**Outline Training script – Welcome Centre**

**Slide Deck**

## **Slide 1 & 2 – Welcome and outline of the training**

* See Slide notes

**Slide 3 - What is the purpose and benefits of the Data Platform?**

* See Slide Notes

**Slide 4 - Access and Data**

* See Slide Notes

**Slide 5 – Overview of Super Sponsor Route**

* See Slide Notes

**Slide 6 – Summary of Roles and Responsibilities**

* See Slide Notes

**Slide 7 – Overview of Individual Sponsor Route**

* See Slide Notes

**Slide 8 - Overview of Individual Sponsor Route**

* See Slide Notes

**Slide 9 - Supporting Users to get started**

* See Slide Notes

**Slide 10 – Introducing the family**

* See Slide Notes
* You will need to create training records if you wish to follow a user journey to help with the training. You do not need to copy our scenario but we have left it in, in case it is helpful.
* You will also need to create or identify an individual who can join the household ID in the demo.

**Slide 11 – Technical Support and Feedback**

* See Slide Notes

**Slide 10 – Transition Slide**

* You can now access the system and start to demo the system.
* Depending on the time you have to train your colleagues, you can ask colleagues to completed small exercises to embed their training ideas. We have included some ideas below.

**DEMO: Using the System**

**Quick look at navigation**

* When you first log into the system you may be presented with a landing page.
* Click on the application you wish to open.
* There will be a check box to remove that landing page if you want to go straight into the system.

**Top Tool Bar**

* Lots of functions but only likely to use a few of these [point these out on the screen]
* **Go Back** Takes you back to your previous screen
* **Save** – save the changes made.
* **Save and close** - saves changes made and takes you back to the screen you were working on previously.
* **Refresh** – sometimes changes don’t instantly appear after saving. Re-fresh, to show the updated record.
* If you can’t remember what the icons mean, just hover over and a tooltip label will appear.
* **Vitally important that you save any changes before moving to the next screen otherwise changes may be lost.**

**Moving down to system views**

The system will have a couple of system views produced but you can select one and then fine tune it so it meets your needs.

**Demonstration:**

* Select a system view (either individual route showing sponsor or welcome centre).
* **Add the DoB field** and **removing middle name column** (click Apply)
* Click on ‘Create a view’ button drop down arrow ( in top navigation) to ‘save as a new view’. The drop-down button only appears when a filter has been applied or columns changed.
* Change name of the view. Description is optional.
* Click save
* Show how that saves in ‘My View’

Graphical user interface, text, application, email

Description automatically generated

**Demonstration:**You can use filters to further refine your view/report. This way is great if you have quite a few filters to add.

* Select a system view (either individual route showing sponsor or welcome centre view).
* Click Edit Filter
* Click Add to add new filters (Date of Birth for example)
* Show that if you want to delete a filter – use the 3 dots by the side of the line.
* click apply

if you only need to apply 1 or 2 filters, you can filter in the main screen using the drop-down arrows next to the column title and select ‘filter by’.

**Export to excel**

* Show the location of the ‘export to excel’ button (top navigation)
* Useful if individuals need to extract data from the system for reporting.
* Some of the data fields and the order they appear may differ to those currently provided via Objective Connect.
* The system will link to PowerBi at some point in the future.

**Main system sections**

**The system enables you to view records as a household and individually.**

**Applicants**

* Lists all individuals that have been granted right to travel and have received their Visa on either scheme.
* Data comes from Home Office, is cleaned, and uploaded by Welsh Government.
* Data will be uploaded every morning so you will have instant access to the most up to date records.
* Using the Applicant Screen is the best way to access and amend individual records.
* Whilst it shows that you can create a ‘new record’ this is highly unlikely to be used as data will be uploaded centrally. If it is used, please let the data team in Welsh Government know as when the data is imported, there will be an increased risk of duplicate records.

**Households**

* List of groups travelling together.
* A Fam ID and a Household ID are the same thing but we have called it a Household ID in the system to acknowledge that those travelling within a group may not all be related.
* Here you can bulk update records and create whole household placement records.

**Sponsor**

* Lists all individuals that have offered to house a family or individual (referred to as a household in training) from Ukraine through the individual sponsor route
* Remember there is no EoI data in the data platform.

**Sponsor** **Household**

* Lists individuals that live with the Sponsor at the time of their application, for example daughter/son/partner.
* Useful if you need to run CRB checks against any individuals within the house before placing another individual with the same sponsor.

**Finding people on the system**

*Scenario  
  
Yulia and the girls have been in contact with the Contact centre since landing in the UK and making their way to Wales. The travel hub has confirmed they are on their way to the Welcome Centre and the contact centre has moved their status to SS05 – in transit and allocated the welcome centre in the summary page. This ensures you will be able to see their record when they arrive.*

*As they arrive, contact centre confirm arrival with the individual via phone and the status is moved to SS07. And here are Yulia, Natalya and Sofia tired and emotional, walking through the door.*

*We need to find them on the system.*

**Demo**:

* Searching can be done in several ways. You can filter by status for example IS or SS journey status but, in this instance, I am going to search by name
* Click on Applicant Screen > select your preferred system view
* Search for your training record
* Double click on the record*.* Note that anything blue and underlined is a hyperlink off to another record. FAM ID for example.

**Looking at info in a record**

* **Talk through what you can find in additional tabs of an individual record.**

**Summary** – an overview of the individual record. From here you can check whether the individual is the lead applicant, their journey status and relationship to others

**Personal** – An in-depth record of contact and personal details. Whilst the contact centre will have completed many of these, those supporting the Individual Sponsor Scheme will find the sponsor fields in this window

**Case Notes and Activities** – will show all the case notes and activities recorded under an individual record.

**Placement tracking –** enables you to create a new placement tracking record and also see a summary of those have been made in the past.

**Related** – includes Audit info, if you have access, which shows all changes made to a record.

**Undertaking and recording checks**

***Scenario***

***We have found Yulia and her children on the system. We can begin to undertake the necessary checks.***

***First, let’s imagine we have completed their initial ‘check in’ checklist at the   
Welcome Centre or their Welfare Check if on the Individual Sponsor Route.***

There are two places where you will need to update case notes and activities.

1) Check Box and

2) Case Notes & Activities

* *[show location of the check box]*
* *The names of the checks are being worked on. For now imagine these read check 1, check 2 etc. Using these check boxes will enable you to report on what checks have completed.*
* *[show case notes area on screen] Here we can record case notes and other information as necessary.*

You can update this anyway you wish but feedback from welcome centres was that they would like check lists build into the system. At the moment, the check lists are not built in, so they need to be updated in the system manually. Check list contents (at this stage) are outlined in the user guide.

Provide some tips when adding case notes/activities

* Provide as much detail as possible BUT do not include any health/sensitive information
* Do not delete a record unless it has been added in error. You can annotate that anything in a case note has been completed or if a task or appointment has been added, you can mark as complete using to tick icon which appears when you hover over a record.
* You can create a Task but you are not able to assign tasks to other team members.

You can update your own case notes but not other peoples.

**Demo:**

**If using a Super Sponsor Route:**

* Paste the following into the case note using title ‘Initial Check-in’ Add the name of the welcome centre and your initials.
* Meet any immediate needs (medical, essential supplies). If any medical needs, contact healthcare team or 111 if further advice needed.
* Offer Covid test (not compulsory but advised). If positive, alert healthcare worker.
* Allocate room.
* Provide a Welcome Centre information pack and tour of facilities.
* Ensure that you complete the appropriate check boxes as well.

**If using an Individual Sponsor Scheme Scenario**

* Create a case note providing typical info gathered as part of a welfare check.
* Reference the checks and say that Individual Sponsor Route Checks are in the process of being finalised.
* Ensure that you complete the appropriate check boxes as well.

**Create a placement record**

A placement record logs information about where they are, address, dates and other useful info.

***Scenario***

***As Yulia and the girls are being accommodated in the Welcome Centre they all need to have their records updated.***

***It would be the same if an individual were being placed at a sponsor home or temporary accommodation.***

***Placement records can be created at household level*. If you need to create a different placement record for an individual (such as hospital stay) you will need to split the household apart.**

**Demo:**

* Double click on the FAM ID from applicant home screen > select placement tracking.
* Do not add an individual name if creating a placement record for the whole household.
* Change Placement Type using the drop down and select Welcome Centre or Host Accommodation
* Complete Date started
* Leave date ended until that placement has ended i.e. when they are moved to permanent accommodation.

**If using a Welcome Centre Scenario**

* Ensure correct Welcome Centre is in the Allocated Welcome Centre field [if appropriate]
* Go into each individual record and Add room number/name of room in Welcome Centre within the address field so the system
* Point out that you do not need to complete ‘Move On Reason’ field until you close a placement record.

**If using an Individual Sponsor Scheme Scenario**  
Complete the address field for their new accommodation.

* Point out that you do not need to complete ‘Move On Reason’ field until you close a placement record.

**Undertaking and recording checks – part 2**

***Scenario***  
  
***Yulia and the girls had a settled 1st night, and they now need additional support to put in place any health appointments and to start to get some financial support.***

**Demo:**

**If Using a Welcome Centre Scenario**

Adding 2nd stage checklist & 3rd stage checklist

**2nd stage checklist** is where a welcome centre starts to involve partners as such as LHB and Local authority colleagues.

* create further case notes to capture progress with this. Paste in the check list below
* Book individual/family health appointment with health team.
* Refer for DWP support.
* Refer to casework team if immediate financial support is required.
* Offer new mobile SIM card if required.
* If updating a mobile number – add to the summary screen.[note that field name will change to show preferred contact number]
* Show that in personal details there are secondary phone numbers included where needed.

**3rd stage checklist**

* Paste in the 3rd Stage checklist below explaining that some of this work has started so the record is added so it can be updated as things are completed. only the creator of the record can update it
* Assistance offered to open a bank account.
* Offer ESOL language classes.
* Arrange attendance at cultural briefing session.
* Adults: refer to Working Wales for employment/ training support   
  Children: Arrange immediate education and early years provision
* Signpost to biometric data registration with Home Office
* Check accommodation needs have not changed.

**If using an Individual Sponsor Scheme Scenario**

You can skip this part of the demo as it will replicate adding case notes and check lists. If you have a follow-on appointment or discussion that usually happens after the welfare check, you could use that as another example to further embed learning.

**Changing members of a Household ID**

*Scenario*

*In the time that Yulia and the girls have been in the Welcome Centre, they have made a friend called Lena Bilyk and have agreed that they wish to be housed together when everyone is ready.*

*If an individual sponsor route, you may wish to change this scenario to show two friends that travelled separately now wish to be housed together.*

**Demo:**

* We need to make changes to the household group. You cannot create a group with two lead applicants; however the system does allow a household of one (who is by default the lead applicant) to join another group with a lead applicant.
* Open the household ID group the person wishes to join
* action > add applicant [select one you have identified or created]
* add action comment if appropriate
* update the household housing need record to reflect the changes.
* show that on the individual’s case notes, it shows they have joined a new household.

**Changing Group Records**

*Scenario*

*Now that all of Yulia’s, Lina’s, Natalia and Sofia’s checks have been made and everyone has the support mechanisms in place. The Welcome centre will need to update their status to SS08. This signals that everything is in place as soon as accommodation is found, and local authorities can start to match housing need against accommodation.*

**Demo:**

**If using a Welcome Centre Scenario**

The are some fields which you might need to update for the whole family, such as SS status.

* Double click on the Applicant Household ID (FAM#)
* Select grouped applicants using the check box against each record
* Click on Edit
* Update the SS status or other appropriate field.

You can check this has worked by going to one of the individual’s records.

**If using an Individual Sponsor Scheme Scenario**

* Double click on the Applicant Household ID (FAM#)
* Select grouped applicants using the check box against each record
* Click on Edit
* Update the IS status or another appropriate field.

**Checking Housing Needs**

**Scenario***To ensure Yulia and her children are accommodated in the right type of housing we need to check her accommodation needs have been captured accurately and have not changed. Initial Housing Needs are captured by the contact centre.*

*We know situation has changed so this is great timing!*

**Demo:**

**Check housing need**

* Changing a Housing Need will update for the whole household
* Again be careful about info captured, for example they may need wheelchair access but do not add specifics about why.
* Check Household Housing Need.
* Double click on the lead applicant record from within the applicant home screen.
* Click on Fam ID > linked housing need
* Add an extra bed and an extra bedroom for Lina
* Completed fields as required. Those marked with a red \* are mandatory

Lina now has an orphaned housing need record (from when she was a household of one) so that will need to be deleted. There is a limited number of people that can delete records so email [WNSManagement@cardiff.gov.uk](mailto:WNSManagement@cardiff.gov.uk) including the Housing Need reference and they will review and delete.

**Create a New Housing Need**

This may be required where someone has had a relationship breakdown with the host they travelled to stay with and need to find a new one or they have travelled with a family but want to be housed separately.

* Go to household record (by clicking the FAM or WG ID on the individual record)
* Click on the Linked housing need field
* Select new housing need from bottom of the drop-down list
* Complete form
  + Housing need ID automatically generated
  + Complete fields as appropriate.
* Click save and the Housing ID will be saved automatically (HN-XXXX)
* Copy the housing Need ID and go back to the household record
* Paste the housing ID (HN-XXXX) into the Linked Housing Need field and save.

**To link**

**Accommodation has been allocated**

*Scenario*

Some time has passed but great news!, *Yulia, Lina, Natalia and Sofie have been offered a house to move into but it is in Bridgend rather than Cardiff.*

***Demo:***

Show status change to SS09 and update case notes to reflect the changes.

**Demo:**

We need to update the status, close the existing placement record and create another placement record.

**Closing Placement Records**

*Scenario*

*It’s moving day! The family are all packed up and heading off to their new home in Bridgend.*

**Demo:**

We need to update the status to SS10, close the existing placement record and create another placement record which shows the address for placement etc.

**Be warned**. If you need to reassign the record to a different local authority – you will no longer have access once it is saved and the new local authority has been selected, so ensure you have done everything required on the record before changing the LA and saving.

**Update Group status to SS10 or IS03**

* Open your training record and double click on ‘Household ID’
* Scroll down to applicant table (showing everyone in the household)
* Select the applicant records that you want to update by using the first column to tick the record
* Select edit
* Update to SS10 or IS04
* save

**Close the existing placement record**

* Open your training record
* Click placement tracking tab
* Open the existing record
* Add end date and move on reason
* Save

**Create a new placement record**

* Open your training record
* Click placement tracking tab
* Click on new placement tracking
* Update details incl address of new property
* updating placement tracking is for the individual not the household, so it will need to repeat for each person.
* Remind colleagues that if the person is moving to a different local authority they will need to change that within the placement record and the record would then go from their system view. That is because views are defined by security settings and current data policy does not allow people to see records for other local authority areas.

**Managing Changes in Circumstances**

If there are changes to an individual’s circumstances as they arrive or during their stay, it is important that these are updated on the system. Some of these may include:

* relationship breakdown / no longer wish to be housed with those they travelled with
* Temporary placement away from the family, such as a hospital.

In either of those examples you need to split the Household Group (as defined by the Household ID) apart on the system.

* When splitting a household ID apart, it is important that you remember to:

a) change the lead applicant within a group if the existing lead applicant is leaving.

b) assign a new lead applicant to the existing group, if necessary

c) create a housing need for the group member(s) that are going separate ways

d) update the original group housing need.

* It is imperative that each has a lead applicant. it will usually be included with the contact centre info but if not, someone will need to identify a lead for each household.
* If the person, separating from the house is the lead applicant, you will need to reassign the lead applicant role before you move them from the household.

**Changing Lead Applicant**

**Demo:**

* Open your training record
* Go to the Household ID and click to open the record
* Next to action, select set lead applicant
* Select applicant by clicking into box and hit return
* add an action comment if helpful
* check change in the applicants group window.

**Splitting a household apart**

* Go to the Household ID >general tab
* Next to action, select remove applicant to new household
* add the name of the applicant you wish to move v- hit enter and it will only bring up the names of those within the group
* Optional whether you want to add reason
* click save.
* he now has a WG reference (as the change was made after the dta upload).
* Now create the individual housing record
* remember to update the original household ID to reflect the changes to their requirements as well.

You would also need to do this if a member of a larger household was being placed away from the family for a temporary period, such as a stay in hospital.

**Individual moves to hospital**

* Ensure the individual moving to hospital is not sharing a household with anyone. If they are, you will need to split them apart.
* Create a new placement record for the individual (see above for process)
* Selecting hospital from the placement type drop down.
* Add in as much information as possible within the address field incl Ward if known.
* Add in dates
* Do not include any medical information on the system.
* Keep their status as housed in the welcome centre
* Their welcome centre allocation on the summary page remains the same.
* Add a case note to say individual transferred to hospital.

**SPONSORS**

The Sponsor table shows individuals who are sponsoring a family/individual from Ukraine through the Individual Sponsor Route.

Navigation through records is the same in the application screen.

Data will be uploaded every morning so those working on the individual sponsor route will be able track progress fo checks and progress of their application to be a host.

**Demo:**

Talk through the screens

|  |  |
| --- | --- |
| Summary | Enables you to **track sponsor status from** when they apply to when they are active (also includes withdrawn and rejected incl a field to record reason) **Add Case Notes and activities** for the Sponsor to track application checks etc.  You can also **add payment details** for info and cross reference purposes. The system will not link to the finance system. |
| Placement Tracking | Will show placement tracking for individuals who will be housed with the Sponsor |
| Host Addresses | List all the available addresses that a Sponsor has been approved to house applicants who have applied via the Individual Sponsor Route in. |
| Sponsor Household | Shows individuals that live with Sponsor at the time of application. |
| Applicants | Shows individuals that have listed the sponsor on their Individual Sponsor Scheme application |
| Related | This tab shows audit history which tracks all changes made on an individual record and Applications of those applying to be hosted by sponsor. |

**Demo:**

How to change Status Code in the Summary Tab

Definitions of Status Codes are

|  |  |
| --- | --- |
| HST001 – Applied | Sponsor has applied but not yet been approved. Local Authorities can start to undertake house checks, DBS checks etc |
| HST002 – Approved | All required checks have been completed and successful. The sponsor can accept visitors |
| HST003 – Active | Sponsor has one or more people placed in the accommodation offered. Sponsor can start to receive monthly monetary contribution |
| HST004 – Withdrawn | Sponsor no longer wishes to offer accommodation |
| HST005 – Rejected | Application has been rejected. There will be an additional field below status to capture the reason why a Host application has been rejected. |

**Case Notes**

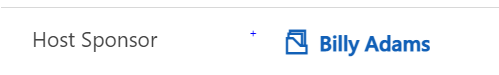
As you will have covered updating Case Notes in the training already, you can briefly mention that they can be used to record discussions and updates on the Sponsor application. Again, no sensitive or health information should be included.

**Placement Trackings**

Will show any individuals who are being sponsored by a Sponsor. The placement record would be created against an individual but will show here once the sponsor is active and an applicant has been linked with the sponsor in the system.

**Demo:**1) Identify an Individual Sponsor Scheme applicant

2) Create a placement record and link them to a sponsor for example



3) Save the placement record

4) Open the Sponsor record to show the applicant placement record within placement tracking tab.

**Sponsor Household**No Demo required.

Shows individuals living with a sponsor at the time an application is submitted. Helpful to identify individuals that may need to have CRB checks and to determine the level of check required.

**Related Tab**

**Applications**

Shows all individuals that have included them as the sponsor on their application.

**Audit History**

Shows all changes to the Sponsor record, what was changed and by whom ( as much as system can track those changes)