HOW TO USE

ReDIAL

case management software

Simon Shaw

User Guide and Reference for

ReDIAL

case management software

Version 3.6

Simon Shaw

Bradsoft
P.O.Box 1000,
Shipley,
BD17 7YQ
West Yorkshire
Tel: 01274 588 440
Fax: 01274 588 506

Email: info@bradsoft.tele2.co.uk

Find us on the World Wide Web at www.bradsoft.co.uk

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1 Introduction

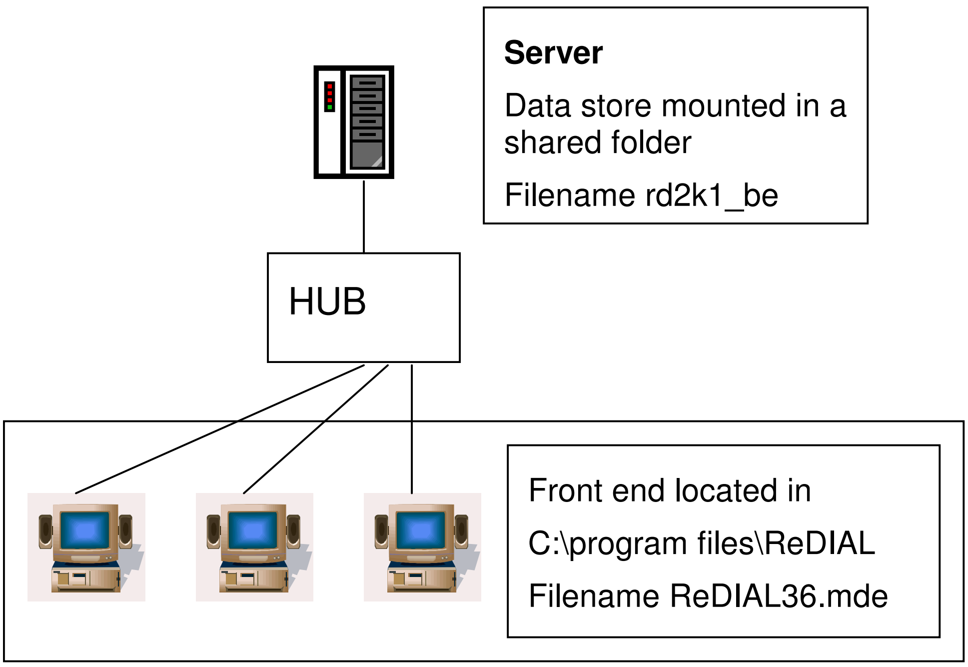
1.1 Overview

ReDIAL is a system based on a computer database that enables advice services to:

- Record advice given to clients
- Access a database of National and Local Organisations relevant to the casework that they undertake
- Analyse their casework and generate management information and statistics.

ReDIAL was conceived as system to support Disability Advice Services but it is highly configurable by the user and has been used by other advice services. ReDIAL has been designed to fulfil the requirements of the Community Legal Service for those agencies who are either franchise holders or who are holders of the Quality Mark for General Advice and Casework

ReDIAL may be run on a standalone PC or a computer network. When ReDIAL is to be run on a computer network the software is installed in two separate parts, a backend data store that would normally reside on a file server (it is best if this machine is not used by anyone) and a front end application that should be installed on all desktop machines in the office on which ReDIAL will be used.



2 Getting Started

2.1 Pre-requisites

2.1.1 MS Access

ReDIAL is an application that uses Microsoft Access 2000 or Access 2002 as its underlying database. Each of the desktop machines that need to run ReDIAL must have Microsoft Access installed. During the installation of ReDIAL, the installation program will check for the presence of Microsoft Access, if the machine does not have Access installed, the installation program will install Access for you. The limited version of Access installed by ReDIAL will NOT be available outside ReDIAL for you to use as a database for other purposes.

2.1.2 System Requirements

Hardware

ReDIAL will run on any Pentium PC, however, as the size of the Client and Organisation database grows a realistic minimum specification for a Windows 95 or 98 desktop machine is:

Processor:	Pentium 2, Celeron or AMD K2 266MHz
RAM	64Mbyte
Disc Space	2Gbyte

For later versions of the Windows operating system the minimum requirements are somewhat higher as the operating system itself requires more memory and space, so for Windows 2000 and XP, the minimum specification is:

Processor:	Pentium 2, Celeron or AMD K2 500MHz
RAM	128Mbyte
Disc Space	10Gbyte

For a Server PC serving several desktop computers a realistic specification is:

Processor:	Pentium 3 or 4 or AMD 1GHz
RAM	256Mbyte
Disc Space	20Gbyte

Screen Resolution

The ReDIAL user interface is designed for a minimum screen resolution of 800x600 pixels. At this resolution most screens will display without scroll bars being needed. A higher screen resolution than this will not cause any difficulties.

Software

ReDIAL will run on any of the Microsoft operating systems:

Windows 95, 98
Windows ME (not recommended)
Windows 2000 and 2000 pro
Windows XP and XP pro

In addition the backend data store will run on any of the Microsoft server operating systems.

Microsoft Access

ReDIAL requires Microsoft Access 2000 or 2002 to be installed on the desktop computers at which caseworkers and information officers will sit and use ReDIAL. If Access is not already installed, ReDIAL will install a 'run time' version of Access that will enable ReDIAL to run but will not be available for use as a standalone database. The run-time version of Access also provides less functionality than the fully licensed version of Access

The server computer does not require MS Access to be installed.

Computer Network

Where ReDIAL is to be installed on a computer network, it is recommended that a fast Ethernet network is installed based on 100MHz UTP connections. We strongly advise you to read the supporting information in Section 1.

2.2 Installation

2.2.1 Standalone Installation

Insert the ReDIAL Installation CD into your CDROM drive. Click on the link for 'standalone computer' choose the option to 'open file from current location', not 'save to disc' and follow the instructions on the screen. If the computer on which ReDIAL is being installed did not have Microsoft Access installed, the ReDIAL installation program will first install Access and then ask that you restart the computer to complete the installation of Access. Once the computer has been restarted, re-insert the ReDIAL CD and start the installation process again.

Once ReDIAL has been successfully installed you should start ReDIAL using the start button, then select programs and ReDIAL36

The first time that ReDIAL is started the program will ask you for 2 pieces of information that you will have been sent by Bradsoft. These are recorded for licensing purposes and to give your organisation a unique identifier when exchanging library data with another organisation.

1. Organisation User Name. E.g. DIAL East Suffolk

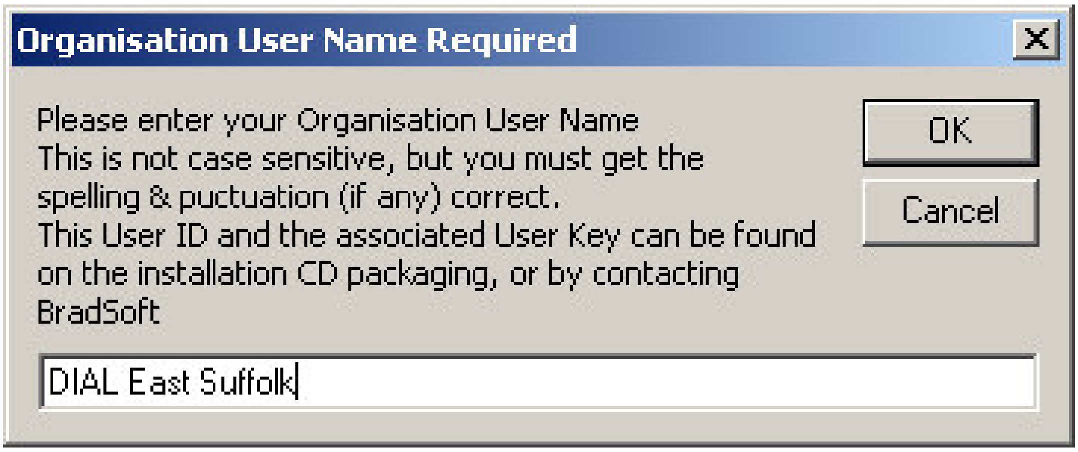


Figure 2-1 Entering Organisation Username

2. Organisation User Key. 16 letters and numbers, these are CASE SENSITIVE, so be careful, especially with the Caps lock key!

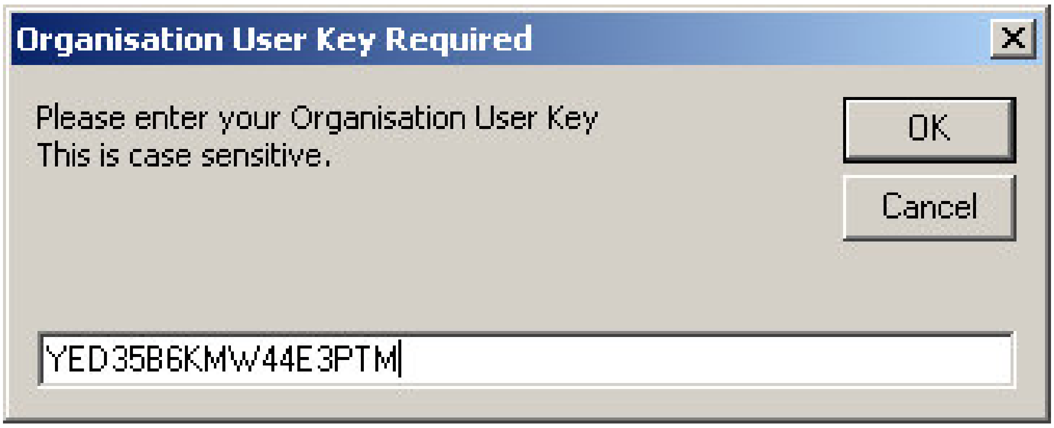


Figure 2-2 Entering Organisation user Key

Once these two pieces of information have been entered correctly, ReDIAL will need to associate the desktop application with the data storage file rd2k1_be. You will be asked to browse to the folder containing the rd2k1_be via the window shown in Figure 2-3

Once you have selected the folder containing the file rd2k1_be ReDIAL will connect its desktop application to the file rd2k1_be

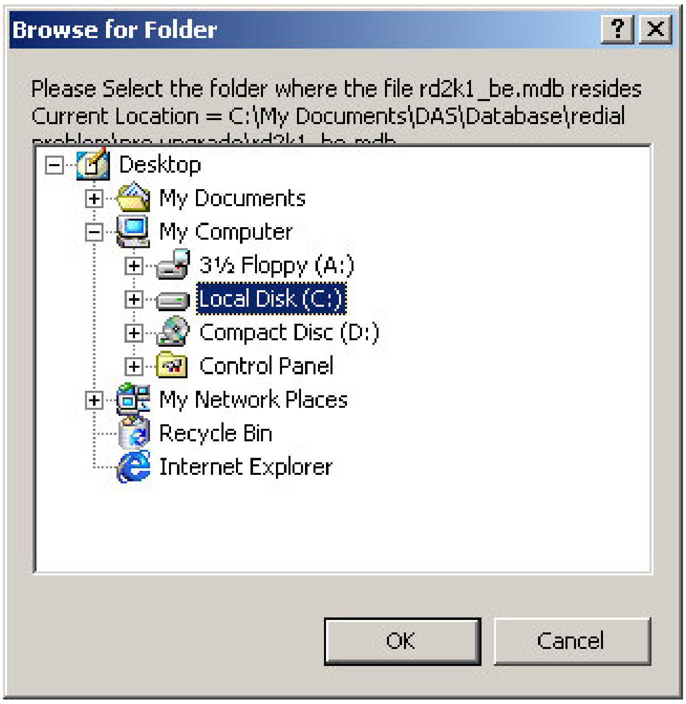
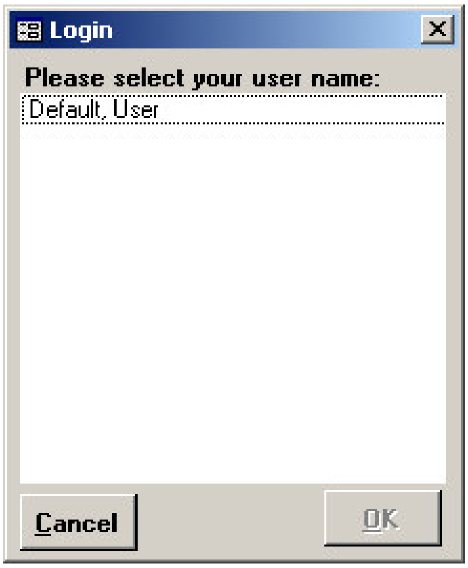


Figure 2-3 Browsing for the data file

ReDIAL will let you know if this operation has been successful by displaying this box:

Click OK and you will be taken to the ReDIAL login screen:



All ReDIAL systems ship with a username of Default User, the password for this account will have been sent to you by Bradsoft. Click on Default,User, then the OK button. You will be prompted for a password; enter this password which is NOT case sensitive and you will enter the ReDIAL system.

Congratulations! – you now have ReDIAL set up on your computer and you are ready to move on to Chapter 4 where you will learn how to configure the system.

2.2.2 Network Installation

Server

When installing ReDIAL on a computer network it is best to start with the server computer. Install ReDIAL following the instructions above for the standalone computer except that:

1. When prompted for the folder in which you wish to install ReDIAL, choose a shared folder on the Server where your other shared files are stored, but in a separate folder which you might choose to call ReDIAL.

   For example: ServerName\\SharedDrive\ReDIAL\

Tip: The default folder offered is C:\Program Files\ReDIAL – this is unlikely to be a shared folder on a server computer and you should change to another folder.

2. Once ReDIAL has been successfully installed, start it using start, programs, ReDIAL. You will then be prompted for your

   Organisation User Name
   Organisation User Key

When these have been successfully entered, ReDIAL will ask you to choose the location of the backend data store, named rd2k1_be, using the browser window shown below. When selecting the folder containing the folder rd2k1_be, always start at 'Entire Network' and follow the path down to the correct folder. By doing this you will create a version of the ReDIAL front end that can be copied to all your desktop machines without the need to repeatedly insert the Organisation User Name and User Key.

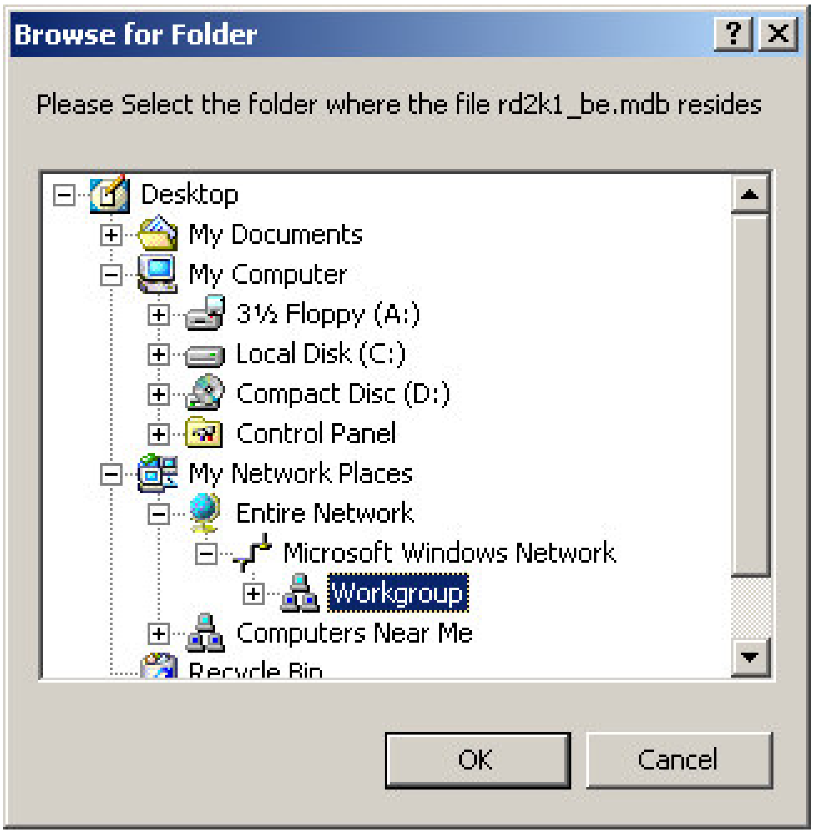


Figure 2-4

Once you have selected the folder containing the file rd2k1_be ReDIAL will connect its desktop application to the file rd2k1_be. ReDIAL will let you know if this operation has been successful by displaying this screen:

Figure 2-5 Data Tables Connected

Click OK and you will be taken to the ReDIAL login screen:

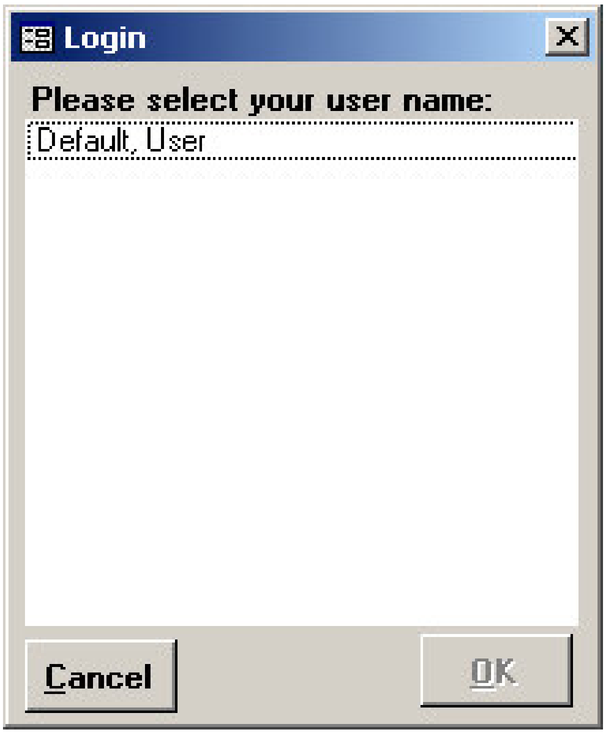


Figure 2-6 ReDIAL Login Screen

Congratulations! - you now have ReDIAL successfully installed on your server computer. If, however the operation was unsuccessful, ReDIAL will show this screen:

After clicking OK, the process of starting ReDIAL, entering the Organisation User Name and Organisation User Key, then browsing for the folder containing the file rd2k1_be must be repeated.

Tip –undertake this process at the server computer so that network problems can't interfere with your ReDIAL installation process. Check that ReDIAL runs OK on the server before installing on your desktop machines.

Desktop Workstations

Once Redial has been installed successfully on the server computer, it should be installed on each desktop workstation. This may be achieved by inserting the ReDIAL CD into each desktop computer, then selecting the ‘network installation’ option followed by ‘desktop workstation’. As before, choose the option to ‘Open file from current location’.

ReDIAL will prompt you for a folder in which to install the front end application; choose C:\Program Files where C is the local hard drive, then create a directory named ReDIAL36 below this and install ReDIAL there.

ReDIAL will also prompt you for a location of the menu item to start ReDIAL. If you accept the suggestion made by ReDIAL then you will be able to start ReDIAL by clicking start→programs→ReDIAL. Once the setup program has installed ReDIAL you can start ReDIAL. The first time that you start ReDIAL on each desktop computer you will be prompted for your:

Organisation User Name
Organisation User Key

Once these have been entered, ReDIAL will also prompt you for the folder containing the backend data store, located on your server PC. Browse to this folder as shown in Figure 2-4. ReDIAL should now connect the front end application to the data store on the server and give the message shown in Figure 2-5. You should now be logged into ReDIAL and ready to start configuring the system

The process of entering the Organisation user name and Key followed by browsing to the server folder containing the ReDIAL data store can be tedious if ReDIAL is to be installed on several desktop machines. To avoid this, follow the following procedure:

- make sure that ReDIAL is running OK on the server.
- After installation of the ReDIAL front end application on to the local hard drive, but before starting ReDIAL for the first time, copy the file ReDIAL36.mde from the shared folder on the server to the local disc, **overwriting** the file ReDIAL36.mde that the installation program has put there.
- The version that you have copied from the server will already contain the organisation Username and key and will also contain the path to the data store.

Now start ReDIAL using the Start menu, then Programs, then ReDIAL. You should immediately see the login screen, Figure 2-6

3 ReDIAL Overview

There a few key concepts that it is important to understand before you start to use ReDIAL, so please take a little time to read and understand this section of the user guide before you move on.

3.1 How Client Information is Stored in ReDIAL

In many paper based case records information about the progress of a clients claims and appeals are recorded in a single file in date order, or reverse date order. ReDIAL endeavours to collect information about a client in a more structured way at 3 levels:

Client details: **The Purple Screen**	This information identifies the client, their address and a small amount of unchanging information
Case Details: **The Green Screen**	A case is a major division of work with a client. A client may have more than one Case. Usually a separate case will be created for each benefit about which a client is being advised
Enquiries **The Grey Screen**	Each time contact is made with the client, or letters or phone calls are made on behalf of the client, a new enquiry is entered onto ReDIAL. The enquiry is entered against the Case about which the enquiry was made.

3.2 Client Information

Client information is identified on the screen with a purple background. This information, once entered, will tend to remain the same, though it will of course need to be changed should the client change their address or phone number. Should any of the information need to be changed just click in the field to be changed and enter the new text.

TIP: Where there is a pull down list, such as for the local area address field it is often better to use the pull down list rather than type the area yourself as:

It will avoid the possibility of spelling mistakes

Once the local area has been entered ReDIAL will associate the Town and County with the local area (see section 8.3), saving on typing

TIP: Enter the client's date of birth rather than their age group, as ReDIAL will calculate their age group for you. Dates of birth should be entered with a four digit year i.e 1960, not 60

3.3 Case Information

The concept of a Case is used in ReDIAL to add structure to the client records. A separate Case is required for each major area of work with a client. So, for example, in a Disability Advice Service, a client might have a Case for Disability Living Allowance with another Case for Incapacity Benefit if the client was unable to work. A third Case would be created for Housing Benefit and so on.

Of course the client may wish to discuss more than one case during a visit or phone call. In this situation, when recording the results of the visit or phone call, a caseworker would need to structure the case recording so that information related to each case was separated and recorded against the appropriate Case.

Each Case has information associated with it. The information is selected for display on the screen by a row of button at the top of the green screen, shown in Figure 3-1 Case Information

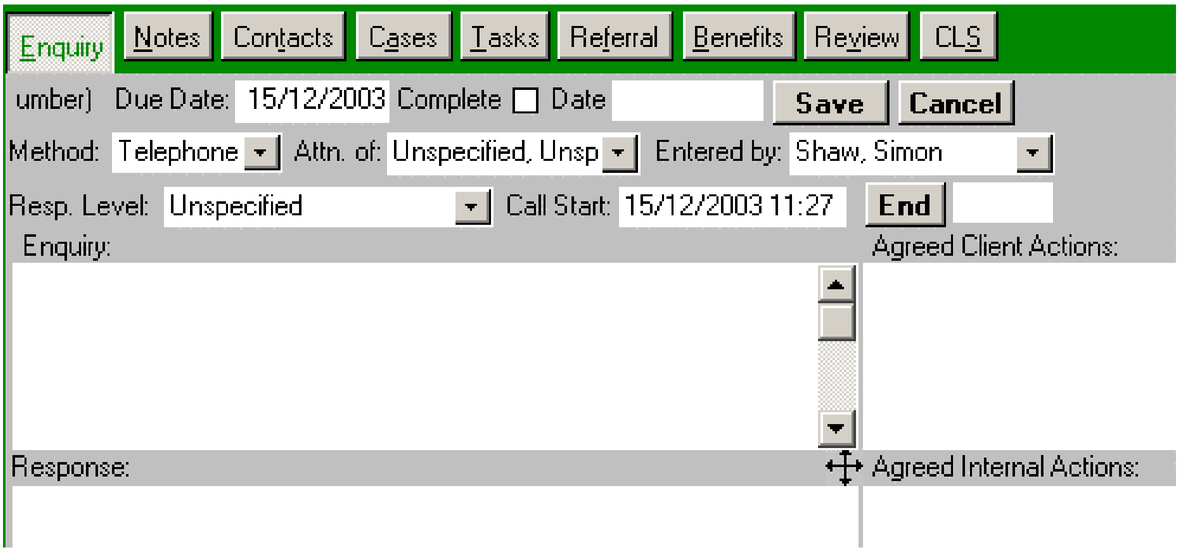


Figure 3-1 Case Information

The most important information is seen under the Enquiry button, shown selected in the figure. It is here that the results of contacts with the client are recorded. Other information is displayed by a single click on any of the buttons at the top of the green area of the screen. The details of the information recorded are described in Section 5.3.2 Case Level Buttons.

3.4 Enquiries

For a caseworker, the enquiry screen is the heart of ReDIAL as it is in this screen that the Caseworker will record conversations with the client. Enquiries are always related to a Case. In the example above, enquiries would be associated with either Disability Living Allowance or Incapacity Benefit.

An enquiry is created when:

- a client contacts the office, either by phone, letter or visit.
- another agency is contacted on behalf of the client
- a caseworker represents a client at a Tribunal.

Once again, ReDIAL tries to make it easy for the Caseworker to add structure to the enquiry by offering the Caseworker 4 boxes to complete for each enquiry, in addition to a variety of pull down lists.

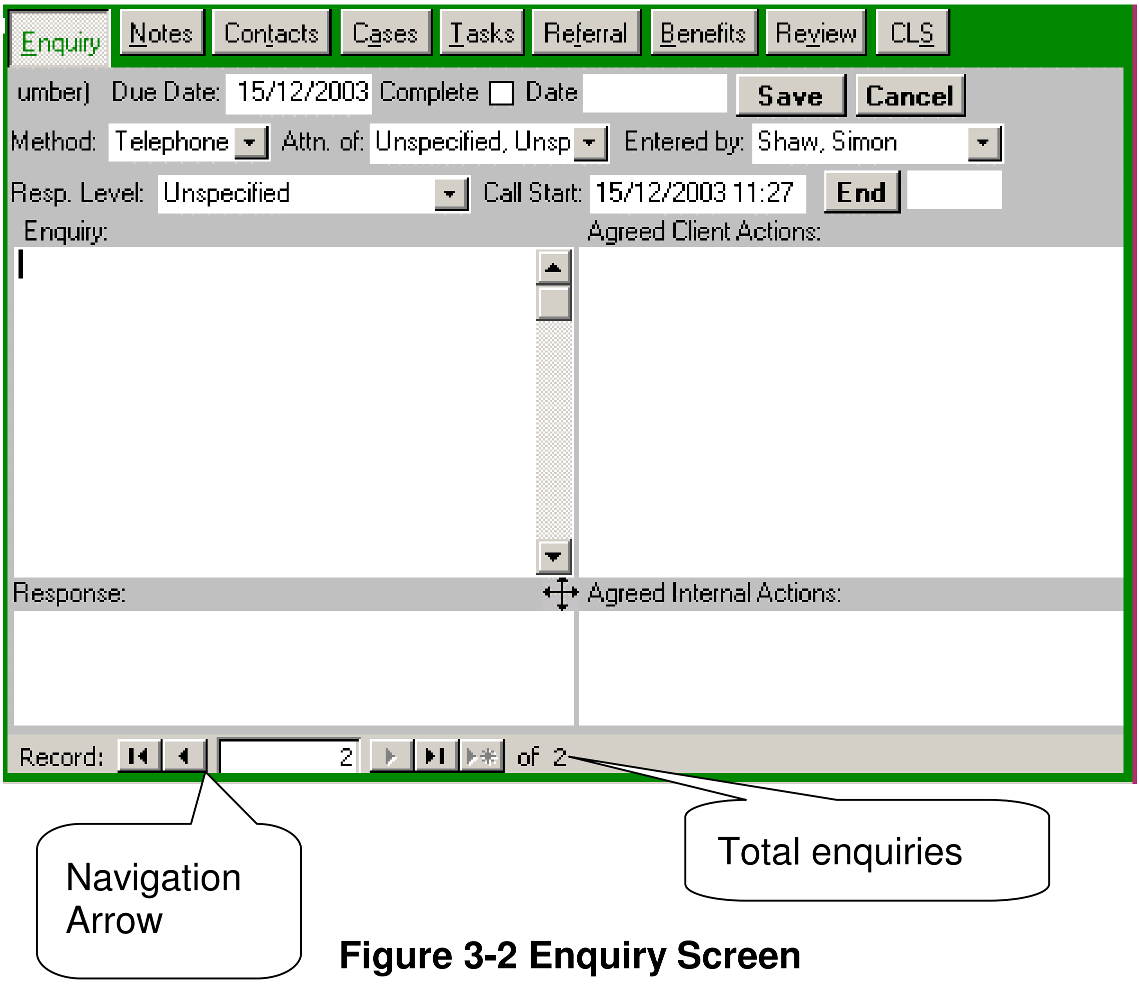


Figure 3-2 Enquiry Screen

In order to enter information into a box a caseworker should left click with the mouse, anywhere inside the box; the Caseworker may then type any text they want into the box. Scroll bars will appear at the side on the box when the text is larger than can be seen on the screen.

It is important that, when actions have been agreed with the client, they should be entered in the appropriate box, either as Client actions, such as ‘Client would visit their GP to obtain Medical Evidence’ or as internal actions such as ‘Caseworker to ring Benefits Agency to obtain DLA form for client’.

Navigation

When a case has several enquiries, a caseworker can navigate between enquiries by using the arrows at the bottom of the screen.

The right arrow will display the next older enquiry
The left arrow will display the next more recent enquiry to the next.
The right arrow with the bar will display the oldest enquiry
The left arrow and bar will display the most recent enquiry
The arrow plus * will create a new enquiry record, it has the same effect as clicking on the NEW button

Both Cases and Enquiries are numbered with the most recent enquiry number 1 and the oldest enquiry having the highest number. However, when a new case or enquiry is being entered into ReDIAL, it is given the next number in sequence. When the case or enquiry window is closed, ReDIAL then renumbers all cases or enquiries so that the enquiry just entered is given the number one, all older cases or enquiries are then renumbered upwards and the total number of enquiries will increase by one.

4 Getting Around ReDIAL

4.1 Moving around the screens

4.1.1 Tab/Shift Tab

As the system is based on Microsoft Access the cursor can be moved from one field to the next by using the TAB key. The cursor can be moved backwards through the fields by using SHIFT+TAB.

4.1.2 Mouse

The mouse can be used to move from field to field or to access menus in the usual way with a single mouse click.

4.1.3 ALT Key

The ReDIAL menus all have a letter underlined in their name, e.g. Clients. A menu can be activated by a mouse click or by using ALT plus the underlined letter in the menu in this case ALT+C. In many windows the buttons also have a letter underlined; if the ALT key is held down while the underlined letter is pressed on the keyboard, the effect is as if the button has been clicked with the mouse.

4.1.4 Short cut Keys

The shortcut keys that are used in Microsoft Office applications such as Word and Excel also function in the same way in ReDIAL so

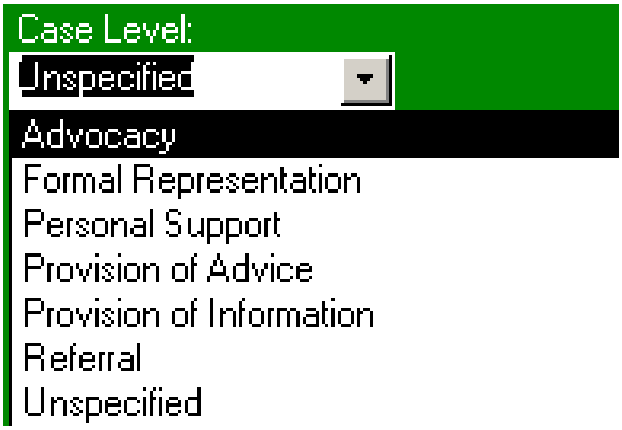
CTRL+X is Cut

CTRL+C is Copy

CTRL+V is paste

4.1.5 Pull down menus

Many fields have pull down menus, this is indicated by a down arrow button next to the field. A single click on the down arrow will cause a list to appear, scroll bars can be clicked to move up or down the list. A single click on an item in the list will select it. Where a list has many items then if the user starts to type into the window, the pull down menu will appear and display those items that start with the letters typed.



4.1.6 Closing/saving

Several windows within ReDIAL have a close button and also a save button within the window. If the close button is clicked before the save button, ReDIAL WILL save the information that you entered before closing the window.

Selecting a Case or Enquiry

A case or enquiry can be selected by a caseworker by using the arrow keys at the bottom on the green case screen or grey enquiry screen. These keys can also be used to step through the client list one by one, though this will be very laborious if there are many client details held.

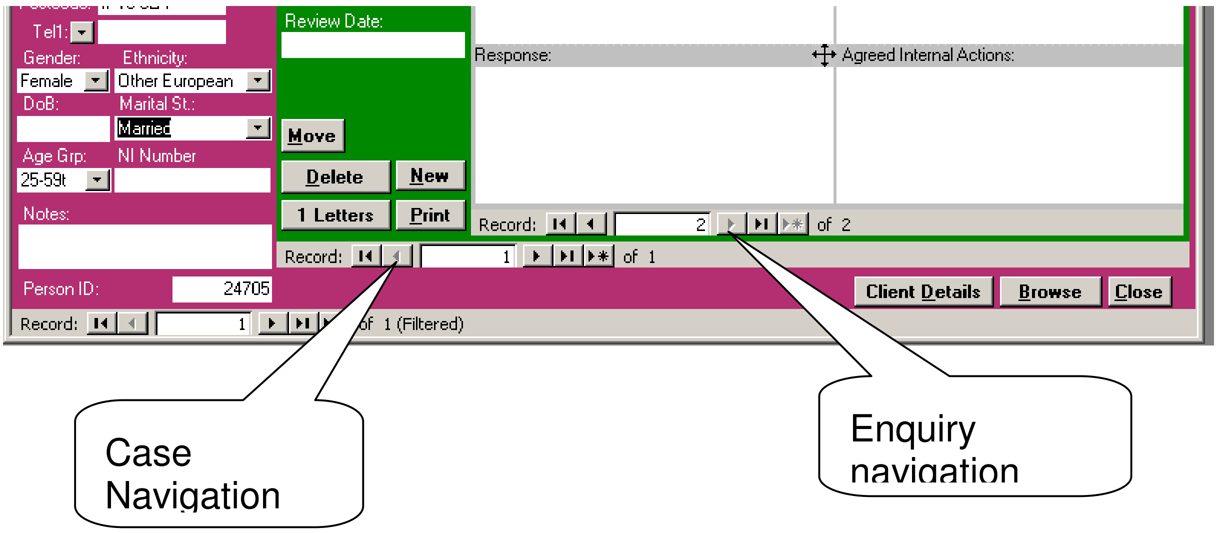
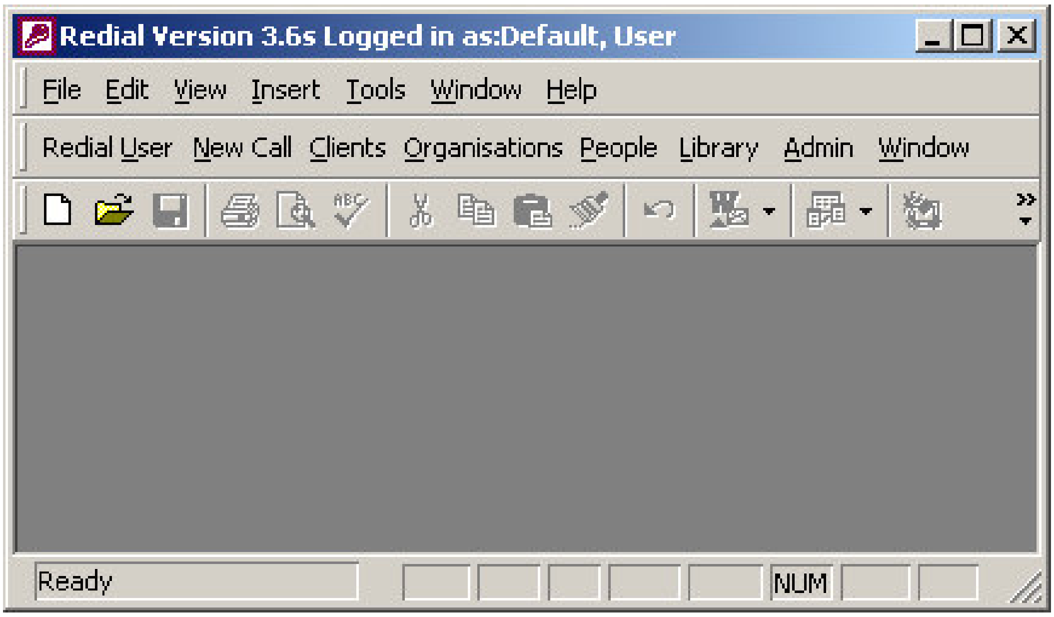


Figure 4-1 Case and Enquiry Navigation

4.2 Logging On

ReDIAL is started by clicking on start, then programs, then ReDIAL. Of course you can also set up a shortcut on the desktop to ReDIAL. First the ReDIAL banner box will appear, followed by the login window shown in Figure 2-6 ReDIAL Login Screen – Getting Started. Single click on a username then click OK . Enter the appropriate password and click OK again. Once a user has logged into ReDIAL then a series of additional menus will appear underneath the Microsoft Access menus as shown below.



In addition there may be another window shown, dependent on how the administrator has configured ReDIAL for the user. The Admin menu will not be present unless the user is a ReDIAL administrator. The next 8 sections of this user guide will describe what happens when each of the 8 menus from ReDIAL User to Window are selected.

4.3 ReDIAL User

The ReDIAL user menu enables each user to:

Logoff ReDIAL - leaves the Login screen available for another user to logon. It is good practice to use the Logoff menu item whenever you are away from your desk for more than a couple of minutes and definitely if the office is unoccupied. Remember – all the client details are visible should anyone care to look.

Exit ReDIAL - closes ReDIAL completely

Settings - enables the user to set their own preferences. Items that can be changed are:

Role – Each user of ReDIAL is given a role. This can be changed by the user but will have no impact on the functionality they will perceive.

Password – A user can change their password by typing the new password in the upper box, typing the same password in the lower box and clicking on ‘change password’. ReDIAL will prompt the user to enter their existing password before it will ask for confirmation that the change is to be made.

Passwords are **NOT** case sensitive

Toolbar Icons – The standard toolbar icons for print, cut and paste will be displayed if the user selects ‘text and icons’, they will not be displayed if the user were to select ‘text only’.

Startup form – This option enable the user to set which of the ReDIAL windows appears automatically on the screen immediately after they have logged on. Many caseworkers will choose ‘New Call’ or ‘Clients’; information officers may prefer ‘Organisations’.

4.4 New Call

The ‘New Call’ form is designed to be used to search the database when a caseworker or receptionist takes a call or receives a visit from a client. Once a caseworker has clicked the ‘New Call’ menu the ‘Check Clients’ form is displayed; this form enables the Caseworker to search the client database to see if the client has already had contact with the office.

The caseworker can search the database by typing into any of the boxes on the form. The text typed can either be a full name, address, phone number etc, or can be a part of the complete name or number. For example if a message has been received from someone called Shaw or Shore, the two letters ‘sh’ would be typed into the surname field. ReDIAL would retrieve all clients whose surname contained the string sh, including surnames such as Ashby where the ‘sh’ occurs in the middle of the name. The same techniques could be used if a client left a message with only their phone number, without the area code. Entering the phone number without the area code would find all clients with that phone number.

Only after the database has been searched will the ‘New’ button appear on the screen. ReDIAL has been designed in this way as occasionally clients will forget that they have visited or telephoned the office on a previous occasion. If their details were entered without a check to see if they were already in the client database then a caseworker might enter the client again, creating a duplicate record for the client. Duplicate records can be removed from the system, the 'move' button in the Case screen can be used to do this, see para. 5.3.1 Case Level Details

Once the client list has been searched, the Caseworker is presented with a list of possible matches. The Caseworker should use the surname, forename and the address/postcode to decide which is the appropriate client and click the button next to the client surname to display the client/enquiry screen for that client.

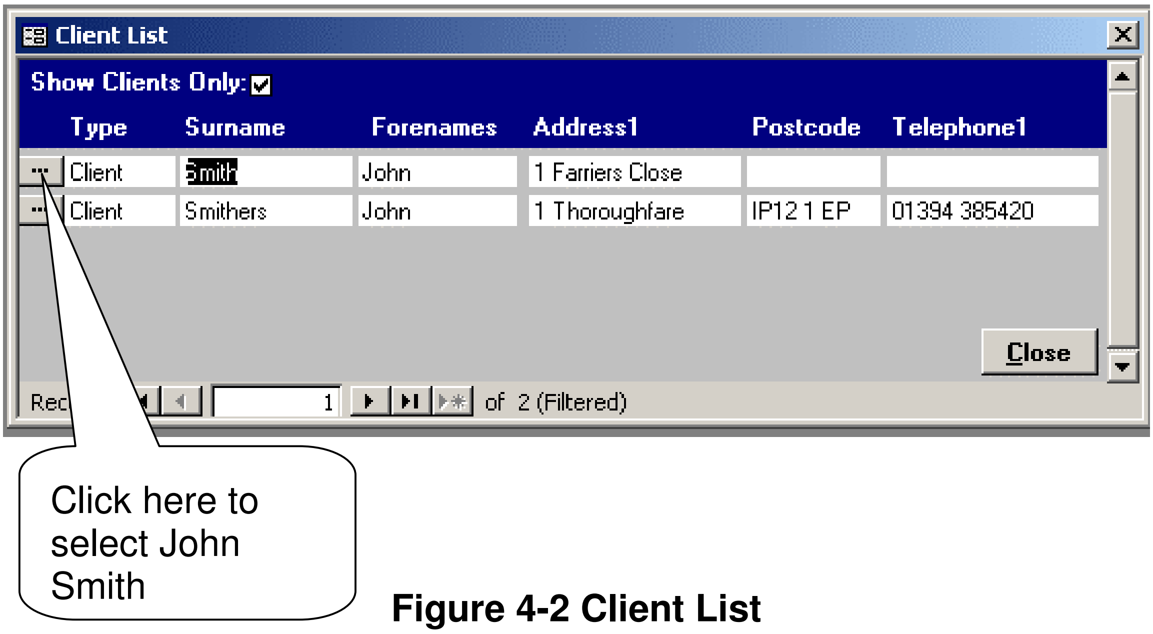
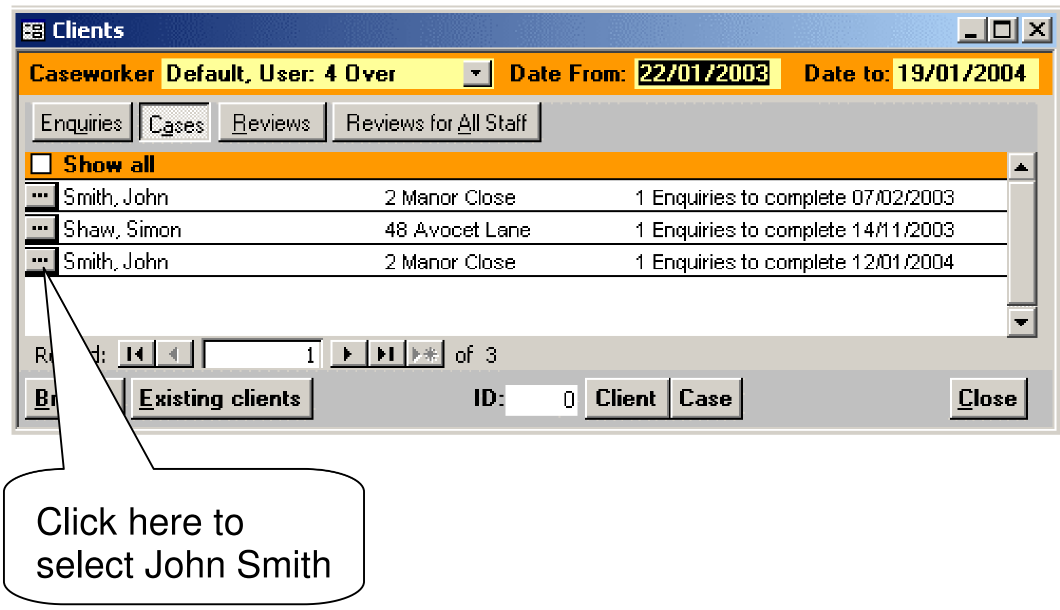


Figure 4-2 Client List

4.5 Clients

Should a caseworker wish to browse their clients and check for enquiries that need further work they can click on the 'Clients' menu which will cause ReDIAL to display the following screen:



The Case records for the required client can be displayed by using the mouse to click on the button to the left of the client name. Where a client appears more than once in this window it is because there are several active cases for the client. In the example above, John Smith has two cases active.

The functions of the other buttons on this screen are:

Enquiries

The 'Enquiries' button will cause ReDIAL to display the enquiries that are allocated to the caseworker named at the top of the window. If the 'show all' box is checked then both completed and uncompleted enquiries are displayed. If the 'show all' box is clear then only uncompleted enquiries with a date between the 'Date From' and 'Date to' fields are displayed.

> TIP: If a caseworker does not see a client appear in this window then it is likely that their enquiries have been completed. Try ticking the 'show all' box then press the F9 key to refresh the screen. It is likely that the client will then appear.

Cases

The Cases button will display Cases allocated to the Caseworker named at the top of the Window. Use the 'show all' check box to display all cases regardless of their status or date.

Reviews

Each case can have a Review date associated with it. A review date is a date when a significant event is expected to occur, either on that date or shortly after. A review date would be set by a caseworker to remind themselves that they must take an action. A review date might be set a week before the deadline for an appeal against a benefit decision, in order to remind the caseworker that a benefit appeal needs to be lodged for the client. Only review dates between the 'Date from' and 'Date to' fields at the top of the window are displayed. If a wider date window is required then either date may be changed by using the mouse to click in the field and retyping the date.

Reviews for All Staff

An office manager may wish to check review dates for all caseworkers in the office. To save having to select each caseworker in turn and viewing their review dates the manager can click on the 'Reviews for all Staff' and see all Review dates. Once again, the 'Date from' and 'Date to' fields can be changed.

Browse

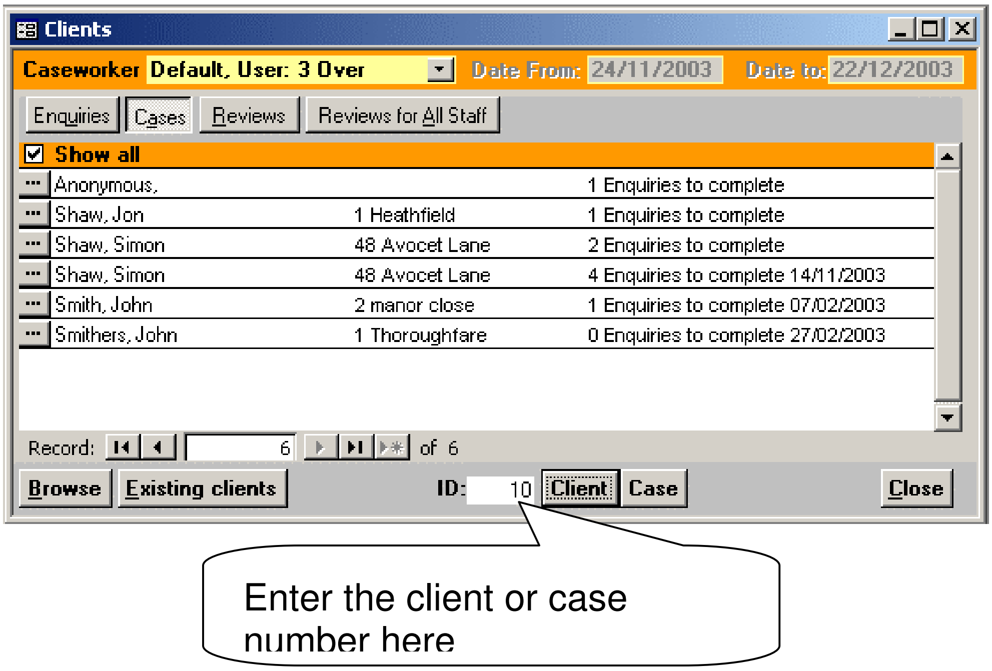
The 'Browse' button will cause ReDIAL to display the 'Client/Enquiry' screen with the lowest client number displayed. The arrow keys can then be used to scroll though the client records. For a large client database this process will become very lengthy. A more efficient approach would be to use the ‘Existing Clients’ button as described in the next paragraph.

Existing Clients.

‘Existing Clients’ will cause ReDIAL to display the ‘New Call’ window that a caseworker can use to search for a client.

Client and Case

The two buttons enable a caseworker to enter the identity number of a client or case and display the relevant client or case. They are not the preferred way of selecting clients or cases, the ‘Existing clients’ button should be used in preference.



Close

The ‘Close’ button will close the window when required, however, it is not necessary to close this window before moving to another.

4.6 Organisations

ReDIAL is supplied with a database of national organisations of interest to people with disabilities. Local organisations can be added to the database to extend its usefulness. As well as enabling a caseworker to find organisations that may be able to help a client, letters can be addressed to an organisation by simply picking their name from the database.

As with any large database, one of the main problems is trying to extract the information you require without being swamped. ReDIAL offers a variety of methods for searching the database which will be described in section 6 Organisation Database.

4.7 Library

A click on the 'Library' menu displays a list of different types of information that may be useful to a caseworker. They are:

- FAQ's
- FUN's
- Publications
- Comm. Decisions
- Standard Phrases
- Benefits
- Post log

FAQ's – Frequently Asked Questions

ReDIAL keeps a single list of Frequently Asked Questions that can be accessed or added to by any caseworker. When created, each FAQ can be assigned a super category and sub category from the list configured by the ReDIAL administrator. These fields can be used in the same way as they may be used in the organisations screen to filter the FAQ's so that only those relevant are displayed.

> TIP: You may be tempted to enter a FAQ as:
>
> Where is the….?
>
> What is the phone number for….?
>
> If you do this most FAQ's will begin with the letter W.
>
> It is better to use a more meaningful first letter such as:
>
> Benefit Agency – which office deals with Yorkshire?

FUN's – Frequently Used Numbers

ReDIAL keeps a list of frequently used numbers for each caseworker. A caseworker can simply add numbers to their list by typing a name, simple description and the telephone number. There is no save button; the number is saved when the window is closed.

A caseworker can look at frequently used numbers entered by another caseworker by using the pull down list at the top of the window to select another caseworker's name.

Numbers are deleted by clicking in either the name, description or number box and clicking the delete button. A pop up window will ask you to confirm deletion.

Publications

ReDIAL has a list of publications for people with Disabilities, together with contact details for the organisation that produced the publication. The list of publications is viewed via a screen with identical layout to the organisation screen so the user should refer to section 4.6 Organisations for detailed instructions on how to search the list of publications.

Comm. Decisions – Commissioners Decisions

There is a list of commissioners decisions relevant to people with disabilities in ReDIAL. Searching of the list of Commissioners decisions is rather more constrained than searching Organisations or Publications; only the initial letter can be used to search Commissioners Decisions. Use the mouse to click on the button to the left of the decision to display the full text of the decision.

Standard Phrases

Standard phrases are used when writing letters to a client or on behalf of a client. The standard phrase window enables a caseworker to add, amend or delete a standard phrase. As these phrases are standard across all caseworkers care should be taken to ensure that they are applicable to all or most caseworkers in the office rather than specific to a single worker.

Care should also be taken when deleting a standard phrase as your unused phrase that you wish to delete may be another caseworker's favourite! It is good practise to assign each standard phrase a super cat or a sub cat to make it easier to search for the phrase later.

Benefits

This menu item enables caseworker to view benefit rates and Administrators to view and amend benefit rates. **Any changes made here by Administrators will affect all financial gain calculations performed across the system.** It is essential that when benefit rates change, an end date is inserted for the existing benefit rate and a new rate entered together with a start date. There is a benefit rate editor menu under the administrator's range of menus, described in section 8.4 Benefits Editor and ReDIAL administrators may use either menu to change benefit rates.

Post log

ReDIAL will log any client letters created using the ReDIAL letter function on the Case screen if the Caseworker clicks the 'Add to Post Log' button on the letters screen. The Post Log function enables a caseworker or admin assistant to add letters created outside ReDIAL to the electronic post log maintained by ReDIAL. The fields to be completed are:

In/Out	Pull down the list to specify whether the letter is outgoing from the office or a letter incoming to the office
Date	is completed automatically by ReDIAL
Internal	This field is the name of the person in the office who is either: The person in the office sending an outgoing letter **or** The person in the office who is the addressee on an incoming letter.
External	Is either: the name of the addressee on an outgoing letter **or** the signatory on an incoming letter
Cost	Is the standard charge for a letter for an organisation which charges directly for time and expenses.
Description	An item from the pull down list can be selected to describe the letter or an alternative may be typed in the field.

4.8 Admin

The Admin menu contains all the sub menus necessary to configure ReDIAL for the office and service being provided. It enables the configuration of the contents of all the pull down lists, including local area, city and county. Because so much of the system can be configured from this menu it is recommended that this menu is only made visible to a few people who are designated to be ReDIAL administrators. These people should be trained in the administration of ReDIAL, in addition to the training necessary to undertake casework. Administration and configuration of ReDIAL is described in detail in section 5 CASE Recording

4.9 Window

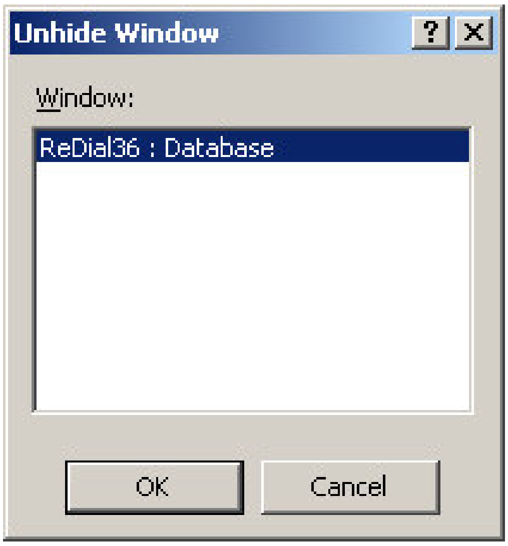
The window menu gives the user the ability to change the way the various ReDIAL windows are displayed on the screen.

Tile Horizontally	When multiple windows are displayed, they appear one above the other, with a horizontal split.
Tile Vertically	When multiple windows are displayed they appear side by side on the screen with a vertical split between them
Cascade	When multiple windows are displayed they overlap each other, a mouse click must be made in the window that the user wants to be on top.
Arrange Icons	Has no function within ReDIAL.

The window menu also has 2 further options:

Hide
Unhide

The unhide option results in the pop up screen



If ReDIAL36: Database is selected, followed by OK then all the Microsoft Access tables become visible to the user. The user can then view or edit any item in the ReDIAL underlying database. **It is recommended therefore that access to the Window menu is restricted to ReDIAL administrators**.

Even administrators will not need to unhide the database and make changes under normal circumstances. This feature can be helpful in diagnosing problems with the database should any arise.

When an administrator has completed any modifications to the database, all the tables can be hidden from the user by selecting window→hide from the menu.

5 CASE Recording

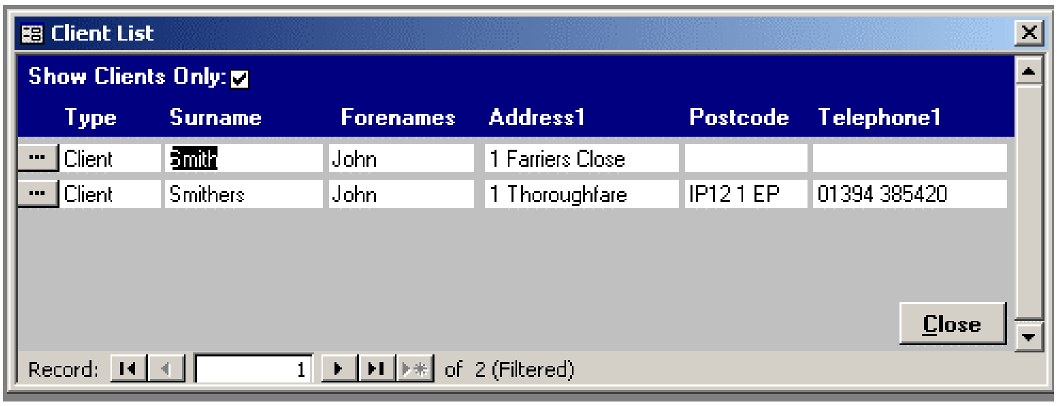
Case recording in ReDIAL is done through the Clients/Enquiries screen. This screen is not available directly from any of the menus, it can be accessed by selecting either the 'New Call' menu or the 'Clients' menu.

5.1 Searching the Client Database

To search the client database, select the 'New Call' menu, ReDIAL will display the 'Check Clients' screen. Enter the surname of the caller, or part of their address or 'phone number into the 'Check Clients' screen followed by clicking the 'Show List' button. The ReDIAL client database is searched and only if none of the records found match the caller should the caseworker create a new client.

When entering a name or part of a client address or phone number, ReDIAL will search for any part of the client surname, address or phone number. For example if a caseworker was unsure of the spelling of a client surname which might be Shaw or Shore, they could enter 'sh' as the surname. ReDIAL would find all clients with 'sh' in their name and would include clients such as 'Ashby' or 'Marsh' where the 'sh' occurs in the middle of the name.

Should ReDIAL find a number of clients that match the details entered it will display the 'Client List' window.



The caseworker should click the ... button next to the client they believe the be the one they are about to deal with and the 'Client/Cases' screen will be displayed with the client's full details and their previous cases and enquiries displayed for the caseworker to view. If none of the clients listed match the details of the client to whom the caseworker is speaking the caseworker should simply click the close button on the 'Client List' screen. The 'Check Clients' window will now have an additional button 'New' shown in Figure 5-1 New Client button.

5.2 Creating a New Client

Once a caseworker has searched for a client and found that there is no client of that name and address on ReDIAL, a new client record should be created by clicking on the 'New' button

Figure 5-1 New Client button

ReDIAL will display the client/cases screen with all the client details blank.The Caseworker can then insert the client's name, address etc by clicking in each white box in turn and entering the required information.

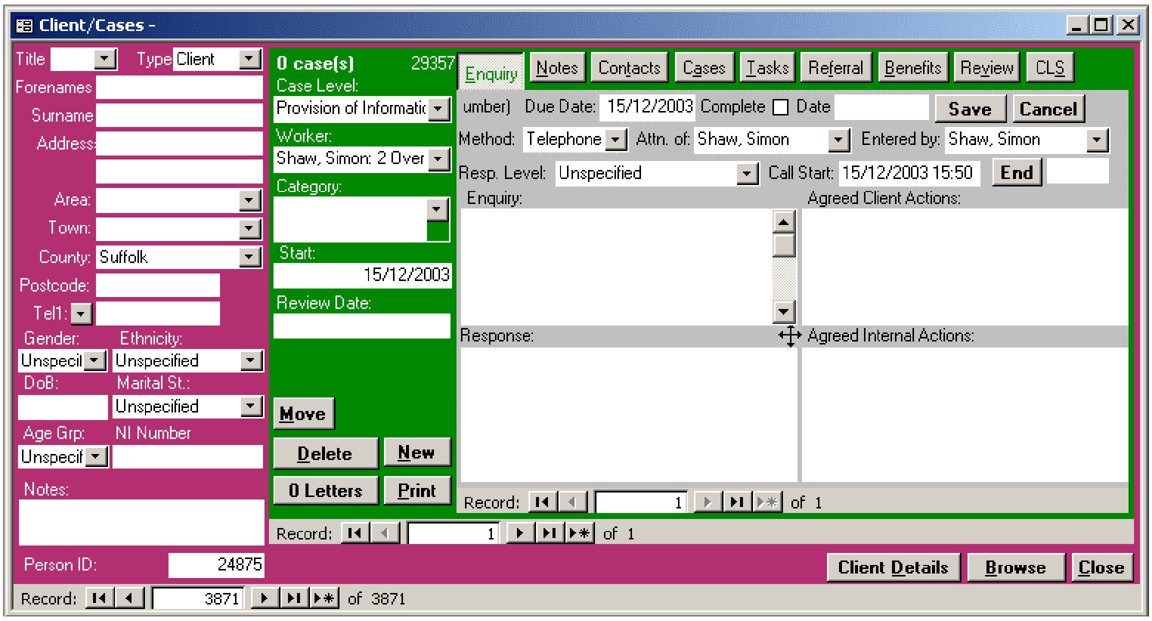


Figure 5-2 Blank Client - Cases Screen

The TAB key can be used to move forward through the white boxes and SHIFT+TAB to move in the reverse direction through the boxes. Colours are used to differentiate the different types of information displayed on the screen, the purple area contains all the unchanging information about a client. Information is entered into the fields using the mouse, or the TAB key to move between fields.

Type: The Type field should be set to client. This is the case even if the caller is a friend or relative of the client. If this field is set to any other value then the name may not show during searches of the client database.

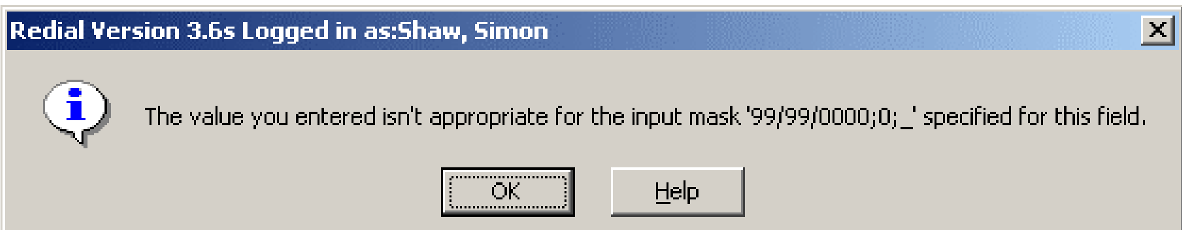
Contact may be used for a professional involved in case, for example a social worker involved in a case.

Address: The first two lines of the address field are available for house name and street, no checks are performed on these fields.

Area, Town and County are checked by ReDIAL against the names already in the database. If a caseworker types a name that is not already in the database then it offers the caseworker the option of adding the name to the database. The caseworker should double check their spelling of the Area, Town or County as it may be that the name has merely been miss-spelt.

TIP: Once ReDIAL has been configured for use in a particular area it maintains an association between Area and the remainder of the postal address. If the Area is selected from the pull down list, ReDIAL will automatically complete the Town and County fields.

DoB: Entering a date of birth is preferable to entering a client's age group as ReDIAL will recalculate the client's age every time their record is accessed. If their age group is entered then this may be misleading should a client contact an office after a gap of some years. Dates of birth must be entered using 4 digits for the year as in 23/09/1955. If a two digit number were entered for the year, say 55 then ReDIAL would not accept this as a valid year and give the caseworker an error message, shown below



Client Details

A click on the 'Client details' button gives access to further details about the client.

Status This field enables a caseworker to select a status for the client from a list defined by the ReDIAL administrator. This field may be used in the people menu to find clients with a specific status

Categories – This field enables the caseworker to allocate the client to one or more categories. Once again the people menu can be used to search for clients in each of the categories. These categories are not used for display in the analysis screens at present.

In addition to the fields there are buttons that may be used by the caseworker.

‘Delete’ This button does what it says and deletes a client from ReDIAL. ReDIAL asked the caseworker to confirm that the client is to be deleted, but once the user clicks ‘Yes’, that client and all their case records are deleted from ReDIAL. It will only be possible to regain access to the client records by restoring a backup of the ReDIAL data store. Even then the deleted client records must be retyped as other client records may have been added to ReDIAL before the erroneous deletion was found.

‘Search’ – ReDIAL will display the people search window that enables the caseworker to search for clients by status or category.

‘Filter’ – ReDIAL will display a screen that will enable the caseworker to undertake more sophisticated searches so that clients with entries in two or more categories can be found. This functionality is not yet implemented in ReDIAL 3.6s

‘Find’ – The Find button enables a caseworker to find a client by surname. It repeats a part of the function available from the ‘New Call’ menu; the ‘New Call’ menu is the preferred way of finding clients in the database.

‘New’ – The ‘New’ button enables a caseworker to create a new client from this screen. The client’s name and address are entered on the Client details screen rather than on the ‘Client/Enquiry’ screen. Information is entered in exactly the same way and the same comments and tips on how best to enter DoB and Area, Town and county apply to this screen.

‘Print’ – the ‘Print’ button will print a copy of the client details to the Windows default printer. No case or Enquiry details are printed from this button.

‘Close’ – The close button will cause ReDIAL to save the information that has been entered before closing the window.

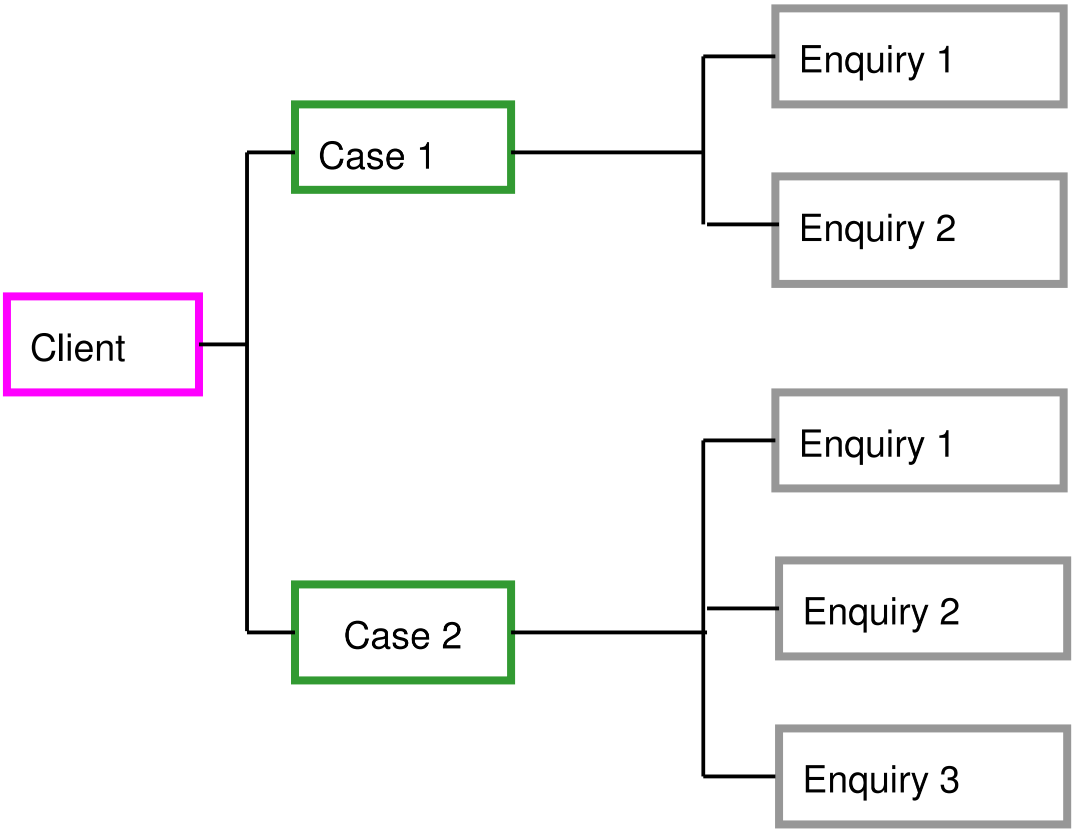
‘Browse’

The Browse’ button enables the caseworker to browse through the clients one by one, using the arrow buttons at the bottom of the purple part of the window.

TIP: Once the number of clients has grown above a few tens, this is a very laborious way of finding a client and it is recommended that the 'New Call' menu is used to find clients by searching for a specific part of their details.

5.3 Creating Cases – 'The Green Screen'

Each client in ReDIAL may have any number of cases, each case represents a major area of advice to the client. Each time a client contacts the bureau, a new enquiry is created against the case. After some number of enquiries from a client, their records may be structured as shown below:



The Case is defined mainly by the category that the caseworker assigns to it in the green area of the screen.

5.3.1 Case Level Details

A caseworker may record the following information about a case:

Case level – The case level describes the type of information or advice that is being given to the client. The descriptions may be configured by the ReDIAL administrator, but when shipped initially the descriptions range from 'provision of information' through 'provision of advice' to 'formal representation'. In general, the case level may well change during the period over which advice is offered to a client. For example, a case which starts as provision of advice regarding benefits that the client may claim may well end as a case involving formal representation if the client is represented at a Benefit Tribunal. Enquiries also carry a field called 'response level', with the contents chosen from the same list as is used to choose the case level. The case Level will tend to be the same as the most demanding level of advice that has been provided to the client

Worker- The worker field is automatically set by ReDIAL to be the login name of the caseworker who is setting up the Case. The Case may be being set up by an admin assistant in which case a caseworker can be chosen from the pull down list that will contain all workers authorised to use the system.

Category – The Category of the case is selected from the pull down list. Items on the list are configured by the ReDIAL administrator to suit the requirements of the advice service. When shipped ReDIAL contains a list of categories suitable for a Disability Advice Service.

Start – The start of the case is set automatically by ReDIAL to be the date that the case is being entered.

Review Date – The Review date is a reminder to the caseworker that a key date for the case is approaching. It can be set by the caseworker to any date in the future, for example a few days before the date when appeal papers must be lodged.

5.3.2 *Case Level Buttons*

At the Case level there are several buttons that enable the caseworker to perform many functions. The first 5 buttons whose function will be described are:

Move – The move button enables a case belonging to one client to be moved to another client or person. There are two situations where this button may be used:

1. When a case has been initiated against the name and address of a friend or relative. Subsequently the client mainly involved becomes known to the bureau and the case needs to be moved to their own name and address.
2. If a client has been accidentally duplicated in ReDIAL. This has happened when a caseworker has searched for a client with a similar sounding name but different spelling, not found the client and entered a new client with the differently spelt name. In this situation, the case on the client with the incorrectly spelt name can be moved to the correct client.

In the first of these 2 situations, the client details could simple be amended to the new details; however, if the friend or relative was already being advised by the bureau in their own right this would not work as intended as all their cases and enquiries would also be associated with the new name.

Delete

The delete button will cause ReDIAL to delete the current case, **and all the enquiries associated with it.** Once deleted, the only way of recovering the information in the case is to retrieve a backup copy of ReDIAL, find the client and case that has been deleted then re-enter the case into the live database. This will be very laborious for a substantial case.

New

It is the new button that creates a new case. Users should be aware that although they may change the case details, such as the case level or category, this will only change the details of the existing case. In order to create a new case the 'new' button must be depressed first, this **will** create a new case with the enquiry area blank green. The case level and category should be entered and the save button pressed, only then will a grey enquiry screen be displayed.

Letters

The letters button will cause ReDIAL to open the letter writing window. The caseworker will be able to select standard letters or phrases, add them to a letter and add additional text to the letter. The letter can be easily addressed to the client or to an organisation from the organisation database, described in section 5.4. The number of letters written is shown on the letters button.

Print

The print button will cause ReDIAL to print the case and all the associated enquiries on the default windows printer. Should a paper record be required of all enquiries then the caseworker will need to select each case using the arrows at the bottom of the green part of the client/enquiry window, then click the print button for each case in turn.

5.3.3 Enquiry Button

In most cases when a client and case is selected, the grey enquiry screen appears automatically. If not, a click on the 'Enquiry' button at the top of the Case window will cause the enquiry screen to appear. The enquiry part of the Client/Enquiry window is the area where **all** contacts with the client are recorded. Once a case has been created for a client in the green area of the window then a caseworker can start to enter the details of the enquiry in the grey area of the window. The enquiry area has been sub-divided into four parts to help a caseworker structure their case records. The four main parts of the window are:

- Enquiry
- Response
- Agreed Client Actions
- Agreed Internal Actions

A single left click with the mouse in any of the four windows will activate that window. Scroll bars will appear and a caseworker can then enter information into the box.

When there have been multiple enquiries regarding a case, each enquiry can be viewed by clicking on an arrow below the grey enquiry screen. The most recent enquiry will always be number 1. For more details on navigation see Figure 4-1 Case and Enquiry Navigation.

Enquiry

This area enables a caseworker to type what the client has asked about. There is no limit to the amount of text that can be typed into this window. If there is a lot of medical or other history associated with the case, this should be entered in the Notes field for the case. The notes field is displayed by a single click on the 'Notes' button, next to the 'Enquiry' button, see Section 5.3.5

Response

The response area is intended as the area where a caseworker will record what they advised the client in response to the enquiry. Once again there is no limit to the amount of text that can be entered, scroll bars will appear when necessary.

Agreed client actions.

In this area the caseworker should enter any actions that the client has agreed to undertake, for example to visit their GP.

Agreed Internal Actions

It is here that the caseworker should enter any actions that are to be undertaken by the bureau; for example to telephone the DWP on the client's behalf.

The quality of case recording will be dependent on the clarity of the entries in these four areas. Entries should be specific and unambiguous.

Of course a client may wish to discuss more than one case during a phone call or office visit. ReDIAL relies on the caseworker to split up the conversation into those parts that relate to each different case and to enter them in the enquiry screen associated with the appropriate case. While this may be difficult in the initial stages of advising a client, later this approach has advantages as the case records will have a lot more structure. Some cases may become inactive while others remain active and the caseworker will then be in a position to browse through those enquiries in the active cases to get a view of the client's situation.

5.3.4 Other Enquiry Fields

In addition to the four main text windows that have been described there are several other fields that should be completed by the caseworker before an enquiry is saved.

Due Date: This is the date that any actions that result from the enquiry are due for completion. ReDIAL inserts the date of the enquiry in this field, but it should be changed where the enquiry results in an action that will require some time to complete. Where it is crucial that an action has to be completed prior to a deadline, also enter a date before the deadline as a review date in the green area of the screen.

Method Select the method used by the client to make contact with the your organisation from the pull down list Enquiry Response Level. Select the response level for the enquiry from the pull down list. A complex case that might involve formal representation may nevertheless have enquiries that are merely 'provision of information'. This might be the case when a client rings to find out whether forms have been received, or whether a date has been fixed for an appeal.

Enquiry Complete & Date An enquiry is marked as complete when all actions have been completed. In order that there is an independent check of advice given, some organisations have a policy that a caseworker would not mark their own case as complete; that would be done by another caseworker or by the manager or their deputy.

Attn of The caseworker who takes a call from a client may not be the worker who has been undertaking the casework. The caseworker who takes the call should use the pull down list to select the caseworker who is dealing with the case, or who can deal with the specific enquiry.

Entered by The field is to record the caseworker who took the call and is set to the current user. On the assumption that all caseworkers have their own usernames and do not log on as other caseworkers, this field should not be changed, so that in the event of confusion regarding an enquiry, the name of the caseworker who took the call can be seen.

Call Start & End The call start time is set by ReDIAL to the time that the enquiry was created. The end button will, when clicked with the mouse, cause ReDIAL to record the time that the call ended. This function will enable an organisation that charges for caseworker time to calculate the time spent on an enquiry.

5.3.5 Notes

The Notes button opens a large window where a caseworker may insert a history of the clients problems or conditions. In many cases, initial contact with a client will result in a lengthy history that would be inappropriate to insert in an enquiry. Where there is a single case for a client, there will be a single notes button. Where a client has several cases, the client history will probably relate to more than one case. Rather than entering or copying the client history between cases the caseworker can enter the client history once. In the notes field on the other cases the caseworker could enter

'see notes field for case 1'

In addition to adding text to the main window, there are 4 buttons available to the caseworker:

- Add Comm. Decision
- Add Contact
- Add Publication
- Add Organisation

Each of these buttons is designed to enable the caseworker to search through the other listings in ReDIAL to find people or organisations who have skills to assist with the handling of this particular case.

In all four cases, a left mouse click on the button will cause ReDIAL to display a window similar to the organisation search window. Once a particular person or organisation has been found, the caseworker should left mouse click on the ‘select’ button and the details will be associated with the client’s case records.

5.3.6 Contacts

Where contact has been made with a worker from another agency who has specific skills to assist with the client, their contact details can be entered using the ‘Contacts’ window. The function performed by the ‘Contact’ button is identical to that provided by clicking ‘Notes’ and then ‘Add Contact’.

5.3.7 Cases

The ‘cases’ button will reveal a window that will enable a Caseworker to select another related case with some attributes the same as the current case. There are 3 buttons that may be used to help select the related case; they are:

Staff – enables the caseworker to select a case with the same caseworker as the current case

Category – enables the caseworker to select a case with the same case category

Response Level - enables the caseworker to select a case with the same response level.

The purpose of this function is to help a caseworker identify a case with similar characteristics so that, by browsing the other similar case, hints may be obtained as to how best to deal with the current case.

5.3.8 Tasks

The tasks button allows a caseworker to enter the time spent working on a case when they are not dealing with an enquiry. For an agency that charges for the time spent on a case, such as those with a CLS franchise, this field will enable the time spent overall to be calculated by ReDIAL.

The Caseworker should select the type of activity from the pull down list and the time spent from the adjacent pull down list.

5.3.9 Referral

Sometimes an organisation will receive a call from a client about a service that they don't offer. The 'Referral' button is used to record the fact that the client has been referred or (more usually) signposted to another organisation. There is a clear distinction made between 'referral' and 'signposting' by the Community Legal Service which may be applicable to your organisation.

Referral occurs when some client case records are passed, with the clients agreement, to another agency so that the other agency can more effectively deal with the client.

Signposting occurs when the client is told of a suitable agency that can handle their problem and is given the address or phone number of the appropriate agency.

Once a client has been referred or signposted to another agency, there are five fields with pull down lists to record:

Type of referral	referral or signposting
Referred by	The caseworker who made the referral
Reason	why it was necessary to refer the client.
Decision	whether the other agency was prepared to accept the client. Of course referrals should not be made to an organisation that cannot accept the client.
Decision date	If the agency to which the client is to be referred cannot make an immediate decision, the caseworker should endeavour to establish when a decision on acceptance will be made and enter it here.
Referred to	enables the caseworker to select the agency the client was referred to from the organisation database. If the organisation was not in the database then it may be entered in the comments field along with any other relevant information

After the referral or signposting has been made, both the client and the agency should be followed up after a suitable interval to make sure that the client is receiving suitable advice. There are two tick boxes that the caseworker can use to indicate that they have followed up either the client, the other agency or both.

5.3.10 Benefits

The 'Benefits' button does **not** provide access to a benefits calculation program, it enables a caseworker to record *financial gain* for a client. If, after advice from a caseworker, additional benefit is paid to the client, this window enables the value of the additional benefit to be recorded; this is known as financial gain.

The value of additional benefit is important, especially to some local authorities who fund advice services, as the additional benefit represents additional income into the local authority area. The analysis function contains the capability to aggregate the financial gain by area and by Postcode.

Following a left mouse click on the 'Benefits' button, a caseworker will click on the 'Add Benefits' button. A list of benefits will be displayed and the caseworker can select one or more benefits that have been obtained for the client using the tick box next to the benefit titles. Once benefits have been selected, the caseworker should click 'OK' and the benefits selection screen will disappear, leaving the selected benefit with its annual value visible.

Often benefits are backdated, in this case the duration in weeks can be changed to indicate that the gain in the current year will be increased by the appropriate number of weeks.

A benefit award date should be entered by the caseworker as it is the award date that will be used by ReDIAL to calculate overall benefits increase in a particular year.

Should a benefit have been selected in error, the delete symbol can be used to delete the benefit from the case record.

5.3.11 Review

It is good practice for all cases to be reviewed by a different caseworker, senior caseworker or manager. The 'review' button enables the reviewer to make comments regarding a case and the advice given by the caseworker.

There is a pull down list that simply enables the reviewer to indicate whether the case has been dealt with in a satisfactory manner. In addition the reviewer can add text in the 'notes' field to indicate either areas that have been handled well by the caseworker or areas where more work is needed on the case. Some agencies use the reviewer to mark the 'complete' tick box on the enquiry record once the reviewer is happy that the client has been advised correctly.

5.3.12 CLS

The 'CLS' button gives the reviewer a more formal checklist of all the items that should have been dealt with and forms that should have been completed by the caseworker. The checklist can be configured by a ReDIAL administrator to reflect the procedures in use within a particular agency. Agencies seeking a CLS franchise will be expected to maintain a checklist and to see that it is completed before a case is closed.

5.4 Case Letters

The letters button can be used to write letters to a client or to an organisation on behalf of the client. By writing letters within ReDIAL the correspondence is maintained with the other client records and a separate filing system either computer or paper based does not have to be maintained. Letters are associated with a case, so a client may have 2 letters written on their behalf associated with a case on benefits:DLA, they may also have letters associated with another case, say on transport. When the Client/Enquiry screen is opened for a client, if letters have been written regarding a case, then the letters button which normally will have the caption '0 Letters' will change to indicate the number of letters written and saved.

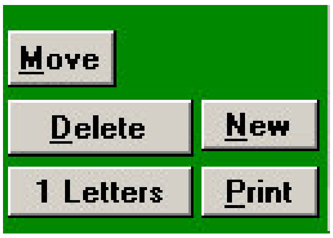
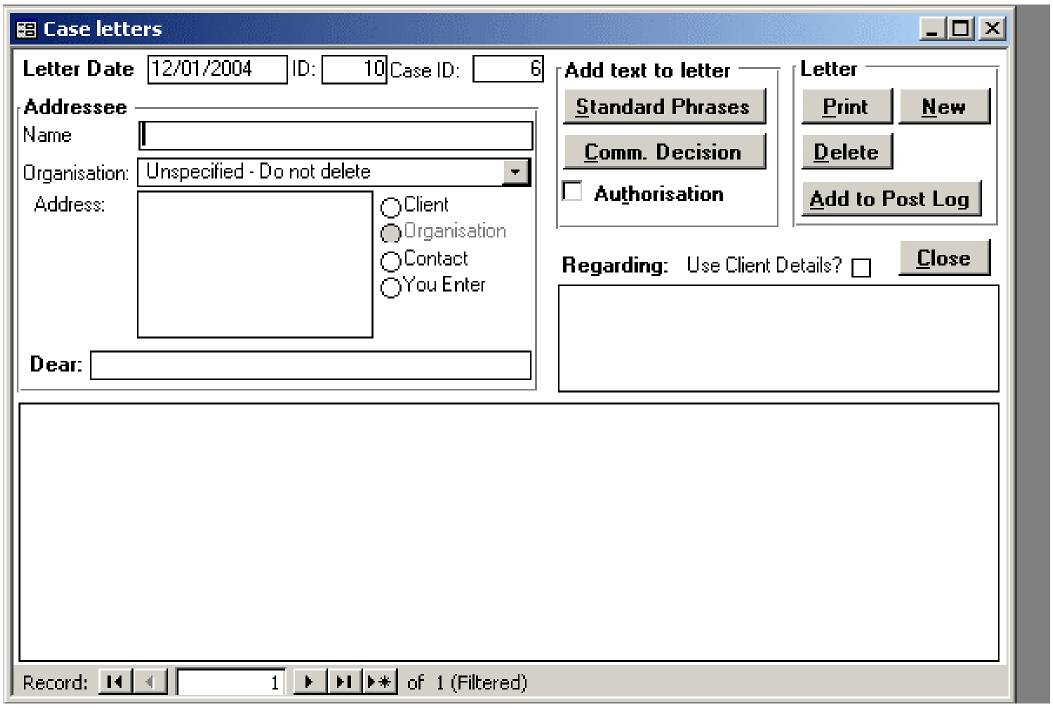


Figure 5-3 Letter button showing 1 letter written

5.4.1 Creating a Letter

A caseworker can create a letter associated with a case by selecting the '0 Letters' button. ReDIAL will then display the Case Letter window shown below.



The functions available from this window are:

5.4.2 Addressee

The addressee can be selected to be:

Client – in which case the client's address is copied directly into the Address box

Organisation – An organisation needs to be selected from the pull down list of organisations. Then the organisation button will not be greyed out and can be selected. When selected the organisation's address will be copied into the address box

> **TIP:** As this is the complete list of organisations it is pretty long to scroll down. So long as the first part of the organisation's title is known, select the text 'unspecified do not delete' and just start typing into the organisation pull down list box. ReDIAL will automatically move down to the part of the list where organisations begin with the letters typed. Try typing 'age'. The scroll bars can be used to select exactly which organisation is required.

Contact – Selecting the contact button will cause ReDIAL to display the search window that will enable a contact to be selected and their address copied into the address box.

You Enter – where none of the above are appropriate you can select this button and just type the desired name and address into the address box.

5.4.3 Regarding

The regarding box can be used either to type text that will appear in the letter as RE then the text you typed. If the letter is addressed to a third party regarding your client, then tick the 'use client details?' box and the client details will be inserted.

5.4.4 Adding Text to a letter

Standard Phrases

The main body of the letter can be typed in the large box. Alternatively standard phrases and standard letters may be selected by clicking on the 'Standard Phrases' button, selecting an appropriate letter or phrase use the search capabilities, then click on the 'select' button next to the letter or phrase or letter that you wish to insert.

Once the phrase or letter is inserted it can be edited or text added where necessary.

Commissioner's Decision

Should it be necessary to refer to a specific commissioners decision, the text of the decision can be added by clicking on the 'Comm. decision' button. As before the extra text can be added using keyboard and mouse in the normal way.

Authorisation Letter

Under the 'Comm. Decision' button is a tick box labelled 'Authorisation'. If a tick is placed in this box, then the text of a standard authorisation letter is inserted into the body of the letter. The standard letter that is inserted into the body of the letter is defined by the ReDIAL administrator using the admin → configuration menu described in paragraph 8.6.1 System Configuration. The details of the authoriser should be added to the bottom of the letter.

Salutation – A salutation is added automatically by ReDIAL. It is of the form:

> Yours Sincerely
>
> 'Your user name'
>
> 'your role'

A Caseworker who's name is Simon Jones and who is a Welfare Rights Officer would see that letters created by him would finish:

> Yours Sincerely
>
> Simon Jones
>
> Welfare Rights Officer

The salutation only appears in the print preview window and can't be changed for a specific letter.

5.4.5 Printing

A letter is printed by clicking on the 'Print' button. ReDIAL presents the user with a preview window so that final checks can be made on the layout of the letter before it is printed. Margins can be changed by using the file → print menu rather than clicking on the print icon. Be careful not to disturb the top margin as this will have been set by the ReDIAL administrator to ensure that the addressee text will be printed below the heading on headed paper and also be visible through the address window on an envelope.

5.4.6 Add to Post Log

Once a letter has been checked and printed, the user or caseworker may choose to add the letter to a post log maintained by ReDIAL. An agency can decide whether to use this feature or not. If it is used, ReDIAL will present the user with this screen

	In/Out	Date	Internal	External	Cost	Description
	Outgoing	14/11/2003	Andy Harris	John Smith	£0.00	Invoice
	Incoming	14/11/2003	Fred Smith	Simon Jones	£0.00	Newsletter
	Outgoing	20/11/2003	John Smithers	User Default	£0.00	Case Letter
*	Outgoing	20/11/2003			£0.00	

The fields are:

In/Out – whether the letter is incoming to the office or outgoing

Date - The date of the letter. For outgoing letters this will be the date on the letter, usually the current date. For incoming letters this will be the date on the letter.

Internal – the caseworker within the agency who is either the recipient of an incoming letter or the signatory of an out going letter.

External – The person external to the agency who is either the recipient of an outgoing letter or the signatory on an incoming letter

Cost – If the agency charges for handling letters, the cost can be entered here. The cost entered here will be added to other costs associated with the case using the 'Tasks' button on the Client/Enquiry screen.

5.4.7 New

Where more than one letter is to be created for a case then the 'new' button will automatically save the letter just written and present the caseworker with a new blank letter to complete.

5.4.8 Delete

The delete button will cause ReDIAL to ask the caseworker to confirm that they wish to delete the letter. Once deletion is confirmed, the letter is deleted irrevocably; the only way of retrieving a deleted letter is from a backup file. It is recommended that all letters written on behalf of a client using ReDIAL are saved and stored within ReDIAL.

5.4.9 Close

The close button will automatically save any letters written to the ReDIAL database before closing the window.

6 Organisation Database

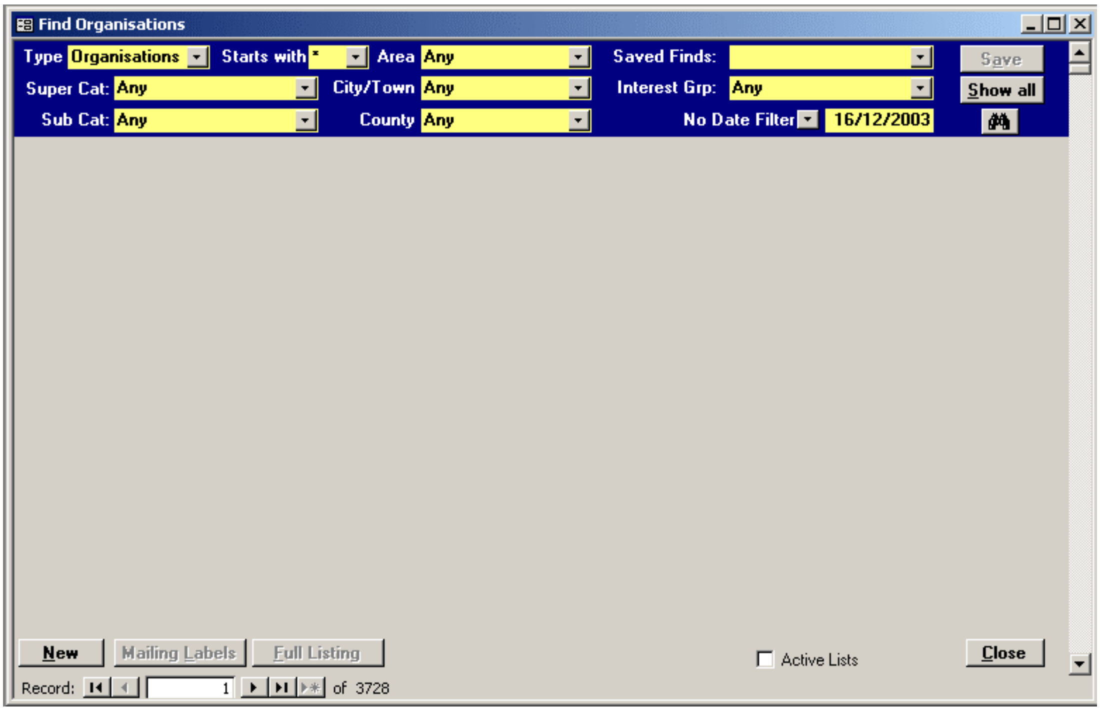
6.1 Contents

The organisation database delivered as a part of ReDIAL is particularly relevant to those agencies that deal with clients who have disabilities. Organisations can be added to the database or deleted if they are not considered relevant to the casework undertaken by the agency.

Because organisations may be added or deleted, the organisation database may be tailored for agencies working in a variety of different fields.

6.2 Searching

When a caseworker clicks on the ‘Organisations’ menu ReDIAL displays the following screen:



No organisations are displayed! However, organisations will be displayed when any change is made to the search criteria, or if the ‘Show All’ button at the top right of the window is selected. In the next few paragraphs techniques will be described to help a caseworker search the database for organisations relevant to the client. All of the search techniques can be combined to restrict the number of organisations displayed. For example, if the initial letter of the organisation is known, this can be specified with the ‘Starts with’ list. This may be combined with the County field to display only organisations in that County. Try ‘Starts with’ D then select County to be *West Yorkshire* or *Suffolk*.

Once an organisation of interest has been located the caseworker should click on the  button to the left of the organisation name to expand the organisation’s details.

Starts with

Perhaps the simplest search; the caseworker can use the pull down list to select the first letter of the title of the organisation. This is very effective for well known organisations such as ‘Age Concern’

Type

This pull down list can be used to search through other types of information held by ReDIAL. For example, this field can be set to ‘people’ and the client database searched in exactly the same way as the organisation database.

Field Reset

If a field has been used to specify a letter, area, super cat or cat, it may be reset by putting the mouse pointer in the field and double clicking the left mouse button. All the fields may be reset using the reset button at the top right of the window.

Show all

If a caseworker did wish to see and alphabetical listing of all organisations, then expand the window to full screen using the symbol at the top right corner of the window. A ‘Show All’ button becomes visible, click this and all organisations are displayed in alphabetical order.

Area, City/Town and County

If a part of the address of an organisation is known, but little else, then pull down the list of Area, City/town or County. Only organisations in the location specified will be displayed.

The City/Town and County field are particularly useful ways of reducing the amount of information displayed. For example, the database contains contact details for many shopmobility schemes whereas a client probably only wishes to know of those in the surrounding area. Enter the appropriate County and only schemes in that county will be displayed.

Super Cat and Sub Cat

When an organisation is entered into ReDIAL it can be allocated a super category and sub category to indicate the areas of interest where the organisation provides services. The Super Categories and Sub Categories are the same as those used for recording the category of a Case, and may be changed by the administrator dependent on the type of advice work being offered.

Interest group

Similarly to the Super Cat and Sub Cat an organisation may be assigned to an interest group. The names of the interest groups may be configured by the administrator, dependent on the characteristics of the clients that you advise.

Saved Finds

Should a caseworker be asked many times for information in a specific category or a specific area, or a combination of the two, they can use the 'Save' button to save that combination of selections. Subsequently, when the same caseworker clicks on the organisation menu, they will be able to pull down the list of saved finds and the field will be set to the previously saved values.

Find Organisation

The find button allows the case worker to search for a specific word or words either in the title of the organisation or in both title and description. On clicking the find button with the mouse Figure 6-1 is displayed.

> **TIP:** unless the exact title of the organisation is known it is often more effective to pull down the 'Match:' List and select *'any part of field'*. If a match is not found, try changing 'Look in' to *'Find organisation'* as this will search the description as well as the title field.

If the exact title of any organisation or its spelling isn't known then a caseworker can enter a few characters and ReDIAL will find any organisation with those few characters in the Title. So, for example an entry of Dia in the 'Find What:' box will find all organisations with DIAL in their title

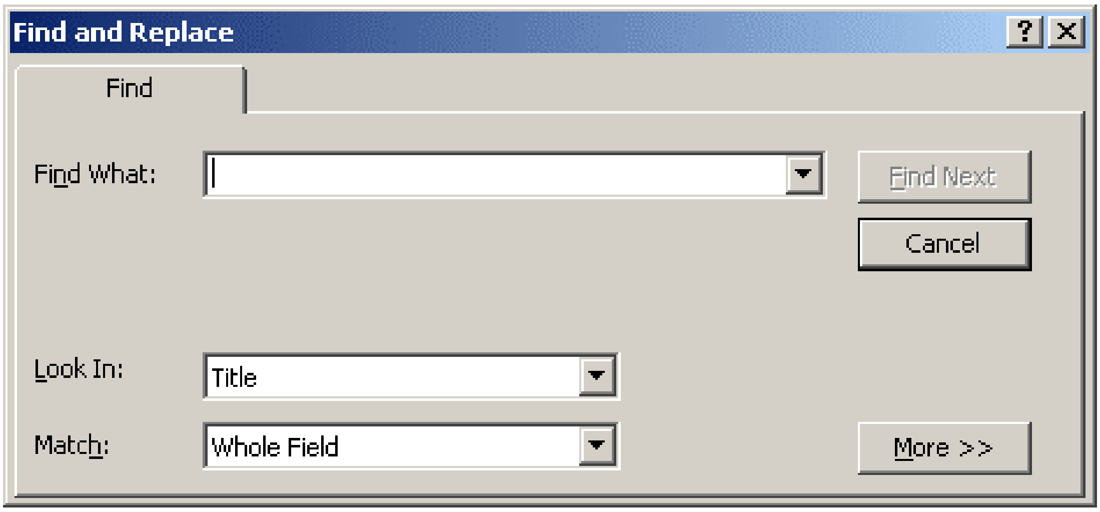


Figure 6-1

The find button also works in conjunction with any of the other filters, if the County has been set to Suffolk, then the find button is used, only organisations **in Suffolk** that match the ‘Find What:’ text will be displayed.

No Date Filter

This pull down list is designed primarily for ReDIAL administrators as one of the options is ‘last updated before’. This option can be used to select organisations whose information has been in the database and who should be written to the check that the information in ReDIAL is still accurate. A more complete description of how this may be undertaken will be found in the Updating Organisation Details section of this guide.

Active Lists

The ‘active lists’ tick box at the bottom of the window should be ticked if the user prefers the pull down lists to be displayed if the mouse is merely hovered over the list instead of being clicked.

6.3 Adding Organisations

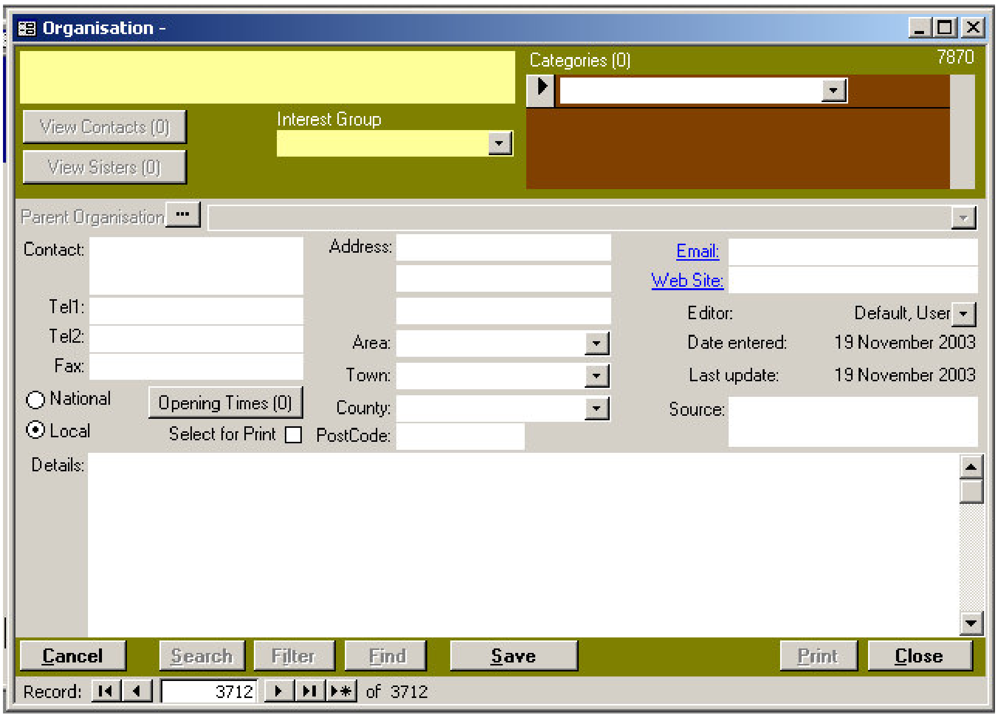
A new organisation can be added to the database by a left mouse click on the ‘new’ button at the bottom of the organisation screen. ReDIAL presents the user with the screen shown below. Information about the organisation should be entered into the different areas of the window as described:

Title - The title of the organisation should be entered in the yellow pane at the top left of the window.

Interest group – The pull down list should be used to enter the Interest group that the organisation serves. The interest groups that are available can be configured by the ReDIAL administrator.

Categories – The list of categories is the same as that used in the client/enquiry screen to describe the category of a case. More than one category can be selected if this is appropriate.

Address – The address can be completed in the same way as on the client/enquiry screen. The pull down lists can be used to reduce the possibility of spelling mistakes and to associate the correct Town and County with a local area.



National/local – This button should be set to the appropriate value.

Opening Times – This button will pop up a window with the opening times displayed. The pull down list is used to specify the day or part day that the organisation is open. The times can be edited if necessary to show actual opening hours.

Details – This box has space for any further information that you wish to enter against the organisation that may help a caseworker.

Save – Once all details for the organisation have been entered the 'save' button will commit the organisation to the database.

6.4 Updating Organisation Details

At intervals it will be necessary to write to each organisation to confirm that their contact details are still accurate and also that the organisation is happy to remain on the agency's database. It is common to write to each organisation every year. The date filter can be used to select organisations with a 'last updated before' date set to an appropriate value. The TAB key should be used to move on from the field; ReDIAL will then select all those organisations which were last updated before the date set.

Address Labels

Once all the relevant organisations have been selected ReDIAL enables the user to print address labels addressed to all selected organisations. In order to print address labels the user should select the button 'Mailing Labels' at the bottom of the window. A print preview window is displayed for the user to check before using either the print icon or the file→print menu to print the labels. The labels are printed in 2 columns, 8 labels per column. The Avery Label code for these labels is L7162.

Organisation details

Of course it will be necessary to print the information held regarding the organisation to enclose with a standard covering letter asking whether the information held is still accurate. ReDIAL enables the information held to be printed for all organisations selected. The user should click the ‘Full Listing’ button and ReDIAL will display a print preview window. The information shown in the print preview window should be printed using the printer icon or by using the file→print menu.

6.4.1 Deleting Organisations

Organisations are deleted from the database by selecting the organisation from the list, then select the ‘delete’ button. You will be asked to confirm deletion as once an organisation has been deleted it can only be recovered from a system backup file.

7 People

The ‘people’ menu enables a caseworker to search through the client database in much the same way as they can search through the organisation database. In fact, had the caseworker entered the organisation menu, then gone to the ‘type’ pull down list and selected *‘people’* that would have exactly the same effect as clicking on the ‘People’ menu.

The preferred way of searching the client database is via the ‘New Call’ menu. The ‘People’ menu is of use if a caseworker is trying to locate a client or a clients with a specific benefit or condition as that might be relevant to the current case they are considering. The most common use for the ‘People’ menu is the selection of clients for deletion from ReDIAL. The techniques for searching through the client database are exactly the same as are used when searching though the organisation database and the user should refer to section 6.2 for details.

7.1 Selecting Clients for Deletion

Most agencies will have a policy to ensure that clients who have not been seen by the agency for a certain time interval will be deleted from ReDIAL. The people menu can be used to select clients for deletion using the date filter. The Date filter can be set to one of:

Last Updated on
Last Updated Before
Last Updated Since
Last Case on
Last Case Before
Last Case After
Born on

The last updated date is set to the date when a caseworker has accessed any of the client’s details, even if a change has not been made to the client details or either a case or enquiry.

The last case field is set to the start date of the last case opened on the client. In many cases the last updated before selection will be used in conjunction with an appropriate value to select clients whose records have not been accessed for the appropriate interval so that they may be deleted from ReDIAL.

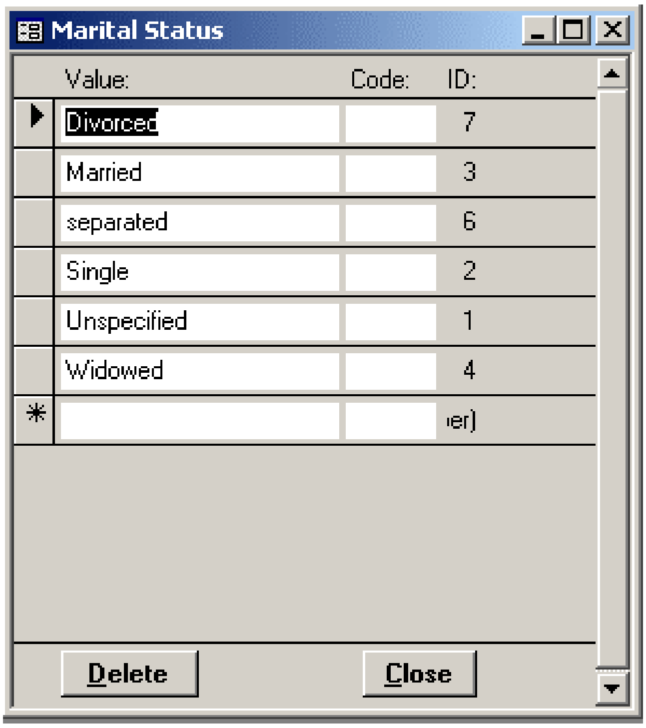
8 Configuration

All of the ReDIAL configuration functions are accessed from the Admin menu. It is recommended that only a small number of designated administrators are given access to this menu in the same way as only system administrators are given the rights to change certain items on a computer network. Many of the pull down lists can have their contents altered from the Admin menu so that ReDIAL can be configured for a range of advice services. In most cases the user interface that enables an administrator to change the contents of a list is the same. The user interface will be described once and all those functions that use the interface listed.

8.1 Changing the contents of a pull down list

8.1.1 Changing an existing entry

If the administrator were to click on the '**admin**' menu then on '**people**' and '**marital status'**, the window displayed would be similar to this:



This window is a view on to a database table inside ReDIAL. A description may be changed by a simple edit of the text, so for example, divorced could be changed to 'separated'. This would have the effect of changing the contents of the pull down list for marital status but also it is important to realise that all clients in the client database that were previously described as divorced will now be described as separated.

All these lists will contain an 'Unspecified' item, with an ID of 1. This list item cannot be removed or changed.

8.1.2 *Adding an Entry*

If it were decided to add another description of separated in addition to divorced, the cursor should be placed in the box adjacent to the * character and the mouse clicked once. The * will change to an arrow. Enter the desired text, say, ‘Separated’ then click on ‘Close’. The word Separated will now be added to the pull down list for marital status on the client screen, thus both divorced and separated will appear in the list.. It is always possible to add entries to a drop down list at any time.

> TIP: If you wish to add a new entry to an already open form, when you return to that form, press F9 to refresh all the data on that form. The new item should then be available in the appropriate drop down field.

8.1.3 *Deleting an Entry*

Imagine that it was subsequently decided that, rather than have both divorced and separated as descriptions of marital status, only separated was required. An administrator might attempt to delete the entry for divorced. This can be done by clicking the divorced box, see the arrow appear in the box to the left, then click delete. ReDIAL will ask you to confirm the deletion. This is where your problems start, if the database contains clients with the status ‘divorced’, ReDIAL needs to know what status to give them once ‘divorced’ is removed from it database. ReDIAL does this by presenting the user with this window:

At present if the reassign button is selected all those clients with marital status assigned to ‘divorced’ will be assigned to ‘unspecified’. In short, think carefully about how you will use ReDIAL and configure all the drop down lists before clients are entered on to the database.

This situation can occur in the address tables of Local Area and City/Town if a caseworker misspells a location and of course uses the location as part of the client address. In this case it is important that all clients with the miss-spelt area or town are searched for and their details noted before the miss-spelt area or town is deleted.

8.1.4 *Displaying an Entry*

In addition to the single field, some tables have an additional tick box labelled ‘show’. If there is a tick in this box, the corresponding item appears in the pull down list; if there is no tick in this box the corresponding item will not appear in the list when a caseworker pulls down the list to make a selection.

8.1.5 *Applicable Menus*

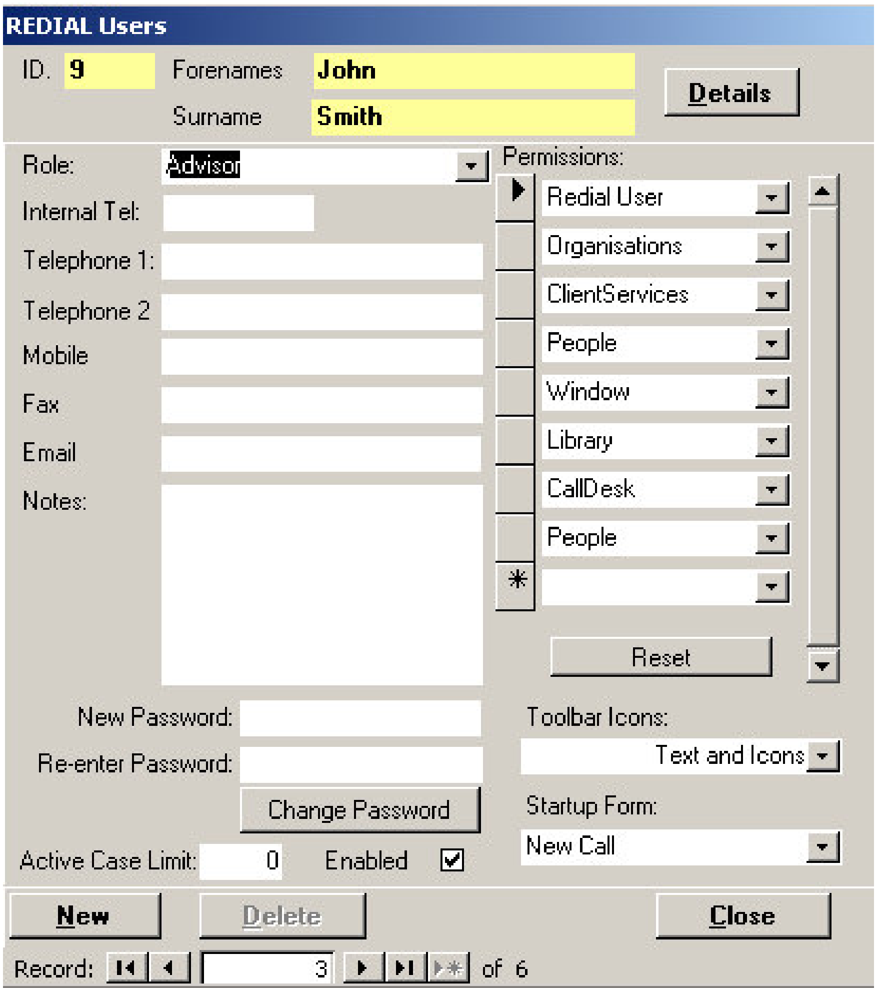
The menus which may be amended using the procedure set out in Section 8.1 are:

Menu	Submenu
People	Age, Ethnicity, Marital Status, Job Titles, Status, Person Types
Staff	Role
Benefits	Types, Groups, Sub Groups, Criteria, Rate Types
Other	Contact Method, Decisions, Interest Groups, Referral Reasons, Referral Types, Response Levels, Review Outcomes, Tasks.

8.2 Usernames & Passwords

Users may be added to ReDIAL via the Admin → Staff → Users menu. ReDIAL displays the following screen to the administrator. The screen enables:

- new users to be added,
- permissions allocated to the new user,
- password set,
- initial form set
- active case limit set
- an existing user to be prevented’ from using the system.



8.2.1 *Creating a New User*

Click the New button to create a new user. The administrator will be prompted to enter the user's forenames, then surname. Once these are entered, they will be stored in alphabetical order by surname with the other users. Use the arrow buttons at the bottom of the window to select the user whose name has just been entered. Once the name has been located they can be allocated the following attributes:

Role – select from the roles that have been configured on the system. Remember to configure roles before starting to enter users.

Telephone numbers, fax and email if required.

Password – Give all users a password. Remember all your client details are available to view on ReDIAL. Enter the same password in each box, then click 'Change Password'. ReDIAL will ask you to confirm that you want to change password. Passwords are not case sensitive in ReDIAL.

Active Case Limit – By allocating each user an active case limit the manager of an agency will be able to see at a glance which caseworkers are getting overloaded and which workers might have the time to take on new cases. When the limit is reached caseworkers can still take on new cases, the active case limit is for guide purposes only.

Enabled – There is a tick box marked enabled. When a caseworker is actively working for an agency this box should be ticked. Should a worker leave the agency this box should be changed to blank, this will stop the worker logging on to ReDIAL. A caseworker can not be deleted from ReDIAL for the same reason that it is difficult to delete marital status or any other information, ReDIAL would then need to know what to put in the 'caseworker' field for all the cases that the worker managed. It is also important for audit purposes that the original caseworker's name remains against all cases and enquiries that they handled.

Permissions

The permissions are related to the menu to which the user can have access. The table shows the relationship between the permission and the menu it gives access to. A caseworker without admin permission will simply not see the Admin menu on the screen. The table also shows suggested permissions for 3 classes of worker, caseworker, Information Officer and administrator. A tick mark indicates that the worker should be given that permission.

Permission	**Related Menu**	**Caseworker**	**Information Officer**	**Administrator**
ReDIAL User	ReDIAL user	✓	✓	✓
Calldesk	New Call	✓		✓
Client Services	Clients	✓		✓
Organisations	Organisations	✓	✓	✓
People	People	✓		✓
Library	Library	✓	✓	✓
Admin	Admin			✓
Window	Window			✓

Adding and Deleting Permissions

When a user is being set up on ReDIAL, a permission may be added by pulling down the list and selecting the required permission.

A permission may be deleted from a user's profile by clicking the box to the left of the permission name, the box should then contain an arrow, then strike the delete key or right click with the mouse then left click 'cut'

Permissions may be reset to the ReDIAL default by clicking on the 'reset' button. **It is of course very important that at least one user has access to the Admin menu to enable continued administration of**

the system. If you don't it's probably even more inconvenient than locking your keys in the car!!

Toolbar Icons

A user can be set up so that they see either icons for the usual functions of cut, paste, print etc or only the text menus above. Should the user subsequently decide to change their preference they can do so from the ReDIAL user→settings menu.

Startup Form

The form that the user first sees when they log on to ReDIAL can be set in this field. For most caseworkers this will be set to 'New Call' or 'Current Cases'. The user can change their own startup form using the

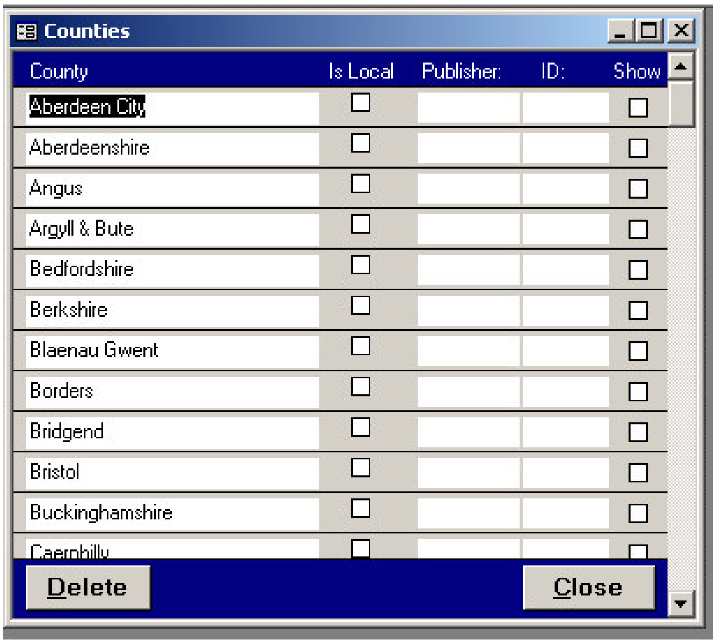
ReDIAL User → Settings menu

8.3 Configuring Areas, Counties & Towns

Configuring Areas, Counties and Towns merits a section of its own as there is some additional work required to relate a local area to its parent postal town and county. During the section of this guide on Case Recording it was pointed out that using a pull down list to select a local area would mean that ReDIAL would then complete the Town and County fields. This section will describe how to add areas, towns and counties and also how to relate them to each other.

8.3.1 Counties

Addresses are configured through the admin→addresses menu. It will be easiest to start with counties. ReDIAL contains a list of counties in the UK, here is the start of the list:



Show

The ‘show’ box has the same function as on other configuration menus; only if there is a tick present will the county appear in the pull down lists relating to client address. For an agency that operates mostly in a geographical area it is worth ticking only those counties that are served by the agency, clear the rest.

IsLocal

If the IsLocal box is ticked then it will ensure that when searching the organisation database, the counties with IsLocal ticked will appear at the head of the list of Counties.

Delete

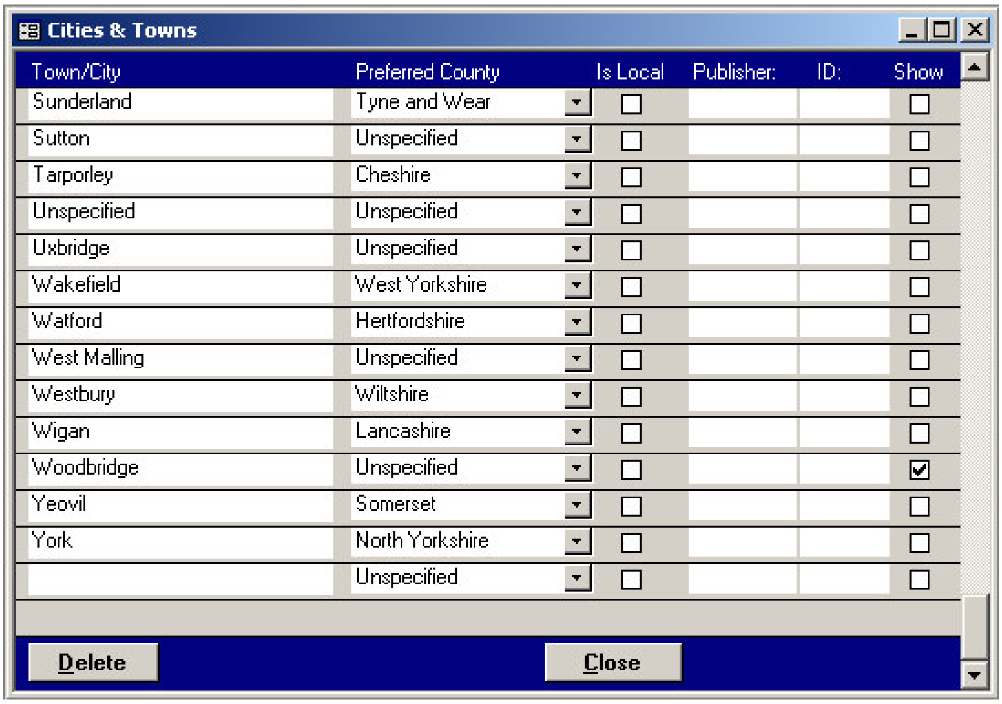
There is limited scope for deletion of counties as many counties will have organisations in the organisation database located there. If there is an organisation located in a county it will not be possible to delete it. It is suggested that no attempt is made to delete counties from ReDIAL.

Close

Once all changes have been made, the ‘Close’ button will save those changes before closing the window.

8.3.2 Towns

To set up Towns use the Admin→Addresses→Town/City menu. ReDIAL will present you with a screen listing all towns in ReDIAL in alphabetical order.



Town/City	Preferred County	Is Local	Publisher:	ID:	Show
Sunderland	Tyne and Wear	☐			☐
Sutton	Unspecified	☐			☐
Tarporley	Cheshire	☐			☐
Unspecified	Unspecified	☐			☐
Uxbridge	Unspecified	☐			☐
Wakefield	West Yorkshire	☐			☐
Watford	Hertfordshire	☐			☐
West Malling	Unspecified	☐			☐
Westbury	Wiltshire	☐			☐
Wigan	Lancashire	☐			☐
Woodbridge	Unspecified	☐			☑
Yeovil	Somerset	☐			☐
York	North Yorkshire	☐			☐
	Unspecified	☐			☐

If the agency serves a limited geographical area then, in order that caseworkers are not entering towns into ReDIAL at the same time as undertaking casework, it is advisable to make a list of local towns and load them into ReDIAL before it is used for casework. The list does not have to be exhaustive as Towns can always be added later. Once a reasonable list of towns has been gathered they can be entered by scrolling to the bottom of the Cities & Towns window.

Notice that there is a blank town window. Type the name of one of the towns from your list in the blank Town/City space, then pull down the list of counties and select the preferred County. Usually for local towns you will put a tick mark in both the 'IsLocal' box and the 'Show' box'. Use the TAB key to advance from field to field; once you have advanced past the last 'Show' box, ReDIAL will add another blank line to the bottom of the table for you to enter the next town in. Again the 'Close' button will save your changes before closing the window.

It is the selection of the County using the pull down list that enables ReDIAL to automatically add the County once the town has been entered in the client address field.

8.3.3 Local Areas

Local Areas are added in the same way as towns, the window used to enter local areas is identical to that used to enter towns. In the same way, once a local area has been entered, its parent town can be chosen from the pull down list.

8.3.4 Adding Areas and Towns

While speaking to a client a caseworker might take an address with a local area or Town that has not previously been entered on to ReDIAL. ReDIAL will ask the caseworker to confirm that they wish the Area or Town to be added to ReDIAL. If the caseworker confirms that the area or town is to be added, ReDIAL will include it in the database, however, it will not add the relationship between the area and its parent town and county. Periodically the ReDIAL administrator should look through the City/Town table and if there are any towns with a county marked 'unspecified' they should use the pull down list to associate the appropriate county. Similarly the administrator should associate any local areas with a town marked 'unspecified' with the correct post town.

8.4 Benefits Editor

The benefits editor is used to add or modify benefits. Once again, benefits should never be deleted from ReDIAL as old clients financial gain calculations will depend on older benefits remaining within the database. The benefits editor is activated from the admin→benefits menu selections.

The user is presented with the screen below which shows all the benefits on ReDIAL. The details of any benefit can be viewed by selecting the button next to the required benefit.

Importing Benefits

Should the benefits be radically revised by government, or where a group of agencies decide to co-operate on updating the benefits in all of their ReDIAL installations, the 'Import Benefits' button will enable an excel spreadsheet containing benefits, their attributes and amounts to be imported into ReDIAL. When a benefit update is defined in the spreadsheet it will add a closure date to the benefit rate already present in ReDIAL and update the benefit rate to the rate defined in the spreadsheet

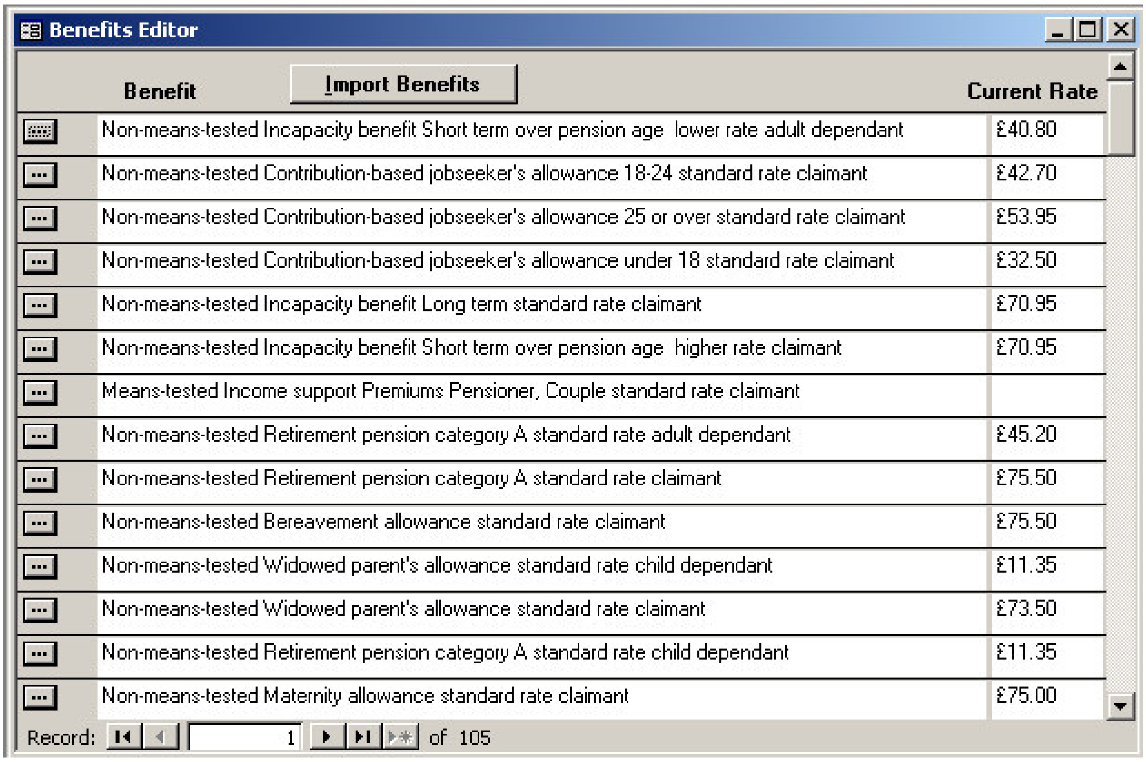


Figure 8-1 Benefits Editor Window

It is the Benefit Details window that is used to change a benefit. Each benefit is allocated a series of attributes using the pull down lists to the left of the window. The attributes are defined in the various benefit sub menus. So, for example, the different types of benefit group are defined in the Admin → Benefit → Benefit Group menu. Any of the attributes can be changed by a ReDIAL administrator should it be felt that the attributes supplied with ReDIAL do not align well with the agency's activities

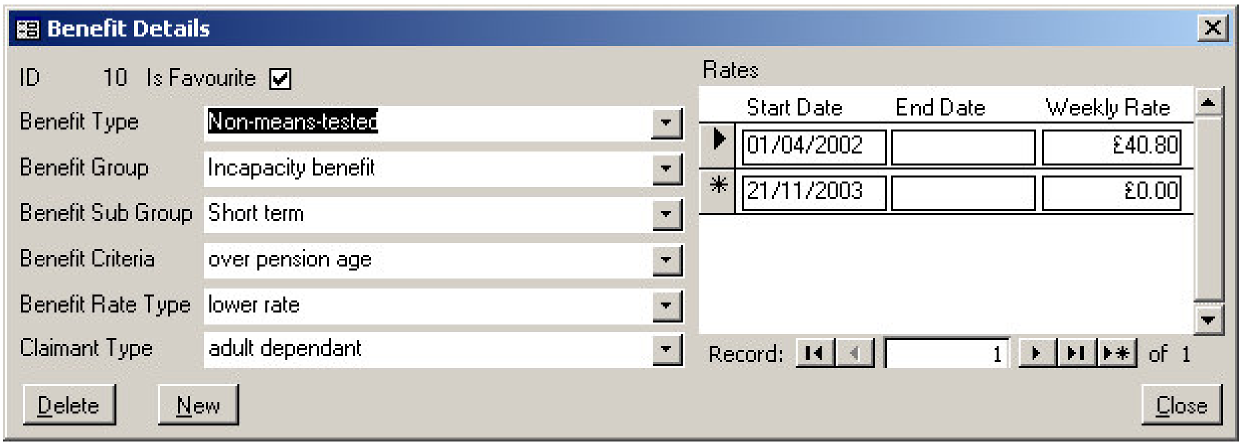


Figure 8-2 Benefits Details Window

The attributes are simply concatenated or strung together to form the complete description of a particular benefit. The way the attributes have been defined in the version of ReDIAL as supplied is nevertheless structured in such a way as to bring some structure to the benefits system. So the first major division is by means of benefit type, which may be 'means tested' or 'non means tested'. As the benefits system evolves, so will the system of classification. The overall aim of the attributes is to try and add some structure to the different benefits to make it easier for a caseworker to locate a particular benefit within ReDIAL.

The 'rate' part of the window is used to indicate the current rate for the benefit selected. Where a rate changes on a specific date, it is important not simply to edit the amount of the benefit, this would affect the financial gain calculations for all clients who had received the benefit in the past. The correct procedure is:

1. Enter the end date for the old benefit amount in the 'end date' box
2. Enter the start date for the new benefit amount in the next 'start date' box, normally this will be the day following the previous end date
3. Enter the new amount of the benefit
4. Click 'Close'.

The Benefit details window will then look like this:

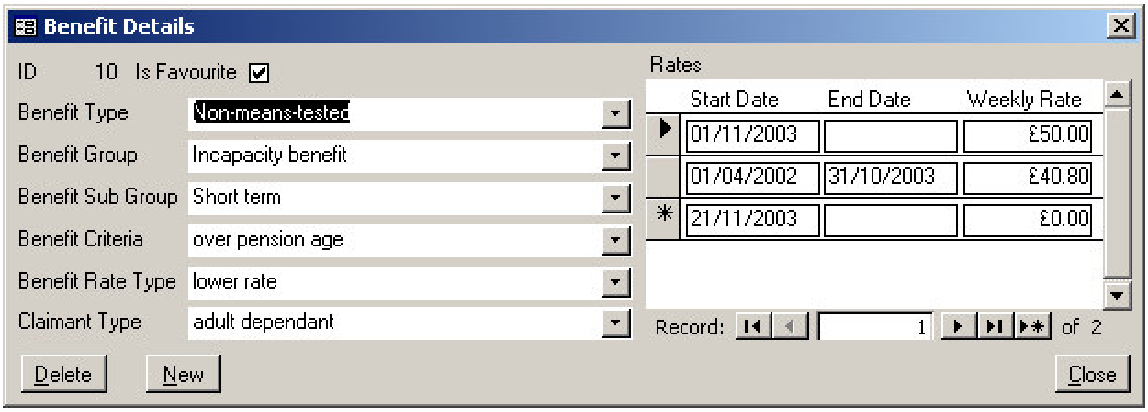


Figure 8-3 Amount of Benefit Changed from 1/11/2003

Creating a new benefit

Select the ‘New’ button and ReDIAL will display a Benefit details window with all the attribute fields left blank and the benefit rate left blank for the user to complete. When the benefit has been added the user should select the ‘Close’ button. ReDIAL will save the benefit entered before closing the window.

Deleting a Benefit

A benefit may be deleted from ReDIAL by selecting the ‘Delete’ button **a benefit may only be deleted if no clients have been awarded that benefit.** If a client has been awarded that benefit then ReDIAL will not allow the user to delete it and displays this window

8.5 Other (Category)

Under the Admin → Other menu are a variety of items that configure the pull down lists on the Client/Enquiry screens. The contents of the lists are amended using the procedure described in 8.1 Changing the contents of a pull down list. **The only sub menu that is different is the ‘Category’ menu.** The ‘Category’ sub-menu controls the pull down list of case categories on the green part of the Client/Enquiry screen. The categories are composed of two elements, the super category and sub category. So, for example, an agency advising clients with disabilities may have:

Super category: Benefits **Sub category:** Incapacity Benefit

These two elements are strung together to form the category:

‘Benefits:Incapacity Benefit’ shown in the pull down list.

This approach has been adopted to add structure to the way that the categories are formed. All the super categories and sub-categories may be amended at the discretion of the ReDIAL administrator and dependant on the type of work undertaken by the agency.

The category has two main functions:

1. Provision of structure in the case records for a client, and guidance of the caseworkers
2. Generation of reports on the proportion of different types of work undertaken by the agency

It is important that caseworkers are comfortable with the categories structure but that funding organisations, if they wish to see statistics regarding the service provided, are also happy with the categories used to generate the statistics.

TIP: As with all other entries in pull down lists, it is difficult to delete a category or a sub category once that category has been used on a client’s case records so it is worth thinking carefully about categories before ReDIAL is used for case recording.

Selection of Admin → Other → Categories causes ReDIAL to display the following screen

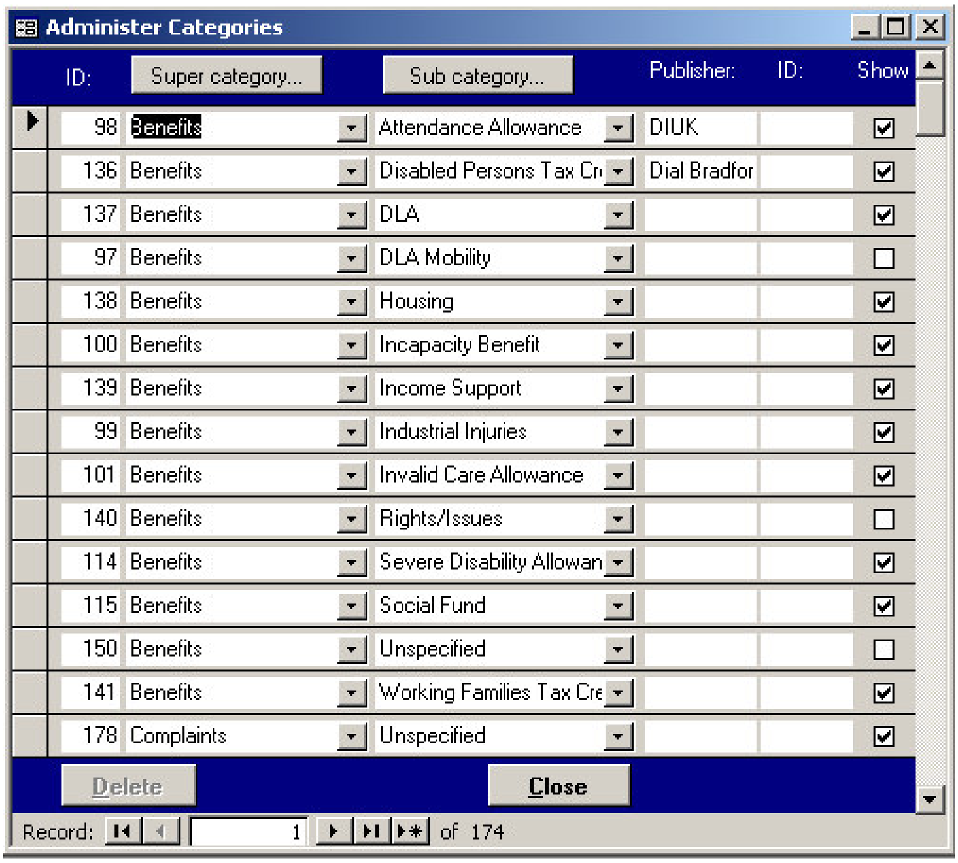
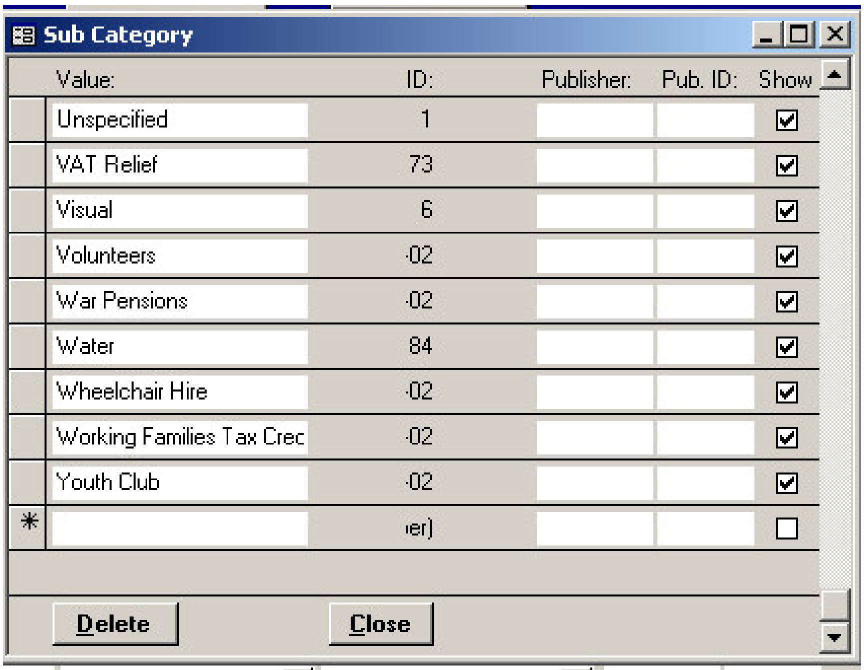


Figure 8-4 Administering Categories

The two buttons at the top of the window 'Super category…' and 'Sub category…' are used to amend items in each list. A left mouse click on the 'Sub category…' button will cause ReDIAL to display the sub category window:



At the bottom of the window is a blank value box. An additional sub category can be added to ReDIAL by typing its description in the box. If the new entry is to appear in the drop down lists then add a tick to the 'Show' tick box adjacent to your new entry. The publisher and publisher ID boxes are not used at this level.

The delete button is used to delete any entries that are not required. If a sub category has been used in any other place ReDIAL will ask you to reassign the dependent records to a different sub category. Under these circumstances it is better not to delete but to clear the tick box so that the sub category is not visible in any pull down lists.

TIP: During initial configuration of ReDIAL it is worth reviewing all the sub categories and either deleting or removing a tick from those sub categories that are not relevant to your agency.

Selecting the 'Close' button will cause ReDIAL to save any changes before closing the window.

The same process can be used to add or amend a super category, the windows and buttons are identical to those that appear in the sub category window.

Once any new categories and sub categories have been entered, the window shown in Figure 8-4 Administering Categories should be used to associate the new sub category with a super category. The administer categories window must be refreshed, by pressing F9, in order to add the new items. Scroll to the bottom of this window and Select the desired super category from the pull down list. Select the desired sub category from the pull down list and tick the 'Show' box if the combination of super and sub category is to be displayed in the client/enquiry pull down list.

8.6 Configuration

The system configuration sub menu contains only two sub menus:

- System Configuration
- Data File Location

8.6.1 System Configuration

On selection of System Configuration, ReDIAL will display the window shown in Figure 8-5. Some telephone advice agencies may be dealing with clients who are depressed at times or have some other condition that renders them anxious and, although they may have dialled the agency, when the phone is answered, they feel unable to speak. The agency concerned may have standard script to be read by the caseworker under these circumstances. If so the text of the script may be created and amended in this window.

In some versions of ReDIAL, the ‘New Call’ menu is configured with a ‘Silent caller’ button. When this button is selected the text in the window is displayed to the caseworker.

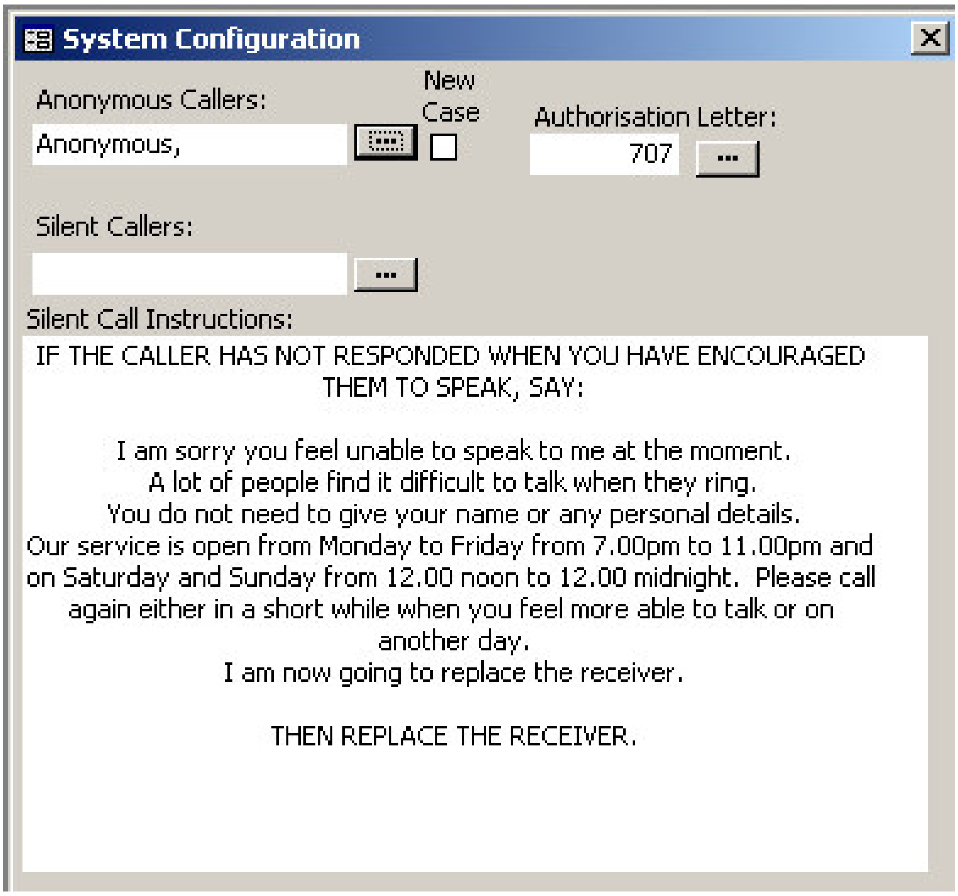


Figure 8-5 System Configuration Window

The fields for anonymous caller and silent caller are used to select a surname from the client database that will be used as a ‘standard’ surname against which an anonymous caller or silent caller will be logged.

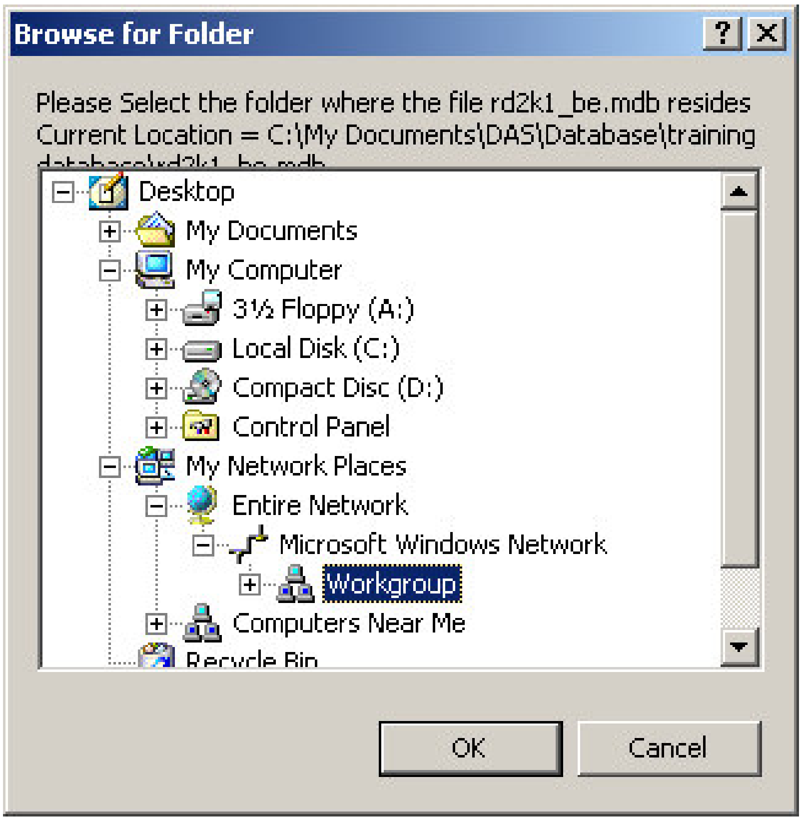
A mouse click on the ··· button will cause the search window for the person table to be displayed. Selecting a person will mean that all Anonymous/Silent calls are logged against this person (eg Ms Anonymous/Mr Silent)As default ReDIAL will log enquiries that the caseworker indicates are anonymous against the client surname of ‘anonymous’. This will save space, but will affect how your statistics are displayed.

New Case – If a tick is placed in the ‘New Case’ box, then every time an anonymous call is received, a new Case will be created against the surname chosen, each Case will have a single enquiry. If the ‘New Case’ box is not ticked then there will be a single Case created against the surname chosen with a new enquiry created every time an anonymous enquiry is logged.

– Most agencies have a standard authorisation letter that a client will sign to authorise the agency to act on behalf of the client. The ReDIAL administrators can use the button next to the window to browse the Standard Letters database and use the 'select' button to choose the standard authorisation letter to be used in the case letter page. On the case letters page there is a tick box named 'authorisation letter'; if a tick is placed in the box then the text of the selected authorisation letter will be inserted. The signatory will be automatically inserted as 'signed by client'..

8.6.2 Data File Location

This menu option displays the 'Browse for Folder' window that was used during the setup phase to choose the folder where the ReDIAL backend data file, rd2k1_be, is located.



This feature might be used if

1. A caseworker was to be trained on ReDIAL and it was advisable to use a training backend data file rather than one with live data in it. Under these circumstances it is very important to **remember to reconnect the front end to the live backend data file** before the adviser undertakes real casework. For the avoidance of any confusion it is suggested that the training database has special usernames and passwords such as 'training,one' 'training,two'. It is then entirely obvious if a caseworker is logging on to the training data file rather than the live one.

2. A computer network was restructured and a new server installed. If this is the case, the data store should be **copied not moved** to its new location, leaving the data store also in its old location on the network. The ReDIAL administrator can then log on to each copy of the ReDIAL front end in turn and change the data file to the new location. Only when all of the desktop machines have been successfully connected to the data file on the new server should the old data file be removed.

8.7 Data Management

After some use, some information in ReDIAL may contain errors. In many case this will be of no consequence, but for client and organisation names and addresses errors may cause problems if not found and remedied.

During normal usage, especially when the phones are ringing non-stop and caseworkers are in a real hurry, entries are made in the client/enquiry screen that it is later realised were made in error. Some of the most common errors are:

- Duplicate client name
- Mis-spelt Local Area added

8.7.1 Data Manager

The data manager is designed to help with the first of these 2 problems, it will help the ReDIAL administrator find either clients or organisations with duplicate names or duplicate post codes.

The appearance of the data manager window is shown in

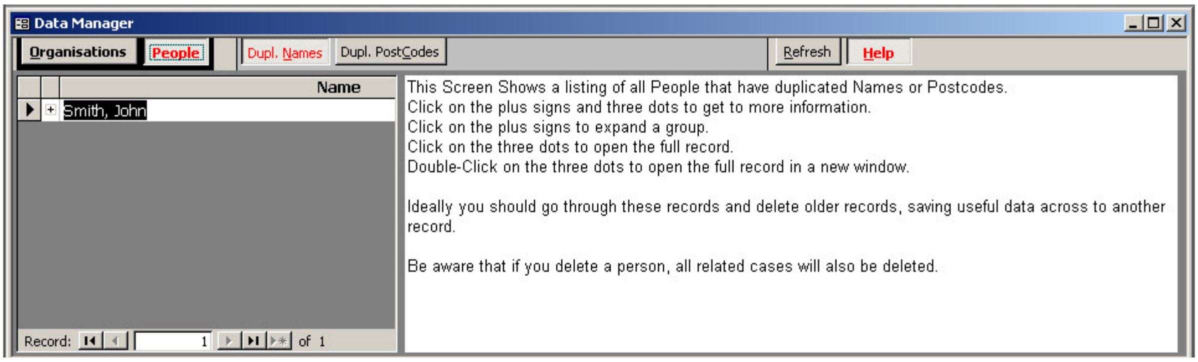


Figure 8-6 Data Manager

Selecting the database to search

The ‘People’ button will cause the data manager to search the client database, selecting the ‘Organisation’ button will cause the Data manager to search the organisation database.

Selecting the type of duplicate information

The ‘Dupl Names’ button will cause ReDIAL to search for duplicated surnames in the client database and for duplicate title in the organisation database. The ‘Dupl Postcodes’ button will cause the data manager to search for duplicated postcodes in the 2 databases respectively.

In Figure 8-6, the data manager is showing that there is more than 1 John Smith in the client list, click on the plus and the data manager will show that there are two John Smiths in this case. Against each Smith the is the usual which, if selected with a mouse click will show the client details screen. The administrator should check that these clients are different; if they are the same client entered twice then the ‘Move’ button on the client/enquiry screen can be used to move cases form one client to the other.

Another common cause of duplicate entries is where a surname has two phonetically similar spellings such as Shaw and Shore. In this case the data manager can be used to find clients with the same postcode and similar names. Once the administrator is convinced that the same client has been entered the procedure should be:

1. Move cases from the incorrectly spelt surname to the correctly spelt surname
2. Carefully check the case records for the correctly spelt name
3. Check there are no cases still associated with the incorrectly spelt surname
4. Check with the caseworker concerned
5. Delete the client with the incorrectly spelt surname.

If checks for duplicates are carried out at regular intervals it is easier to keep the client database accurate than if it is left unchecked for a year or two.

8.7.2 Incorrectly Spelt Local Areas

Similarly, though there are no tools to assist, it is worth the ReDIAL administrator checking the Local Area and City/Town tables occasionally for new and incorrect spellings. If any are detected, use the people menu and then pull down the list for Local Area or Town as appropriate. Find all clients associated with the incorrectly spelt Area or Town and note them.

Delete the incorrectly spelt Area or Town even though you may not reassign them. Then use the new call menu to search for the affected clients and pull down the correct Area or Town on the client details screen

9 Analysis

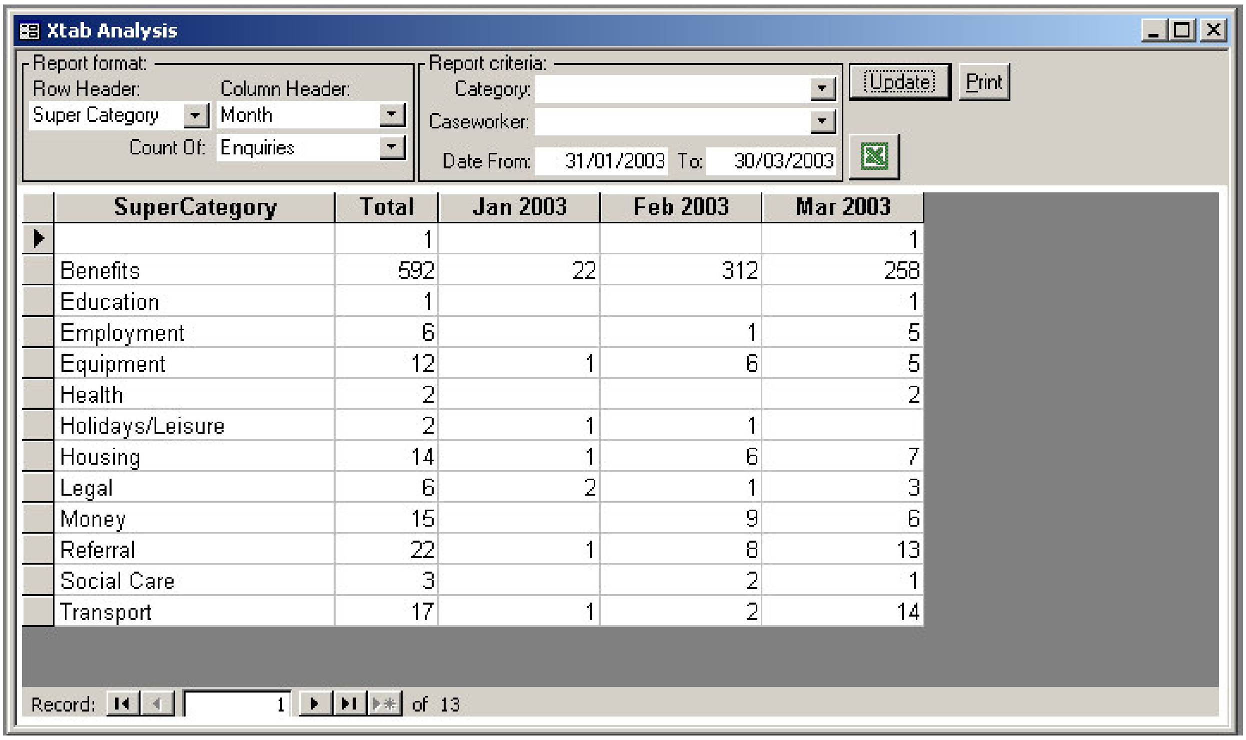
Statistics are required for two reasons:

- The management of the agency need to see how their time is being spent, how clients contact them, where clients live.
- Organisations who fund some agencies will wish to see that their grants are delivering value for money.

ReDIAL contains a comprehensive analysis function that will analyse the Agency's activities in a variety of ways and will also export the results of analysis to Excel for further analysis or inclusion in reports.

9.1 Analysis Screen

ReDIAL's analysis functions are accessed via the Admin→analysis menu. If this option is selected by the user the screen in Figure 9-1 is displayed.



SuperCategory	Total	Jan 2003	Feb 2003	Mar 2003
	1			1
Benefits	592	22	312	258
Education	1			1
Employment	6		1	5
Equipment	12	1	6	5
Health	2			2
Holidays/Leisure	2	1	1	
Housing	14	1	6	7
Legal	6	2	1	3
Money	15		9	6
Referral	22	1	8	13
Social Care	3		2	1
Transport	17	1	2	14

Figure 9-1 Analysis of Enquiries by Month

All analysis screens have a similar format. There are two areas at the top of the window, Report Format and Report Criteria.

9.1.1 Report Format

In this example the user has made selections as follows:

Row Header: Super Category

This is the super category from the client/enquiry screen. If sub category had been selected all possible categories would be displayed. For analysis of enquiries by geographical area, Area, Town or Post code can be used as the row header

Column Header: Month as shown this will analyse the data by month, with the from and to dates set in the 'Date From' and 'To' boxes

Count Of: Enquiries

The numbers in the table are the numbers of enquiries received each month in the different categories. In the screen shot, in the month of February, 312 enquiries were received regarding all types of benefit, but only 1 enquiry regarding employment. The number in the left hand column is the total across the row. Column totals are not produced in this screen but may be easily generated after the file is exported to Excel.

The count of list can be used to specify a count of:

Enquiries or cases	the number of enquiries or cases created in the month in question
Clients	the number of **new** clients in the month
Benefits awarded or claimed.	The **annual** amount of the benefits awarded or claimed in the month in question

9.1.2 Report Criteria

On the right of the screen are some additional criteria that can be selected, they are:

Category – if this list is pulled down, only the category displayed in the Category box will be listed in the report. In the screen shot in Figure 9-1, if the category list was pulled down so that 'benefit' was displayed, then only the first row of the report would be displayed in the table.

Caseworker: When the Analysis screen is first displayed the currently logged user is displayed in this box. Only cases in which the caseworker was involve are displayed. A double click in the box is required to delete the caseworker name in order to show all cases or enquiries

'Date From' and 'To': These fields specify the date to start the report and the date to finish. This will determine the column headers for the 'month' format, or act as a filter for other column headers

9.1.3 Buttons

Update After any change to the report format or criteria, the 'Update' button must be clicked to update the screen. When the format or criteria have been changed the caption on the update button turns red to indicate that it should be clicked to generate a report in accordance with the changes made to format or criteria.

Print Causes ReDIAL to open a print preview window so that the report may be previewed and, if required, sent to the default windows printer. The 'close' button in the print preview window is used to return to the ReDIAL analysis screen.

Export to Excel A click on the excel symbol will cause the ReDIAL report data to be exported to and excel spreadsheet. If this option is selected you will be prompted for a folder and a filename for your output.

10 Security Considerations

This section aims to offer some general advice about network reliability and data security. It can only offer an overview and you are strongly advised to use a consultant or knowledgeable volunteer to appraise your network and upgrade it if necessary. Once your organisation has started using ReDIAL for Case recording, client details, name, address, their enquiries plus letters written on their behalf are present on your computer or network. This means that your network must be designed so that it is:

- Reliable
- Secure against unauthorised access
- Protected against loss of data
- Protected against attack by viruses.

10.1.1 Reliability

Once an organisation starts using a computer for recording casework, if that computer breaks down then no casework recording can continue. In a networked office there may be several desktop machines available so if one breaks down there are others that can be used; however, there may be only one server so that if that fails, no desktop machines can used the ReDIAL system. Steps that can be taken to minimise the impact of failure are:

- Use a RAID disk system on the server to mirror all data on a 2nd disk drive so if one disc fails there is another disc ready to take over.
- For server machines, make sure you can quickly replace critical components such as a power supply, consider buying a spare, they are only about £20.
- Make sure that you can quickly buy a replacement network hub or switch.
- A ‘protecting’ mains lead extension, which smooths out the mains supply to the computer can make a significant difference to the stability and lifetime of a computer

10.1.2 Unauthorised Access

Unauthorised Access is possible either physically, with someone using the keyboard and computer or remotely via a connection to the Internet.

Physical Intrusion

It is good practice not to use shared usernames and passwords. There are several levels of access control to the ReDIAL data. It is recommended that whatever regime is used to control access to your computer or network, separate usernames and passwords are allocated within ReDIAL. ReDIAL automatically completes some fields with the name of the person logged on to ReDIAL; this will not work if a single username is used by more than one person.

Intrusion via the Internet.

This is more likely if you remain connected to the internet for any length of time. Some offices are connected via Broadband links and their network remains connected to the Internet for the entire working day. Under these circumstances it is **essential** that a firewall is used to guard against unauthorised access to your network. There are free firewalls available on the internet that can be downloaded and installed on your network.

10.1.3 Loss of Data

Once ReDIAL is used as the sole means of recording client enquiries, all your work resides in a single file, rd2k1_be. It is essential that your backup policy guards against loss or deletion of this file. Even if you have a RAID system installed in your server, deletion from one disk will result in its deletion from the mirrored drive. It is essential that a daily backup is taken of rd2k1_be. With a networked system this backup can either be to a removable media such as tape or CD, or to another disc on the network. Be aware that some backup systems do not back up any files that are in use so the file rd2k1_be will not be backed up if anyone is using ReDIAL or has failed to log off! It is often convenient to schedule a backup to occur during the evening or night time when there will be no-one using the computers.

As well as a backup to guard against accidental deletion of rd2k1_be, it is good practice to take another backup to guard against a disaster such as fire or flood at your office. This backup is taken on to removable media such as tape or CD and is stored at a separate location so that a fire at the office will not result in total loss of data. This backup may well be taken less frequently, but at least weekly.

10.1.4 Virus Attack

There has been a lot of publicity about viruses and even more written about how to avoid them. It is worth remembering that virus protection packages are upgraded to deal with a virus **after** the virus has appeared on the internet. Nevertheless, buy a virus detection tool and keep it up to date, but just as important, don't open any suspicious attachments, even from people you know as many viruses spread by stealing names from victims' address books.

It is also necessary to keep virus definitions up to date, most virus software includes a capability to upgrade virus definitions over the internet at regular intervals. This feature should be enabled, or a procedure followed to ensure that manual updates take place at regular intervals.

11 Troubleshooting

11.1 Login screen has no usernames

Occasionally the ReDIAL login screen appears with no user names available for selection. There are several possible reasons for this:

1. The connection with the data file has been lost
2. The front end database has become corrupted
3. The backend data file has become corrupted.
4. The datafile has been moved

Connection to data file

From the desktop computer where the problem is, try to browse to the server computer folder where the data file is located using network neighbourhood or any shortcuts that you might have. You should be able to see the data file rd2k1_be. If you can't see the folder or file, suspect network or server problems

The front end database has become corrupted

Re-install the front end database on the local computer.

The backend data file has been corrupted.

Using any computer with MS Access installed, browse to the folder where the backend data file is installed. Double click on rd2k1_be.mdb. Go to tools → database utilities → Compact and Repair Database. Then exit Access and try to use ReDIAL from a desktop computer.

The data file has been moved

If it is possible to browse to the correct folder but the data file rd2k1_be is not visible, has it been moved for some reason or its protection/security settings may have been changed.

11.2 Invalid Date entered

When entering a date of birth for a client in the client/enquiry or client details screen the following error box may appear.

This indicates that a 2 digit date has been entered instead of a 4 digit date
e.g. 02 instead of 2002.

11.3 Database repair

Front end Application

To avoid problems with database corruption on the front end ReDIAL application it is recommended that, after installation the database is configured to compact and repair itself automatically each time the ReDIAL user exits. This may be done very simple by going to the

Tools → options menu

select the general tab and tick the box 'compact on close' and OK.

Backend Data Store

ReDIAL may be installed on a computer with a standalone version of Microsoft Access already installed as a part of Microsoft Office. Alternatively, if there is no standalone version of Access installed, ReDIAL will install a runtime version during its installation process.

With a standalone version of Access available

For the backend data file in a networked installation this is more tricky as no user ever directly accesses the data file. It is recommended that every 2 weeks the ReDIAL administrator browses to the backend data file, double clicks on rd2k1_be and then goes to the tools → database utilities menu and selects compact and repair database.

The same effect can be achieved by selecting the 'compact on close' tick box as described above. Then all that is necessary is to double click on rd2k1_be wait for the database to open then click file → exit when the database will be compacted.

With Only the runtime version of access

If only the runtime version of Access was installed from the ReDIAL Installation CD, the datastore can't be opened outside the ReDIAL application. The result of a database corruption is often that the login screen contains no usernames so that it is not possible to log in to the ReDIAL application either. When this is the case it is possible to compact and repair the ReDIAL data Store from a command line.

Click start, then run

Windows 95 or 98 - type command into the box and click OK,

Windows 2000 or XP – type cmd into the box and click OK

In both cases you should see a black command window. You will need to know the path to the folders containing the runtime version of access and the ReDIAL Backend data Store. Type the command:

"c:\program files\<path to access.exe>\MSAccess.exe" "c:\my documents\<path to datastore>\rd2k1_be.mdb" /compact

eg "c:\program files\microsoft office\ART\office\MSAccess.exe" "c:\my documents\DAS\database\suffolk config\rd2k1_be.mdb" /compact

This command can be inserted into a batch file, stored on the server, so that the path names do not have to be remembered then run at regular intervals; perhaps prior to a weekly backup when no–one is using ReDIAL. Alternatively the batch file can be set to run automatically at night time as a scheduled job.

INDEX

BradSoft

Bradsoft
P.O. Box 1000,
Shipley
West Yorkshire
BD17 7YQ
Telephone 01274 588440

Email: info@bradsoft.tele2.co.uk

www.bradsoft.co.uk

The ReDIAL support and discussion area is available
At our web site, where regular software updates can also be downloaded

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