Client Name]

Person's Details [Redacted]
 Key Responsibility [Redacted]
 Date of Birth 08-MAY-1966 Age 1 Client Category Older People with Support Needs Find/New

Asses (selected) Provisi Involve Temp A Propert Agreeer Mobile Mob Hi

Effective From / Completion Date
 06-MAY-2025
 23-APR-2025 / 05-MAY-2025
 14-AUG-2024 / 24-FEB-2025

Effective From 06-MAY-2025 Effective To [Redacted]
 Assessment Type Non-Residential Singles
 Reason No Income Maximisation Required
 Assessor/Team [Redacted] - Co Funding Indeg
 Visiting Officer [Redacted]
 Visit Date [Redacted] Select for Mobile
 Agreement [Redacted]
 Calculated Date/By [Redacted]
 Completed Date/By [Redacted]
 Tracking Ref No [Redacted]

Disability Premium
 Status
☐ Actioned
☐ Complete
☒ Provisional
☐ Rejected

Print Further Details < Back Next > Save

Then click on the "Summary" tab: -

Assessment - Related Finances for [Client Name]

Client [Redacted]
 Assessment Type Non-Residential Singles No Income Maximisation Required
 Effective From 06-MAY-2025 Effective To [Redacted] Completion Date [Redacted]

Asses More (selected) Summa Income Benefit Allowa Capital Propert Agreeer

Capital	Gross	Disreg	Net	Allowances	Net	Income	Gross	Disreg	Net
Bank Acco	500.00	0.00	500.00	CAS alarm	6.71	PIP Daily Li	110.40	36.50	73.90
Bank Acco	500.00	0.00	500.00	Rent	16.11	PIP Mobility	77.05	77.05	0.00
				Life Insura	10.00	Employer	240.55	0.00	240.55
				Personal A	284.00	Superannu	250.00	0.00	250.00
Total	000.00		000.00	Total	316.82	Total	678.00	113.55	564.45

Tariff 0.00 0.00 0.00 NDI [Redacted] Amended NDI [Redacted] Max. Charge N

Print Further Details < Back Next > Save

- Click on the "Calc" button.

Assessment - Related Finances for: [Redacted]

Client: [Redacted]

Assessment Type: Non-Residential Singles No Income Maximisation Required

Effective From: 06-MAY-2025 Effective To: [Redacted] Completion Date: [Redacted]

Asses: More **Summa** Income Benefit Allowa Capital Properl Agreeer

Capital	Gross	Disreg	Net	Allowances	Net	Income	Gross	Disreg	Net
Bank Acco	500.00	0.00	500.00	CAS alarm	6.71	PIP Daily Li	110.40	36.50	73.90
Bank Acco	500.00	0.00	500.00	Rent	16.11	PIP Mobility	77.05	77.05	0.00
				Life Insura	10.00	Employmer	240.55	0.00	240.55
				Personal A	284.00	Superannu	250.00	0.00	250.00
				Income Sur	0.00				
Total	000.00		000.00	Total	316.82	Total	678.00	113.55	564.45
Tariff	0.00	0.00	0.00	NDI	247.63	Amended NDI	161.34	Max. Charge	N

Buttons: Print Further Details < Back Next > Save

- When 'Calc' is pressed and the Savings Credit/Guarantee credit is showing an amount under the Allowances column – check searchlight/NEC and amend the amount /0.00 as required.
- Return to the Summary tab and click on the "Calc" button again to calculate the client's charge. Swift will retain the amounts which have been overwritten.

You then need to click on the 'More' tab to validate the assessment before it can be completed. Tick the 'Validated' box then 'Save.' If you are new to the service – do not complete this step, your work will be checked by another staff member to ensure that the information is correct.

Assessment - Related Finances for: [Redacted]

Client: [Redacted]

Assessment Type: Non-Residential Singles No Income Maximisation Required

Effective From: 06-MAY-2025 Effective To: [Redacted] Completion Date: [Redacted]

Asses: **More** Summa Income Benefit Allowa Capital Properl Agreeer

☒ Validated

Date: [Redacted]

By: [Redacted]

☐ Do Not Charge

Reason: [Redacted]

☐ Calculated on Mobile

☐ Maximum Charge Offer

☐ Non Disclosure

☐ ICA Paid to Another Person

☐ Welfare Benefits Check

☐ Partner Entitled to SDP

DRE Allowance %: [Redacted]

No of Dependents: [Redacted]

☐ Client Entitled to SDP

☐ Client Entitled to EDP

☐ Partner Entitled to EDP

Notes: [Redacted]

Buttons: Print < Back Next > **Save**

Go back to the Summary tab and click on 'Comp' – you will get a pop-up box – just click on 'Next' then 'OK.'

Assessment - Related Finances for [redacted]

Client: [redacted]

Assessment Type: Non-Residential Singles | No Income Maximisation Required

Effective From: 06-MAY-2025 | Effective To: [redacted] | Completion Date: [redacted]

Asses: More **Summary** Income Benefit Allowa Capital Proper Agreeer

Capital	Gross	Disreg	Net
Bank Acco	500.00	0.00	500.00
Bank Acco	500.00	0.00	500.00
Total	1000.00		1000.00
Tariff	0.00	0.00	0.00

Allowances	Net
CAS alarm	6.71
Rent	16.11
Life Insura	10.00
Personal A	284.00
Income Suj	0.00
Total	316.82
NDI	247.63

Income	Gross	Disreg	Net
PIP Daily Li	110.40	36.50	73.90
PIP Mobility	77.05	77.05	0.00
Employer	240.55	0.00	240.55
Superannu	250.00	0.00	250.00
Total	678.00	113.55	564.45
Amended NDI	161.34		
Max. Charge	N		

Buttons: Reject, Calc, **Comp**, Copy

Buttons: Print, Further Details, < Back, Next >, Save

Once the assessment is complete, you need to notify the client, Health, and Social Care Billing team and Alarms/DP/ISF – depending on what services the client receives – there is further information on the guidance.

As far as possible use email through D360 to notify of weekly charge and when it is valid from. The standard template to use is in [G:\HSC\HSC-HQ\H&SC File Plan\Business Services\Income Maximisation \(Elaine\)\Templates](G:\HSC\HSC-HQ\H&SC File Plan\Business Services\Income Maximisation (Elaine)\Templates) and the files are labelled FA outcome – full charge, etc, depending on the outcome. Ensure the outcome letter is also copied into the case notes in Swift. If email is unavailable and there is no support worker named to send the outcome letter to – it can be sent by post.

To do this navigate back to the assessment tab, click on the 'N'

The screenshot shows a software interface titled 'Assessments for'. At the top, there are fields for 'Person's Details', 'Key Responsibility', 'Date of Birth' (08-MAY-1966), 'Age', and 'Client Category' (Older People with Support Needs). A 'Find/New' button is on the right. Below these fields is a tabbed interface with tabs: 'N' (highlighted with a red box), 'L/Pad', 'Asses' (highlighted with a red box), 'Provisi', 'Involve', 'Temp A', 'Propert', 'Agreer', 'Mobile', and 'Mob Hi'. The 'Asses' tab is active, displaying a list of dates on the left and a form on the right. The list includes '06-MAY-2025', '23-APR-2025 / 05-MAY-2025', and '14-AUG-2024 / 24-FEB-2025'. The form fields include 'Effective From' (06-MAY-2025), 'Effective To', 'Assessment Type' (Non-Residential Singles), 'Reason' (No Income Maximisation Required), 'Assessor/Team', 'Visiting Officer', 'Visit Date', 'Agreement', 'Calculated Date/By' (16-JUN-2025), 'Completed Date/By', and 'Tracking Ref No'. There are also checkboxes for 'Disability Premium' and 'Status' (Actioned, Complete, Provisional, Rejected). At the bottom, there are 'Print', 'Further Details', '< Back', 'Next >', and 'Save' buttons.

Click on 'Case notes.'

The screenshot shows the same software interface, but now the 'N' tab is selected. The 'Asses' tab is no longer active. In the center of the screen, there are three icons: 'Assessmen Frontdesk Framework' (a person icon), 'Case Notes' (a notepad icon, highlighted with a red box), and another icon (a telephone icon). The 'Case Notes' icon is the one to be clicked according to the instruction. The bottom of the screen shows 'Print', '< Back', 'Next >', and 'Save' buttons.

You need to scroll down until you see an IMT Tracking note.

The screenshot shows a software interface titled 'Person Profile Notes for [redacted]'. It has tabs for 'Launch Pad' and 'Notes'. The 'Notes' tab is active, showing a list of notes on the left and a form for editing a note on the right. The note being edited is '20-MAR-2025 IMT Tracking'. The form fields include: Note Type (IMT Tracking), Due Date (empty), Date (20-MAR-2025), Head Line (Non Res), Note Details (20.03.25 - emailed Reminder to SW. PZ, 28/02/2025 - FA sent to [redacted] at her), Start Time (empty), End Time (empty), Outcome (IMT - Active), Significant Event (checkbox), Creator (empty), and Date (28-FEB-2025). At the bottom, there are buttons for Print, Further Details, Copy, Attachments, < Back, Next >, and Save. The 'Save' button is highlighted with a red box.

Update the 'Date' to today's date.

Headline – stays the same.

Click on 'Save.'

If you are entering any financial assessment – the outcome on the case note must be updated to IMT-Completed.

Also check the front desk screen to ensure that there are no missed contact details, financial contacts, email address, etc on Swift and update if necessary.

Notes

For the first couple months of the financial year, clients will be in touch because of the annual reassessment they have just had and have been notified of their new weekly charge and are not in agreement with it – effective from date will be the start of the financial year.

If we can't verify any benefits/capital, etc as they are not on any of our systems, phone the client or email them requesting the information to allow us to complete the assessment so that we can advise of the accurate weekly contribution towards their services. Do not enter the assessment onto swift.