Database Notes

Accounts and Logins

~~-For users, can we use email addresses in place of usernames? This will make it much easier to remember login information.~~

~~-Admins need the ability to change passwords for other users.~~

~~-Admins need ability to change ‘Referrer Details’ in the Membership pages. One of the main reasons will be so that we can enter referrals that we have received on paper.~~

~~-Please change the name of the ‘Agent’ category to ‘~~~~Referrer’~~

Membership form

Applicant Details

~~-Change ‘Create’ title at the top to ‘~~~~Referral Form’~~

- Date of Birth calendar only goes back to 2004

~~- Tab order should be changed so that address info is completed together~~

- In the Applicant Details section I got an “invalid format” error message in the Home Tel. Section

~~- In the Applicant Details section, the email address box needs to be changed from ‘required’ to optional, as not all service users will have an email address.~~

Referrer Details

~~-Instead of username,~~ ~~Referrer’s full name should be displayed~~

~~-‘Relationship’ to be changed to ‘Relationship~~ ~~to client/patient’~~

The Referral Process

~~-Move ‘The Referral Process’ to the end of the page~~

~~-Change ‘The Referral Process’ title to ‘~~~~What Happens Next’~~

~~-Replace text with the following, complete with bullet points please!~~

* ~~Once this form is completed and we’ve been given the necessary paperwork, SMART then contacts you to arrange an induction.~~
* ~~You then contact your client to inform them about the induction.~~
* ~~You and your client attend the induction meeting at SMART.~~
* ~~During the induction, we discuss with the client/patient how SMART can help with the recovery, health and wellbeing, and then they make decisions about which project(s) they would like to do. At the end we have a tour of SMART and meet the rest of the staff.~~
* ~~Following the meeting, the new member receives a Member Handbook and Welcome Letter with the start dates of their projects~~
* ~~6 Weeks after the induction, the new member meets with SMART staff for a Member Review to ensure their needs are being met and give feedback on their progress so far.~~
* ~~Throughout your client’s time at SMART, we will be on hand to provide information about their progression and wellbeing. And should we have any concerns we will contact you for advice and guidance.~~
* ~~Thank you for completing this form. We look forward to working with you and your client.~~

Other Contacts

-Could the Name, Address and Tel no’s sections be made as default unless the checkbox that says ‘Please tick here if the applicant does not have a....’ is checked?

- ~~For the ‘Other’ part, please replace the ‘Please specify: ---------------‘ with a text box~~

About your Client/Patient

~~-In the ‘~~~~About your Client/Patient’ can you change questions 4-6 with this text please?~~

~~4. Is the applicant subject to the Care Programme Approach?~~

*~~if yes, please~~* *~~provide a copy of the most recent CPA~~*

~~5. Is the applicant eligible for Care Management?~~

*~~if yes, please provide the most recent~~* *~~FACS assessment~~*

~~6. Has a Risk Assessment been carried out in the last 12 months?~~

*~~if yes,~~* *~~provide enclose a copy of the risk assessme~~**~~nt~~*

*~~Please note: We are unable to accept referrals without a Risk Assessment that is less than 12 months old.~~*

*~~Supplementary documents can be submitted to:~~*

*~~Email: [referrals@smartlondon.org.uk](mailto:referrals@smartlondon.org.uk)~~*

*~~Fax: 020 7376 7892~~*

*~~Post: SMART, The Basement, 15 Gertrude Street, London, SW10 0JN~~*

~~- Also, can you change to tick boxes to a drop-down menu with Yes and No, and make their completion ‘required’?~~

~~- Is there a way of attaching a file(s) to this section of the form? Risk Assessments and CPA documents usually come in .doc or .pdf formats. Ideally referrers would attach these documents and we would get them by email.~~

You and SMART

~~-Add new paragraph at top of box: “~~~~If you are completing this without your client/patient being present, please leave it blank. We will complete this box during the induction.~~

~~- Change the first question from ‘~~*~~What are your main reasons for wanting to be referred to SMART?~~*~~’ to ‘~~*~~Why do you want to join SMART?’~~*

~~- Please replace the checkboxes with drop down menu with ‘Yes’ and ‘No’ options for the ‘~~*~~Are you planning to return to employment at some stage?~~*~~’ and ‘~~*~~Are you interested in doing some sort of training or study?~~*~~’~~

GP Referrals

~~-Please remove the~~ ~~GP Referrals section. There has been a change to our referral process that means we can no longer accept GP referrals.~~

~~Monitoring Information~~

~~-Could you add the following options to the ‘Ethnic origin’ drop down menu, with the bold type as section headers than can’t be chosen? If this is not possible please just leave them off the list.~~

**~~White~~**

~~British~~

~~Irish~~

~~Gypsy or Irish Traveller~~

~~Other White Background~~

**~~Black / African / Caribbean / Black British~~**

~~Black British~~

~~African~~

~~Caribbean~~

~~Any other Black background~~

**~~Mixed/Multiple ethnic groups~~**

~~White and Black Caribbean~~

~~White and Black African~~

~~White and Asian~~

~~Any other Mixed/ Multiple ethnic background~~

**~~Asian / Asian British~~**

~~Indian~~

~~Pakistani~~

~~Bangladeshi~~

~~Chinese~~

~~Any other Asian Background:~~

**~~Other ethnic group~~**

~~Arab~~

~~Arab British~~

~~Other~~

~~-Also, would it be possible for the ‘Other (please specify)’ text field to becoming required if one of ‘Any Other....’ options are chosen on the drop down menu?~~

~~-Typo: In the ‘~~*~~What is your sexual orientation?~~*~~’ change~~ ~~‘Gay Men’ and ‘Gay Women / Lesbian’ to ‘Gay Man’ and ‘Gay Woman / Lesbian’~~

Your Contract with SMART

~~- Please remove the entire ‘Your Contract with SMART’ section. We will cover this in person during the induction meeting, obtain signatures and give members written copies of this agreement.~~

Important Information

~~-Change ‘~~~~Important Information’ box title to ‘~~~~Referrer Agreement’~~

~~- Add extra lines between paragraphs in the blocks of text~~

~~-~~~~Typo: ‘I have enclosed a full risk assessment~~ **~~of~~** ~~doctor's letter’ (should be ‘or’)~~

~~-Can we make the two checkboxes ‘required’ fields?~~

~~-Change the ‘True/False’ dropdown to ‘Yes/No’.~~

-~~Remove this text:~~ *~~‘Please ensure all the boxes are ticked before signing and submitting the form.~~*

*~~Name : --------------------------- Signed: -------------------------------   
Date : ---------------------------‘~~*

General

- ~~When logged in as an ‘Agent’, when clicking ‘create’ to the submit the form I get this:~~

**~~Error. An error occurred while processing your request.~~**

Create Project Form

~~-No. of Participants is limited to 1-6 people. The max number of participants needs to be higher.~~

-Some of the date sections are giving the error message ‘this is not a valid date’. I think this is because the calendar inputs the date using “Day/Month/Year”, but the field wants to date to be “Month/Day/Year” to work. We’d want to all dates to be in Day/Month/Year format.

-

Dashboard

-Barred Member section: Please display only Name, Reason for Leaving, and Notes.

Only a name, age, notes

Manage Members

-~~Please replace the City column on the main Manage Members page with Mobile number~~

Assign Members

~~-When the rate column on the Assign Members page is filled in with an amount other than 0, this does not automatically show up in the attendance page. That is the say, for each day that this person works, the rate has to be manually filled for every day.~~