

Dynamics 365 User Guide – National Support Line

This guide will give an overview of how to use the Microsoft Dynamics 365 Database for the National Support Line.

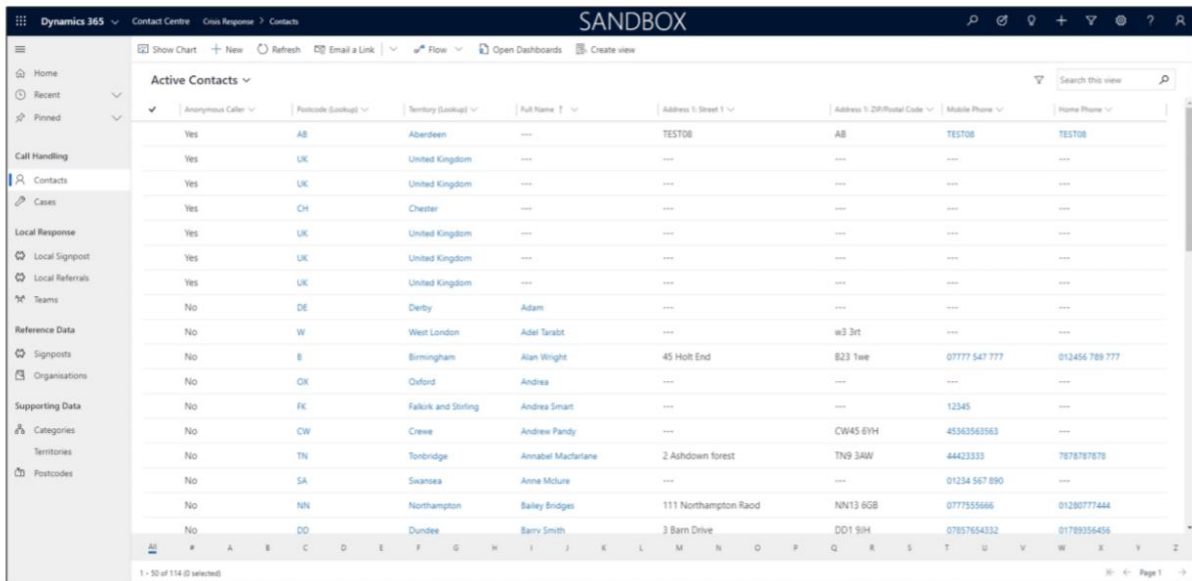
This guide will show you how to:

- Create a new contact
- Create a new case
- Edit existing contacts and cases

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1. What is Microsoft Dynamics?



Anonymous Caller	Postcode (lookup)	Territory (lookup)	Full Name	Address 1, Street 1	Address 1, ZIP/Postal Code	Mobile Phone	Home Phone
Yes	AB	Aberdeen	---	TEST08	AB	TEST08	TEST08
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	CH	Chester	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
No	DE	Derby	Adam	---	---	---	---
No	W	West London	Adel Tarabt	---	w3 3rt	---	---
No	B	Birmingham	Alan Wright	45 Holt End	B23 1we	07777 547 777	012456 789 777
No	OX	Oxford	Andrea	---	---	---	---
No	FE	Falkirk and Stirling	Andrea Smart	---	---	12345	---
No	CW	Crewe	Andrew Pandy	---	CW45 6YH	4536363563	---
No	TN	Tonbridge	Annabel Macfarlane	2 Ashdown forest	TN9 3AW	44423333	7878787878
No	SA	Swansea	Anne McLure	---	---	01234 567 890	---
No	NN	Northampton	Bailey Bridges	111 Northampton Road	NN13 6GB	0777555666	01280777444
No	DD	Dundee	Barry Smith	3 Barn Drive	DD1 5IH	0793765432	01789356456

Microsoft Dynamics Homepage

The Microsoft Dynamics 365 Support Line database is where the outcomes of the calls handled on the National Support Line are entered.

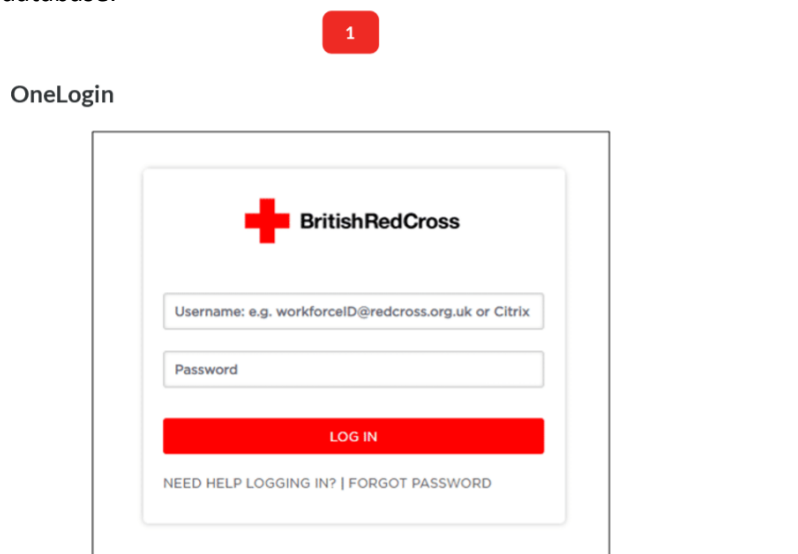
Callers to the line are created as 'Contacts' and the support we provide or arrange for them is recorded as a 'Case'.

Cases can then be passed to the local Red Cross team to action.

The database stores the contacts and cases so they can be accessed and added to as necessary.

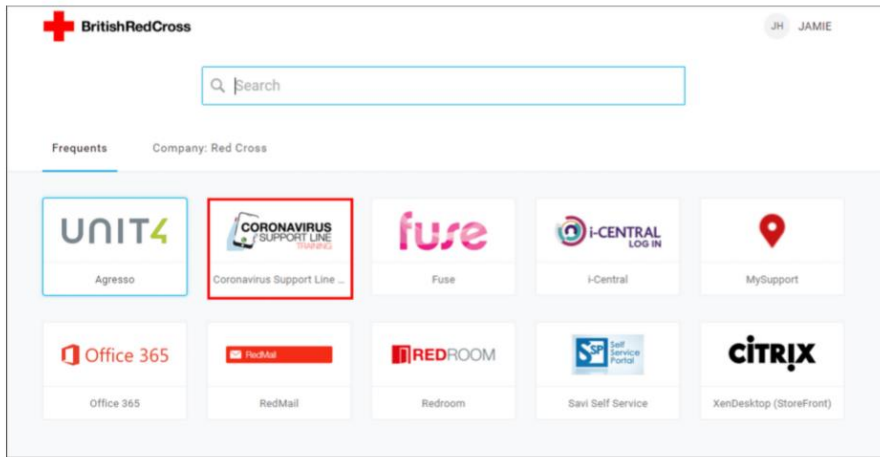
2. How to Log In

The Microsoft Dynamics database is accessed through OneLogin. Below are the steps you should follow to access the database.



Go to <https://redcross.onelogin.com> and enter your details to log in.

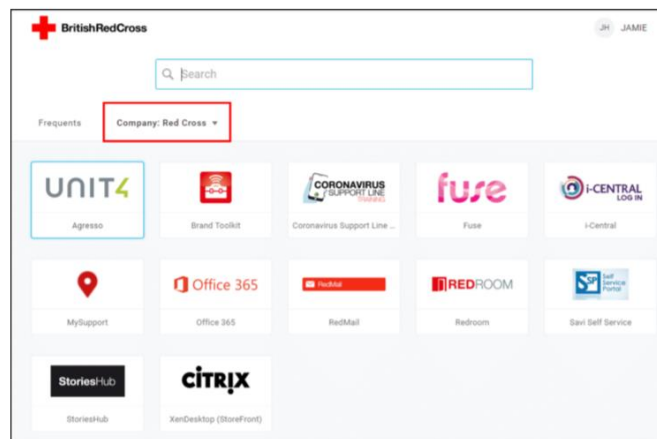
OneLogin Portal



The 'Coronavirus Support Line' tile will take you to the dynamics system.

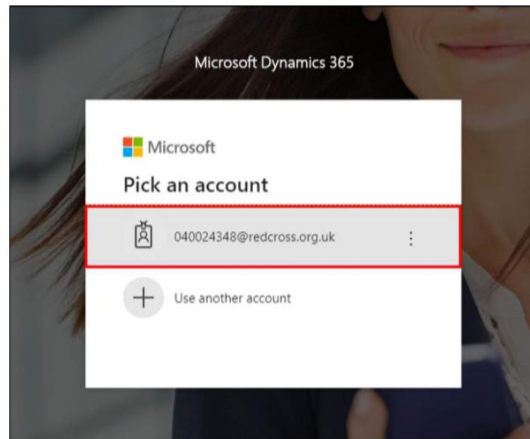
When access to the database is created you will have access to the live system and the training system. Please be careful to ensure you select the correct option.

OneLogin Portal



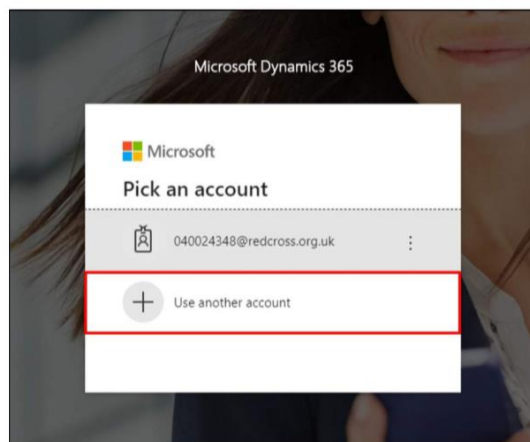
If the 'Coronavirus Support Line' tile is not showing when you first log in select the 'Company: Red Cross' tab as it may initially only show there for some people.

Pick an account



Your Red Cross email address should be showing. Click this to enter the database.

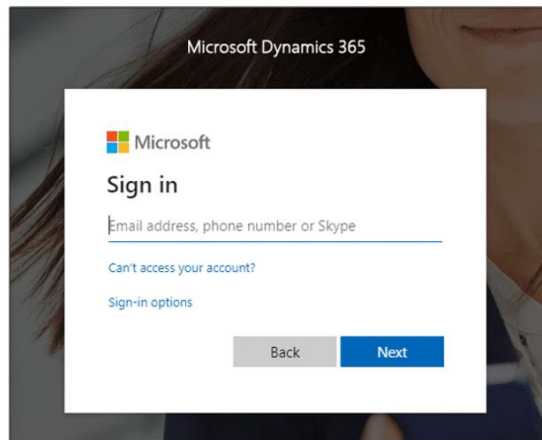
Use another account



If your Red Cross email address is not showing then click 'Use another account'.

This may happen if you are using your own computer and have your own Microsoft account. Microsoft may default to your personal account.

Sign in



Enter your Red Cross email address and password to access the database.

Summary

The database is accessed through OneLogin.

Ensure you select the right tile e.g. 'Training' when you want to practice and the 'Live' tile when you are working on the support line.

If the 'Coronavirus Support Line' tile does not show immediately try going to the 'Company: Red Cross' tab in the OneLogin portal.

If you're Red Cross email is not selected immediately then select 'Use another account' and enter your Red Cross email address.

3. Homepage

Anonymous Caller	Postcode (lookup)	Territory (lookup)	Full Name	Address 1: Street 1	Address 1: ZIP/Postal Code	Mobile Phone	Home Phone
Yes	AB	Aberdeen	---	TEST08	AB	TEST08	TEST08
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	CH	Chester	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
No	DE	Derby	Adam	---	---	---	---
No	W	West London	Adel Tarabt	---	w3 3ft	---	---
No	B	Birmingham	Alan Wright	45 Holt End	B23 1ee	07777 547 777	012456 789 777
No	OX	Oxford	Andrea	---	---	---	---
No	FK	Falkirk and Stirling	Andrea Smart	---	---	12345	---
No	CW	Crewe	Andrew Pandy	---	CW45 6YH	45363563563	---
No	TN	Tonbridge	Annabel Macfarlane	2 Ashdown forest	TN9 3AW	4442333	78787878
No	SA	Swansea	Anne McLure	---	---	01234 567 890	---
No	NN	Northampton	Sally Bridges	111 Northampton Road	NN13 6GB	0777555666	01280777444
No	DD	Dundee	Barry Smith	3 Barr Drive	DD1 5JH	07857654332	01789356456

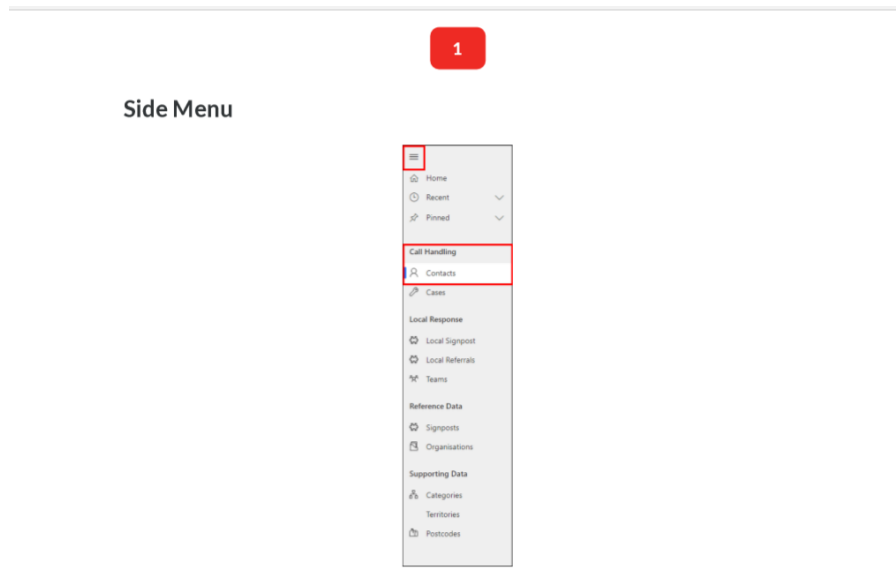
When you have logged in to the system you will be taken to the homepage.

This will show all the 'Active Contacts' already registered in the system.

This should be the starting point for any new contact or case.

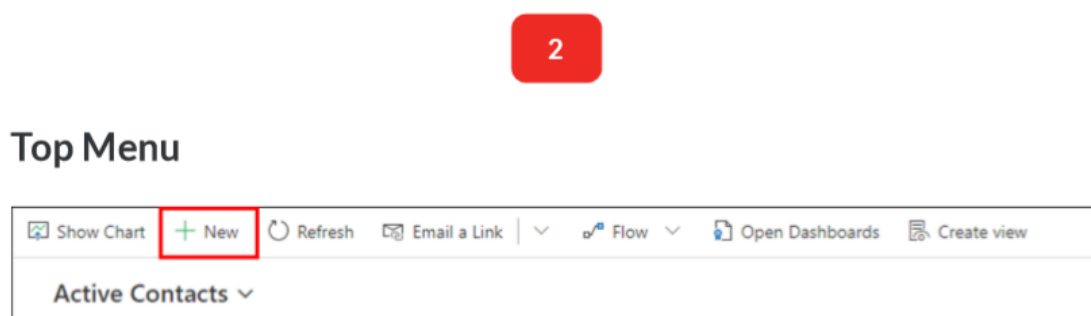
Homepage Features

We will now look at the standard actions you would take on the homepage.



The menu running down the left of the screen shows different sections of the database. National Support Line call handlers should only need to access the section 'Call Handling - Contacts'. Clicking on this will bring you back to the homepage.

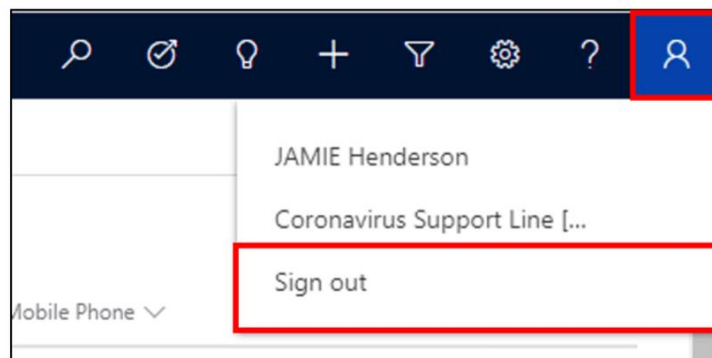
The three lines icon at the top of this menu can be used to collapse and re-open the menu. This can be useful for giving more space on the screen.



The menu running along the top of the main section of the screen allows you to take actions and will change depending on the screen displayed below.

On the homepage the only option you would need to open is 'New'. This would be selected when a new contact needs to be created.

Sign Out



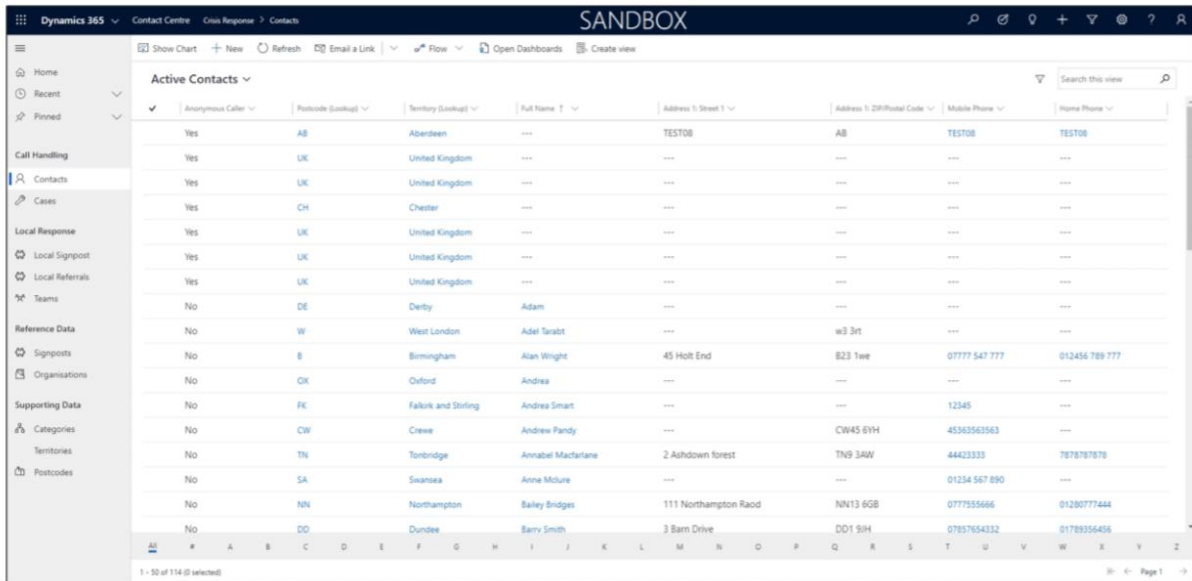
When you have finished using the system click the head and shoulders icon in the top right corner of the screen and select 'Sign Out'.

Summary

These are the basic features of the homepage.

We will now look at the specific actions taken to find and create contacts and cases.

4. Find a contact



The screenshot shows the Dynamics 365 Contact Centre interface. The main area displays a table of 'Active Contacts'. The table has columns for 'Anonymous Caller', 'Postcode (lookup)', 'Territory (lookup)', 'Full Name', 'Address 1 Street 1', 'Address 1 ZIP/Postal Code', 'Mobile Phone', and 'Home Phone'. The table contains 14 rows of contact data. At the bottom of the table, it says '1 - 50 of 114 (0 selected)'. The interface also includes a sidebar with navigation options like 'Home', 'Recent', 'Pinned', 'Call Handling', 'Contacts', 'Cases', 'Local Response', 'Local Signpost', 'Local Referrals', 'Teams', 'Reference Data', 'Signposts', 'Organisations', 'Supporting Data', 'Categories', 'Territories', and 'Postcodes'. The top of the interface shows 'Dynamics 365', 'Contact Centre', 'Cases Response', 'Contact', and 'SANDBOX'.

Anonymous Caller	Postcode (lookup)	Territory (lookup)	Full Name	Address 1 Street 1	Address 1 ZIP/Postal Code	Mobile Phone	Home Phone
Yes	AB	Aberdeen	---	TEST08	AB	TEST08	TEST08
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	CH	Chester	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
No	DE	Derby	Adam	---	---	---	---
No	W	West London	Adel Tarabt	---	w3 3rt	---	---
No	B	Birmingham	Alan Wright	45 Holt End	B23 1we	07777 547 777	012456 789 777
No	OX	Oxford	Andrea	---	---	---	---
No	FE	Falkirk and Stirling	Andrea Smart	---	---	12345	---
No	CW	Crewe	Andrew Pandy	---	CW45 6YH	45363563563	---
No	TN	Tonbridge	Annabel Macfarlane	2 Ashdown forest	TN9 3AW	44423333	7878787878
No	SA	Seasea	Anna Midure	---	---	01234 567 890	---
No	NN	Northampton	Rakley Bridges	111 Northampton Road	NN13 6GB	0777555666	01280777444
No	DD	Dundee	Barry Smith	3 Barn Drive	DD1 5IH	07857654332	01789356456

The homepage of the database displays all the contacts which have already been entered.

When a service user calls we can search these contacts to find out if they have called before or if we have to create a new contact.

Below are the steps to take for searching for a contact.

1

Alphabetic Search

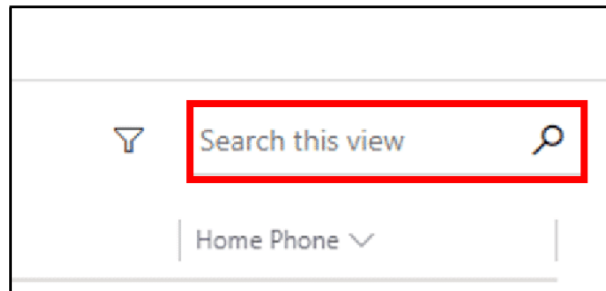


Contacts are grouped alphabetically in the system via the first letter of the name e.g. John Smith would be grouped under J.

Along the bottom of the screen are the letters of the alphabet. Selecting a letter will show all contacts related to that letter.

Clicking 'All' will allow you to see all entries again.

Search Bar



In the top right of the homepage is the 'Search this view' field.

From here you type in a contact's name and click the magnifying glass to search. You can also search with only a few letters of that contact's name, or even with their phone number.

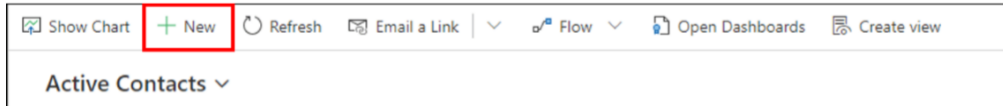
For more information about searching for contacts, go to the **'Repeat Callers Guide'** on the Operator Manual.

Summary

Searching can be done by scrolling through the alphabetic list or searching on the name.

To avoid duplication of information in the system you should always search the database for a service user before creating a new contact.

5. Create a New Contact

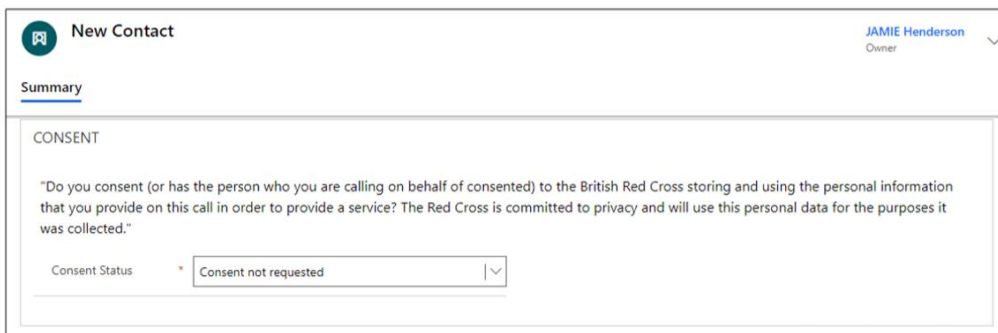


A new contact should be created when no existing record for the service user exists in the system.

To begin this process select 'New' from the top menu.

1

New Contact - Consent

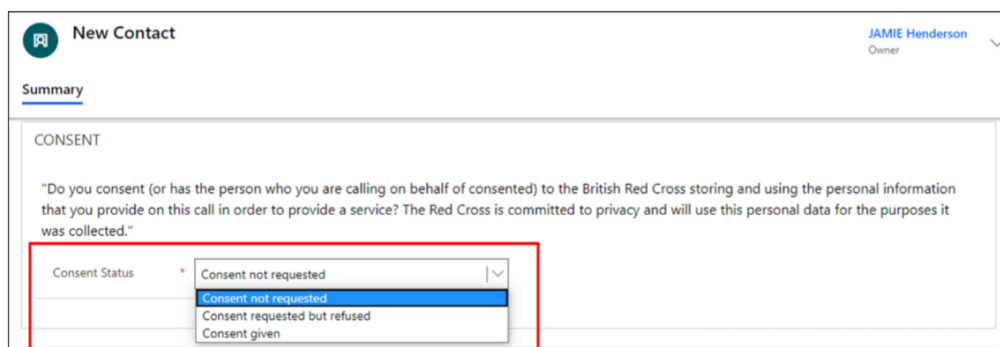
A screenshot of a 'New Contact' form. The title is 'New Contact' and the owner is 'JAMIE Henderson'. The 'Summary' section is active. Under the heading 'CONSENT', there is a text block: "Do you consent (or has the person who you are calling on behalf of consented) to the British Red Cross storing and using the personal information that you provide on this call in order to provide a service? The Red Cross is committed to privacy and will use this personal data for the purposes it was collected." Below this text is a dropdown menu labeled 'Consent Status' with the value 'Consent not requested' selected.

The 'New Contact' screen is now shown.

The first step is to read the Consent statement shown on screen.

2

Consent Status

A screenshot of the 'New Contact' form, similar to the previous one, but with the 'Consent Status' dropdown menu open. The menu is highlighted with a red box and shows four options: 'Consent not requested' (selected), 'Consent requested but refused', and 'Consent given'. The text 'Consent not requested' is also highlighted in blue within the dropdown.

In the 'Consent Status' record the response given by the caller.

3

Consent given

Summary

CONSENT

"Do you consent (or has the person who you are calling on behalf of consented) to the British Red Cross storing and using the personal information that you provide on this call in order to provide a service? The Red Cross is committed to privacy and will use this personal data for the purposes it was collected."

Consent Status	* Consent given	Consent Given By	* The Caller for themselves
Consent Decision Date	* 07/07/2020		

When consent has been given update the 'Consent Status' field to reflect this.

On this 'New Contact' screen 'Consent Given By' should always remain as 'The Caller for themselves'. If the caller is calling on behalf of a beneficiary we will record the answer to the request for their consent at another stage of the process.

Enter the 'Consent Decision Date'.

4

Contact Information

Save Save & Close + New Flow

New Contact

Summary

CONTACT INFORMATION

First Name	* John	Address Line 1	45 Apple Tree Lane
Last Name	* Washington	Home Phone	---
Postcode	* SE4 1DR	Mobile Phone	* 07854 456 458
Postcode (Lookup)	* SE		
Region (Lookup)	* South East London		

The 'New Contact' screen is now shown.

We should now enter as much 'Contact Information' about the caller as we can.

When the caller has given consent the 'First Name', 'Last name', 'Postcode', 'Postcode (Lookup)' and 'Region (Lookup)' fields are mandatory.

5

Postcode and Region

The screenshot shows a 'New Contact' form with a 'Summary' section. Under 'CONTACT INFORMATION', the following fields are visible:

First Name	John	Address Line 1	45 Apple Tree Lane
Last Name	Washington	Home Phone	---
Postcode	SE4 1DR	Mobile Phone	07854 456 458
Postcode (Lookup)	SE		
Region (Lookup)	South East London		

The 'Postcode (Lookup)' and 'Region (Lookup)' fields are highlighted with a red box.

The 'Postcode (Lookup)' field requires the first part of the postcode i.e. the letter(s) at the start of the postcode.

The 'Region (Lookup)' is then automatically filled based on this information.

6

Save

The screenshot shows the same 'New Contact' form as in the previous image. The 'Save' button in the top navigation bar is highlighted with a red box.

When the details for a contact have been entered you can now 'Save' the contact to the database.

Clicking 'Save' will allow you to create a new case for the contact. This is the option you would take most often.

Clicking 'Save and Close' will enter the contact to the database and return you to the homepage.

Caller Cases

The screenshot shows a contact record for John Washington. The contact information includes: Anonymous Caller (No), First Name (John), Last Name (Washington), Postcode (SE4 1DR), Postcode (Lookup) (SE), Region (Lookup) (South East London), Address Line 1 (45 Apple Tree Lane), Home Phone (---), and Mobile Phone (07854 456 458). The 'Caller Cases' section is active and shows a table with one row: Case Title 1, Case Number, Priority, Origin, Customer, Donor, Status, and Created On. A 'New Case' button is highlighted in red in the top right of the table area. The table currently displays 'No data available.'

When a contact has been saved the 'Caller Cases' section becomes active under their contact details.

As this is a newly created contact no cases will be connected to it.

To start recording the details of the service users case click '+ New Case'.

Summary

These are the steps for creating a new contact and starting a new case for that contact.

There are some cases where we cannot obtain any details or the caller wants to remain anonymous. Below we will look at how to record this in the database.

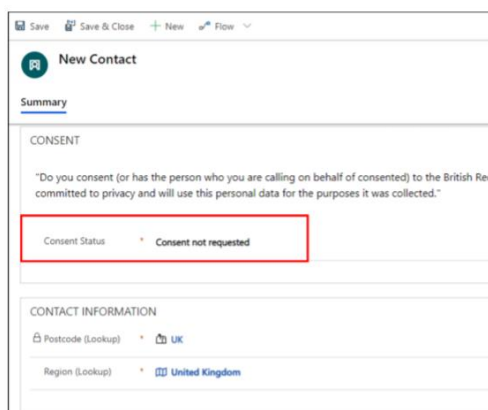
Consent not requested/requested but refused

Sometimes a caller will not provide consent or it will not be possible to or appropriate to request consent.

The database allows us to record records for these such scenarios.

1

Consent Status

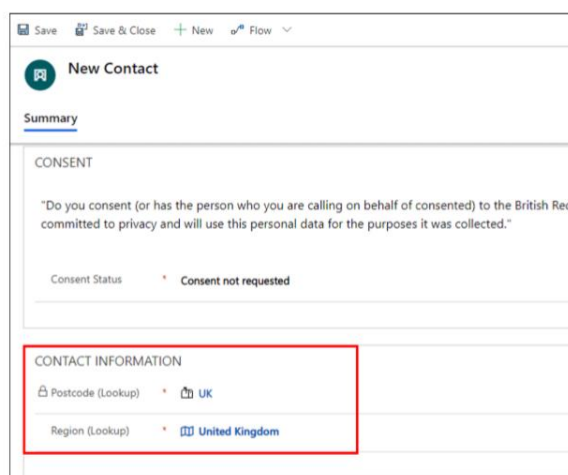


The screenshot shows a 'New Contact' form with a 'Summary' section. Under the 'CONSENT' heading, there is a text block: "Do you consent (or has the person who you are calling on behalf of consented) to the British Red committed to privacy and will use this personal data for the purposes it was collected." Below this, the 'Consent Status' field is highlighted with a red box and contains the value 'Consent not requested'.

When creating a new contact, sometimes it's not appropriate to request consent, in which case 'Consent not requested' could be selected. Sometimes, we will request the callers consent to keep their contact details, and they will refuse; in this instance we would select 'Consent requested but refused'.

2

Postcode and Region



The screenshot shows a 'New Contact' form with a 'Summary' section. Under the 'CONTACT INFORMATION' heading, there are two fields: 'Postcode (Lookup)' with the value 'UK' and 'Region (Lookup)' with the value 'United Kingdom'. These two fields are highlighted with a red box.

When the 'Contact Status' is set to 'Consent not requested' or 'Consent requested but refused' the only fields required are 'Postcode (Lookup)' and 'Region (Lookup)' .

If no information has been provided by the caller regarding this then 'UK' can be entered in the 'Postcode (Lookup)' and 'United Kingdom' will automatically populate in the 'Region (Lookup)' field.

Save Save & Close + New Flow

New Contact

Summary

CONSENT

"Do you consent (or has the person who you are calling on behalf of consented) to the British Red committed to privacy and will use this personal data for the purposes it was collected."

Consent Status * Consent not requested

CONTACT INFORMATION

Postcode (Lookup) * UK

Region (Lookup) * United Kingdom

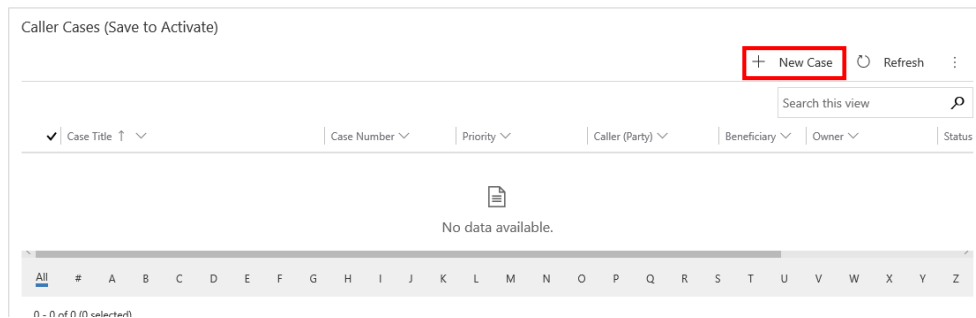
When 'Save' has been pressed the 'Caller Cases' section will become active below and a new case can be created detailing the information provided by the caller.

Summary

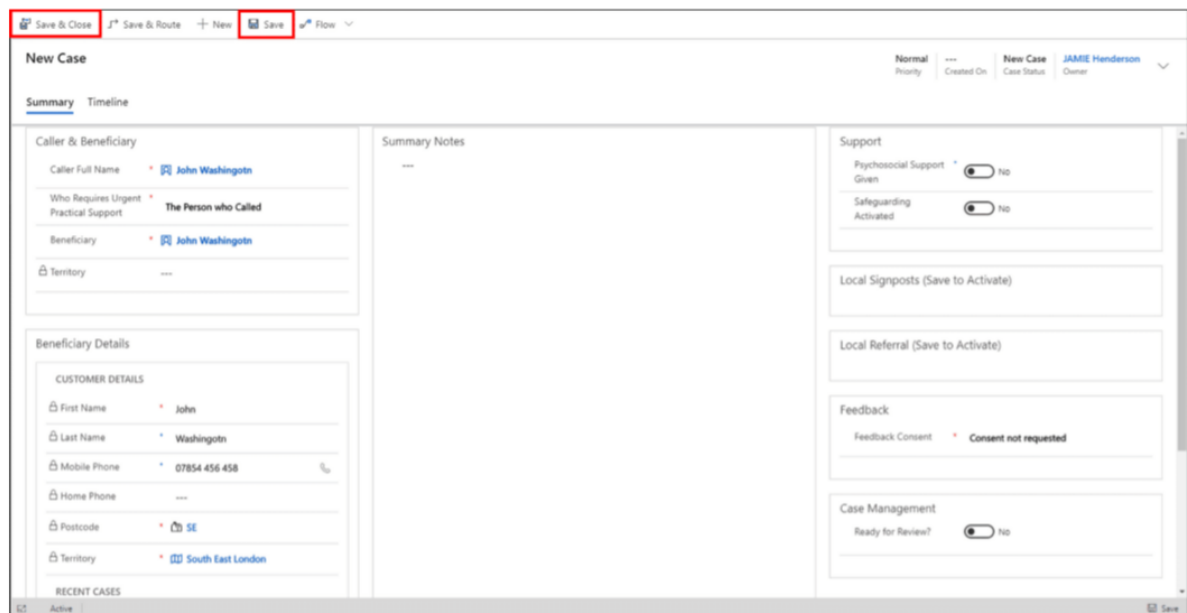
These are the steps for creating a new contact when that contact has not consented to us keeping their details on our database, or it has not been appropriate to ask their consent to keep their details.

In this instance, the above steps show us how to create an anonymous contact for a case to be connected to.

6. New Case



Once you've created a contact and saved that record, if you scroll to the bottom of the page you'll see the 'Active Cases' section has now become active, and you can click '+ New Case' to create a new case.






The 'New Case' screen should now be displayed.

In the top menu are 'Save and Close' and 'Save'. Select 'Save and Close' when you have entered all the information and want to move on to your next call. Select 'Save' to save your work as you go.

The 'Local Signpost' and 'Local Referral' sections will only become active when 'Save' is pressed.




Caller and Beneficiary details










Caller and Beneficiary

Caller & Beneficiary	
Caller Full Name *	 John Washingotn
Who Requires Urgent Practical Support *	The Person who Called
Beneficiary *	 John Washingotn
 Territory	---

The 'Caller and Beneficiary' section will show the details of the 'Caller' and the 'Beneficiary' . Often this will be the same person but for the occasions when someone is calling on behalf of someone else we can record this too.

Beneficiary Details

Caller & Beneficiary	
Caller Full Name *	 John Washingotn
Who Requires Urgent Practical Support *	The Person who Called
Beneficiary *	 John Washingotn
 Territory	---

Beneficiary Details	
CUSTOMER DETAILS	
 First Name *	John
 Last Name *	Washingotn
 Mobile Phone *	07854 456 458 
 Home Phone	---
 Postcode *	 SE
 Territory *	 South East London

The 'Beneficiary Details' section cannot be edited and is automatically filled with contact details of the 'Beneficiary' selected above in 'Caller and Beneficiary' .

2

Who Requires Urgent Practical Support

Caller & Beneficiary

Caller Full Name * John Washingotn

Who Requires Urgent Practical Support * The Person who Called | v

Beneficiary * Someone Else

Territory ---

If the person who requires support is not the caller then we can change the 'Who Requires Urgent Practical Support' field to 'Someone Else' by clicking the drop down arrow on this field.

3

Beneficiary

Caller & Beneficiary

Caller Full Name * John Washingotn

Who Requires Urgent Practical Support * Someone Else | v

Beneficiary * ---

Required fields must be filled in.

No

Consent from Beneficiary

You must confirm the caller has consent from the beneficiary to discuss this case, before saving the record

Territory ---

Selecting 'Someone Else' will remove the entry in the 'Beneficiary' field and also the detail in the 'Beneficiary' section below.

We must now enter the details of the 'Beneficiary' .

4

New Contact

Caller & Beneficiary

Caller Full Name * [📞] John Washington

Who Requires Urgent Practical Support * Someone Else

Beneficiary * Look for Beneficiary [🔍]

Consent from Beneficiary

Territory

Contacts

- [📞] Adam
- [📞] Adel Tarabt w3 3rt
- [📞] Alan Wright B23 1we
- [📞] Andrea

+ New Contact [🔄] Change View

If the 'Beneficiary' is not an existing contact then select 'New Contact'!

5

Quick Create: Contact (Beneficiary Details)

Consent Statement [X]

"Do you consent (or has the person who you are calling on behalf of consented) to the British Red Cross storing and using the personal information that you provide on this call in order to provide a service? The Red Cross is committed to privacy and will use this personal data for the purposes it was collected."

Close

The 'Quick Create Contact' window will open and you will be prompted to read the 'Consent Statement' this time so we can keep a record of the beneficiaries details.

6

Quick Create: Contact (Beneficiary Details)

Quick Create: Contact

Consent

Consent Status * Consent given

Consent Decision Date

Consent Given By * The Caller on behalf of the Beneficiary |

Contact Providing Consent * The Caller on behalf of the Beneficiary

Contact Information

First Name * ---

Last Name * ---

Mobile Phone * ---

Home Phone ---

Address Information

Address Line 1 ---

Postcode * ---

Postcode (Lookup) * ---

Region (Lookup) * ---

Save and Close Cancel

In the 'Consent' section fill in the 'Consent Status' field first to confirm if the caller has confirmed the beneficiaries consent for their details to be recorded.

'Consent Given By' on this contact screen should be marked as 'The Caller on behalf of the Beneficiary'.

We should then reflect this in the 'Contact Providing Consent' field by entering the callers' name. The callers' name will be available to select as they are an existing contact.

Then enter the contact details of the beneficiary, capturing as much detail as possible.

7

Existing Beneficiary

Caller & Beneficiary

Caller Full Name * John Washington

Who Requires Urgent Practical Support * Someone Else

Beneficiary * Look for Beneficiary

Consent from Beneficiary

Territory

Summary ---

Contacts

- Adam
- Adel Tarabt w3 3rt
- Alan Wright B23 1we
- Andrea

+ New Contact Change View


Pressing the 'Search' icon on the 'Beneficiary' field will open a scroll box of all the existing contacts in the database. If the 'Beneficiary' has already been registered in the system then they can be selected from here.

The 'Beneficiary Details' section below will then populate with their contact details.




8

Beneficiary


Caller & Beneficiary

Caller Full Name *  John Washingotn

Who Requires Urgent Practical Support * Someone Else

Beneficiary *  Adel Tarabt  

Consent from Beneficiary Yes

 Territory ---

Before moving on to the next section you will also have to confirm that the caller has 'Consent from Beneficiary' to discuss the case.

This applies for every case where a beneficiary is discussed.


If you would like a stand-alone guide to how to enter details on the system when someone is calling on behalf of something else, you will find the '**Caller and Beneficiary**' guide on the Operator Manual.

Summary

If the caller and the person who requires support are the same person then no action is required in the 'Caller and Beneficiary' and 'Beneficiary Details' sections. Just confirm the details are accurate.

If the caller and the person who requires support are different then we can add an existing contact or create a new contact for the 'Beneficiary'.

Summary Notes



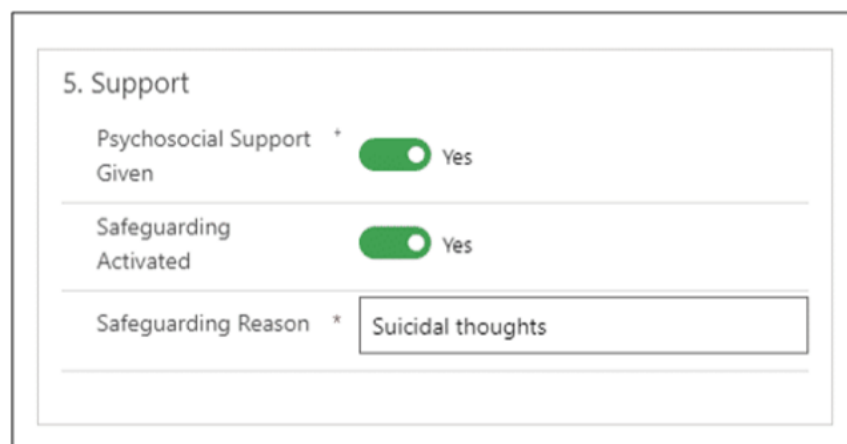
4. Summary Notes

A large, empty rectangular text area for recording summary notes.

The 'Summary Notes' section is where you would record the high level details of the call and any important additional information.

Please ensure the notes recorded in here are in line with the safeguarding and data protection principles detailed in your initial training.

Support



5. Support

Psychosocial Support ^{*} Yes

Safeguarding Activated Yes

Safeguarding Reason ^{*}

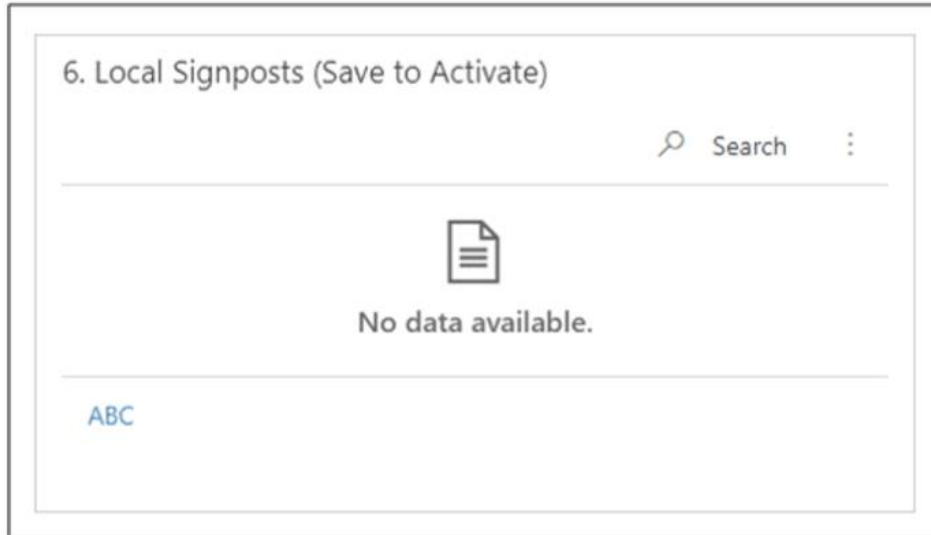
The 'Support' section is where you should record if any psychosocial support was given and whether safeguarding was activated.

These fields will default to 'No' so need to be changed if required.

If 'Safeguarding Activated' is set to 'Yes' the 'Safeguarding Reason' will become active. Record in here only the high level reason.

You should still follow the procedures detailed in your initial training for reporting a safeguarding issue.

Local Signposts

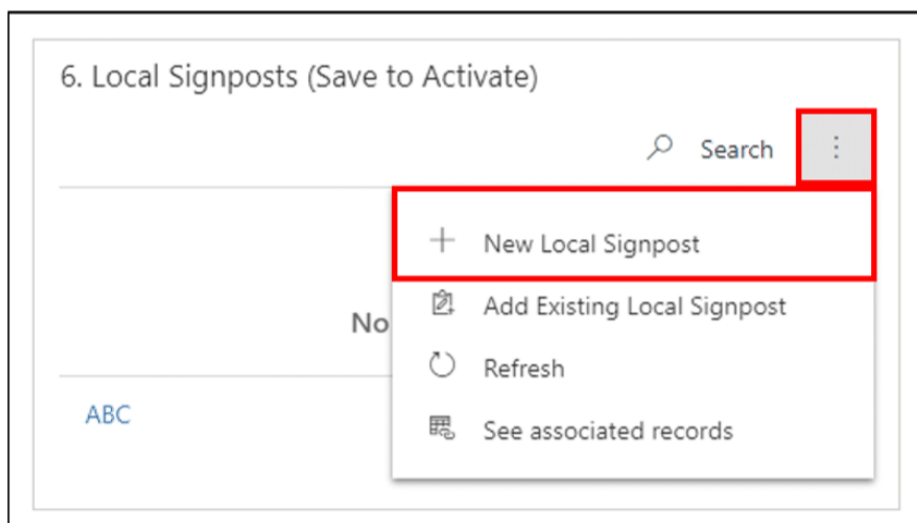


The 'Local Signposts' section will become available when 'Save' is pressed on the top menu.

In this section you will record the main categories of signposting from the Operators Manual that you have directed a service user to.

1

New Local Signpost



To add a new local signpost click the 3 dots icon next to the 'Search' field.

From the list then shown, select '+ New Local Signpost'.

2

New Local Signpost

You will now be shown the 'New Local Signpost' screen.

The only field you should need to edit in this section is 'Signpost'.

In this field, enter the category the signpost you have provided falls under.

The full list of these can be opened out by pressing enter or clicking the search icon in the 'Signpost' field.

3

Signpost

4

Local Signpost

The screenshot shows a 'New Local Signpost' form. At the top, there are buttons for 'Save', 'Save & Close', '+ New', and 'Flow'. The 'Save & Close' button is highlighted with a red box. Below the buttons, the form has a 'Details' section. The 'Local Signpost' section contains the following fields: 'Case' (Support for The Person who Called), 'Contact' (John Washington), 'Locality' (National), 'Territory' (United Kingdom), and 'Signpost Category' (Listed). The 'Signpost' field is highlighted with a red box and contains the text 'Age Related Health in United Kingdom'.

When you have selected the 'Signpost' the option will turn blue and the 'Available Organisations' section will be displayed below. Please ignore this section as it is not currently in use.

When you are happy with your selection click 'Save and Close' on the top menu.

5

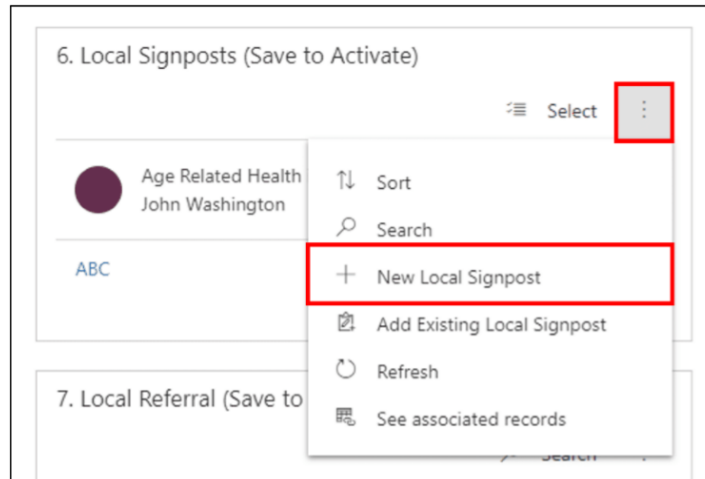
Local Signpost

The screenshot shows a section titled '6. Local Signposts (Save to Activate)'. There is a 'Select' button and a vertical ellipsis menu icon. Below this, there is a list of signposts. The first signpost is highlighted with a red box and contains the text 'Age Related Health in United Kingdom' and 'John Washington'. Below the list, there is a blue 'ABC' label.

You will be taken back to the main case page and the signpost entered will now be shown in section 6.

The high level category of the signpost will be shown, enter the specifics in the 'Summary Notes' section, e.g. Signposted service user to Age UK.

Additional Local Signpost



To add an additional local signpost follow the same process as when you added the first. Select the 3 dots next to 'Search' and select '+ New Local Signpost' from the menu.

There is no limit to the number of local signposts that can be entered.

Summary

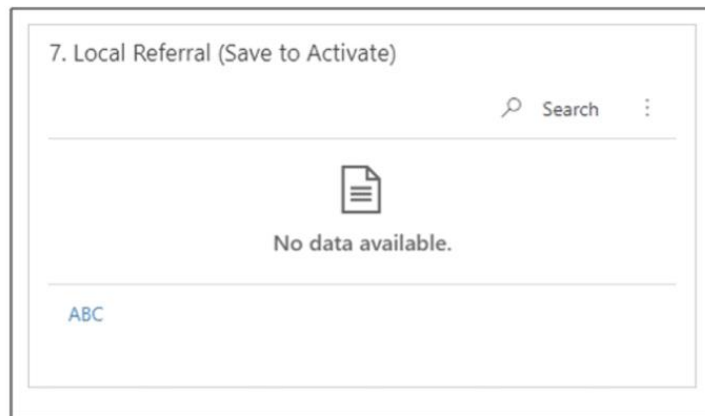
The 'Local Signpost' section will only become active when 'Save' has been selected on the top menu.

Add a new local signpost by clicking the three dots next to 'Search' and selecting '+ New Local Signpost' from the menu.

Add the category from the Operators Manual the signpost falls under. Enter more specific detail about the signpost in the 'Summary Notes' section.

Multiple 'Local Signposts' can be entered on a case.

Local Referral

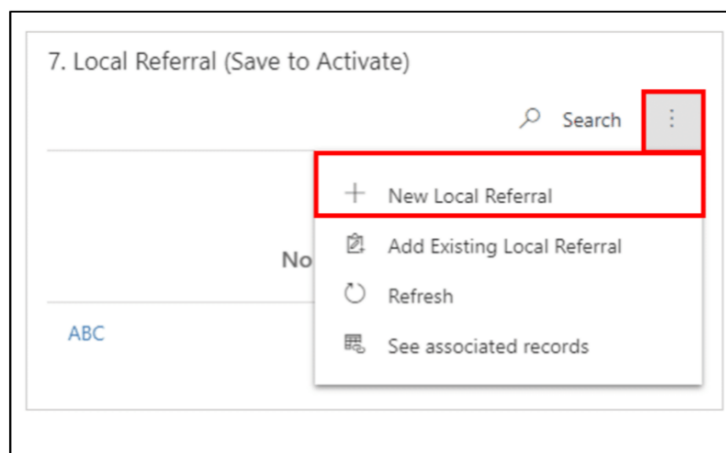


The 'Local Referral' section will become available when 'Save' is pressed on the top menu.

In this section you should enter the detail of the practical support a service user requires if there were no suitable signposting options available, or if their practical support needs are too urgent for signposting. This information will then be passed to a local Red Cross tactical cell to be actioned.

1

New Local Referral



To add a new local referral click the 3 dots icon next to the 'Search' field.

From the list then shown, select '+ New Local Referral'.

2

New Local Referral

The screenshot shows a web form titled 'New Local Referral'. At the top, there are navigation buttons: 'Save', 'Save & Close', '+ New', and 'Flow'. Below the title, the 'General' section is active. It contains four rows of data, each with a lock icon on the left and a value on the right: 'Case' is 'Support for The Person who Called', 'Contact' is 'John Washington', and 'Territory' is 'South East London'. The 'Local Response Type' field is currently empty and is highlighted with a red rectangular box.

You will now be shown the 'New Local Referral' screen.

The only field you should need to edit in this section is 'Local Response Type'.

The other fields are locked and are populated based on what has been entered in the 'Caller and Beneficiary' section.

3

Local Response Type

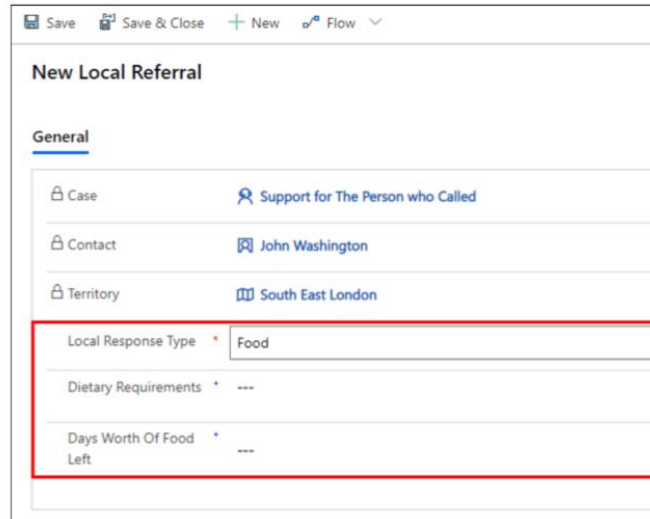
This screenshot shows the same 'New Local Referral' form as in the previous image, but with the 'Local Response Type' dropdown menu open. The dropdown list is highlighted with a red box and contains the following options: '--Select--', '--Select--', 'Food', 'Medication', 'Refugee Services Support', 'Restoring Family Links Support (inc. International Family Tracing)', 'Mobility Aids Service (for mobility equipment such as wheelchairs)', and 'Other Local Response'. Below the dropdown, there are sections for 'Admin Only' (Organisation) and 'Outcome'.

Clicking on the 'Local Response Type' field will show all the available response types.

Click on the appropriate response type.

4

Local Response Type



The screenshot shows the 'New Local Referral' form with the following fields:

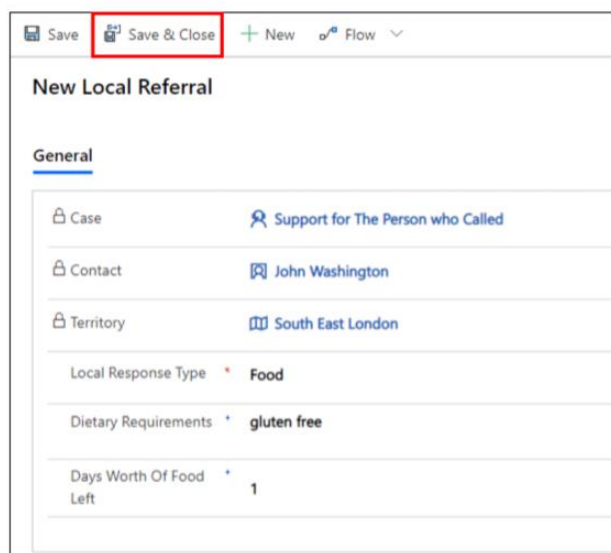
- Case: Support for The Person who Called
- Contact: John Washington
- Territory: South East London
- Local Response Type: Food (highlighted with a red box)
- Dietary Requirements: ---
- Days Worth Of Food Left: ---

For some response types like 'Food' or 'Medication' extra fields will appear when they are selected.

These fields are not mandatory but can be used to provide more information about the service users need.

5

Local Referral



The screenshot shows the 'New Local Referral' form with the following fields:

- Case: Support for The Person who Called
- Contact: John Washington
- Territory: South East London
- Local Response Type: Food
- Dietary Requirements: gluten free
- Days Worth Of Food Left: 1

The 'Save & Close' button in the top menu is highlighted with a red box.

When the details have been entered click 'Save and Close' on the top menu.

6

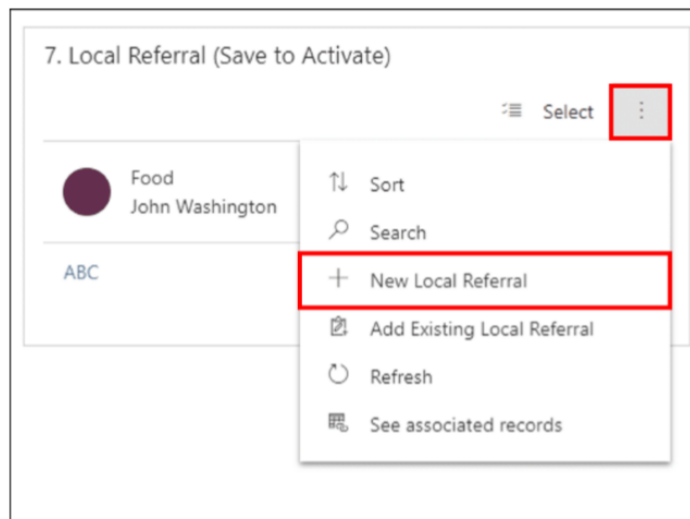
Local Referral



You will be taken back to the main case page and the referral entered will now be shown in section 7.

7

Local Referral



To add an additional local referral follow the same process as when you added the first. Select the 3 dots next to 'Search' and select '+ New Local Referral' from the menu.

Multiple local referrals can be entered.

Summary

The 'Local Referral' section will only become active when 'Save' has been selected on the top menu.

Add a new local referral by clicking the three dots next to 'Search' and selecting '+ New Local Referral' from the menu.

Add the 'Local Response Type' and add additional information based on the type of referral.

Multiple 'Local Referrals' can be entered on a case.

Feedback

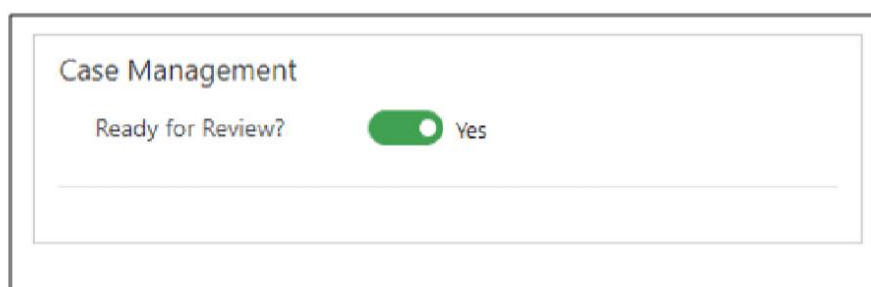


The screenshot shows a form titled 'Feedback'. It contains a field labeled 'Feedback Consent' with a red asterisk indicating it is required. A dropdown menu is open, showing four options: 'Consent not requested', 'Consent not requested', 'Consent requested but refused' (which is highlighted in blue), and 'Consent given'.

In the 'Feedback' section record whether the caller consents to being contacted by the Red Cross to request feedback on services provided.

Case Management

If the case is complete and ready to be reviewed by the data team before being passed to the relevant service then select 'Yes' and click 'Save and Close' at the top of the screen.



The screenshot shows a form titled 'Case Management'. It contains a field labeled 'Ready for Review?' with a green toggle switch that is turned on, and the word 'Yes' next to it.

7. Existing Case

The Microsoft Dynamics database allows you to access and update existing cases. This will allow us to provide the most up to date information to our local teams.

To avoid confusion and ensure we are complying with data protection regulations we should ask the caller to confirm the details we hold for a contact before we update their record.

The image opposite details the information required to do this.

<p>Two of the below:</p> <ul style="list-style-type: none"> a. their full name and postcode, or b. their full name and phone number, or c. their full name and address (house name/number and Road or Town/City (referred to as Territory in the database)). 	and	<p>One piece of information from their previous call such as:</p> <ul style="list-style-type: none"> a. When the service user last contacted the support line – this can be seen in the 'Created on' column of the 'Caller Cases' Table below the 'Contact Information' b. Name of the previous Support Line Call Operator that they spoke to - this can be seen in the 'Owner' column of the 'Caller Cases' Table below the 'Contact Information' c. Signposting services provided – shown on the right side of the main Case screen d. Types of referrals made – shown on the right side of the main Case screen
--	------------	---

Below are the steps that should be taken in the database to update an existing case.

The screenshot shows a table titled 'Active Contacts' with a search bar in the top right corner highlighted in red. The table has the following columns: Anonymous Caller, Postcode (Lookup), Territory (Lookup), Full Name, Address 1: Street 1, Address 1: ZIP/Postal Code, Mobile Phone, and Home Phone. The table contains 16 rows of data, with the last row highlighted in red.

✓	Anonymous Caller	Postcode (Lookup)	Territory (Lookup)	Full Name	Address 1: Street 1	Address 1: ZIP/Postal Code	Mobile Phone	Home Phone
Yes	AB	Aberdeen	---	TEST08	AB	TEST08	TEST08	
Yes	UK	United Kingdom	---	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---	---
Yes	CH	Chester	---	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---	---
No	DE	Derby	Adam	---	---	---	---	---
No	W	West London	Adel Tarabt	---	w3 3rt	---	---	---
No	B	Birmingham	Alan Wright	45 Holt End	B23 1we	07777 547 777	012456 789 777	
No	OX	Oxford	Andrea	---	---	---	---	---
No	FK	Falkirk and Stirling	Andrea Smart	---	---	12345	---	---
No	CW	Crewe	Andrew Pandy	---	CW45 6YH	45363563563	---	---
No	TN	Tonbridge	Annabel Macfarlane	2 Ashdown forest	TN9 3AW	44423333	78787878	
No	SA	Swansea	Anne Miriuse	---	---	01234 567 890	---	---

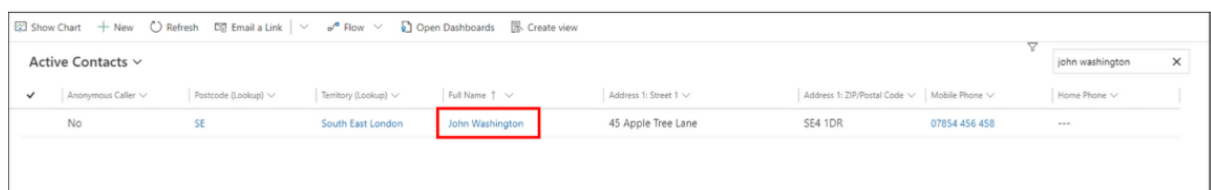
The Microsoft Dynamics database allows you to access and update existing cases.

The starting point for this is to find the contact the case is related to.

From the homepage find a contact by using the 'Search this view' field, or sorting through the alphabetised records.

1

Existing Contact



Anonymous Caller	Postcode (Lookup)	Territory (Lookup)	Full Name	Address 1: Street 1	Address 1: ZIP/Postal Code	Mobile Phone	Home Phone
No	SE	South East London	John Washington	45 Apple Tree Lane	SE4 1DR	07854 456 458	---

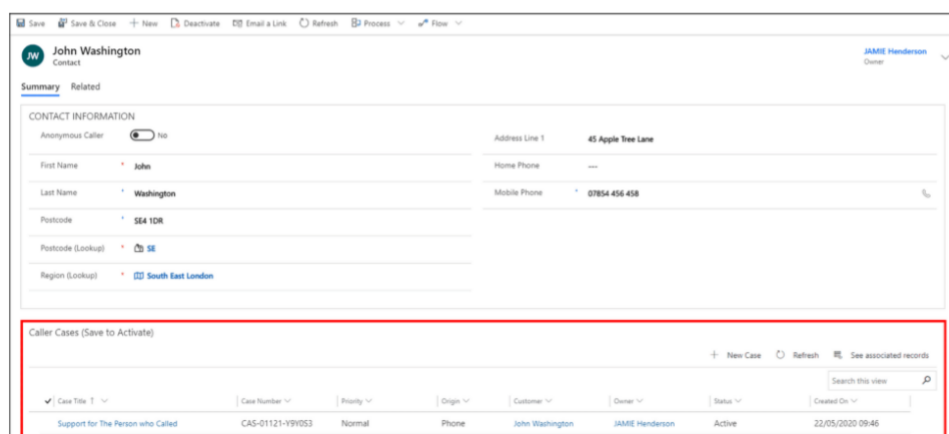
Use the information shown on screen to prompt the service user to confirm this is definitely the correct contact record.

No information should be given to a caller until they have completed the verification process.

To open the contact click the blue text in the 'Full Name' column.

2

Caller Cases



Case Title	Case Number	Priority	Origin	Customer	Owner	Status	Created On
Support for The Person who Called	CAS-01121-Y9W053	Normal	Phone	John Washington	JAMIE Henderson	Active	22/05/2020 09:46

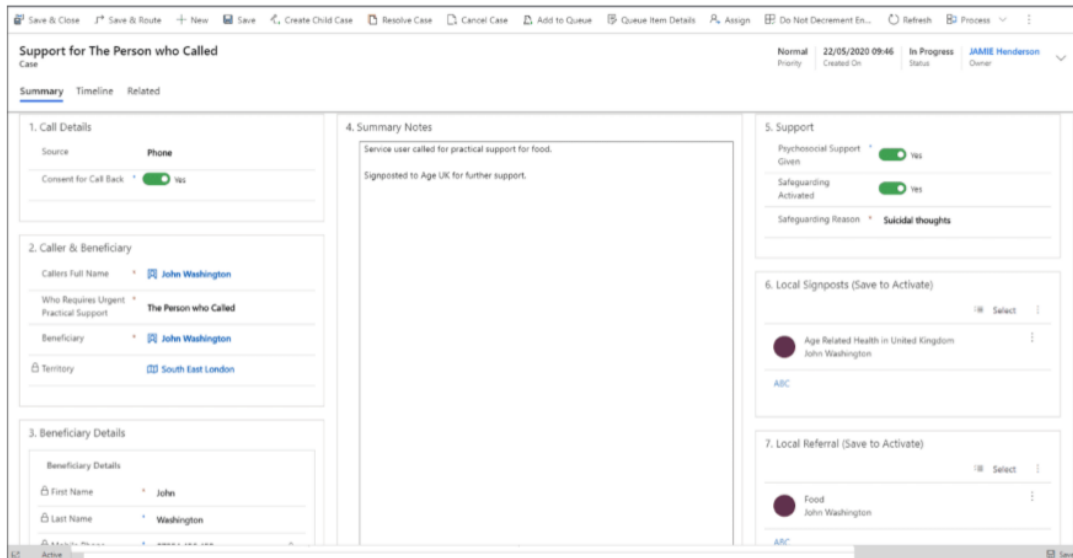
The contact will now be shown on screen.

In the 'Caller Cases' section any existing cases for the contact will be shown with high level details including the date and time it was created on.

To open an existing case click the blue text in 'Case Title' column.

3

Existing Case



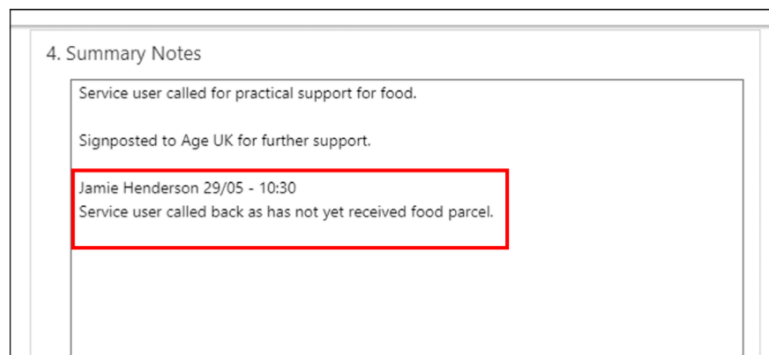
The existing case will now be displayed with the details recorded after the initial contact from the service user.

If the contact you have received from the service user is related to this case then information can be added.

If the contact you have received is not related to this case e.g. the service user has had a food parcel arranged on this case but now needs another, this should be raised as a separate new case. The process for doing this is covered in the next section of this training.

4

Summary Notes



In the 'Summary Notes' section information should only be added, no information should be deleted or overwritten.

Best practice when adding more information is to add your name, the date and time of the call and the content of the update.

5

Save and Close

The screenshot shows a web application interface for case management. At the top, a navigation bar contains several buttons: 'Save & Close' (highlighted with a red box), 'Save & Route', 'New', 'Save', 'Create Child Case', 'Resolve Case', 'Cancel Case', 'Add to Queue', 'Queue Item Details', and 'Assign'. Below the navigation bar, the main content area is titled 'Support for The Person who Called' and is categorized as a 'Case'. There are three tabs: 'Summary' (selected), 'Timeline', and 'Related'. The 'Summary' tab is divided into four sections: 1. Call Details, 2. Caller & Beneficiary, 3. (empty), and 4. Summary Notes. Section 1 includes fields for 'Source', 'Phone', and a 'Consent for Call Back' toggle set to 'yes'. Section 2 includes 'Callers Full Name' (John Washington) and 'Who Requires Urgent Practical Support' (The Person who Called). Section 4 contains a text area with the following notes: 'Service user called for practical support for food.', 'Signposted to Age UK for further support.', 'Jamie Henderson 29/05 - 10:30', and 'Service user called back as has not yet received food parcel'.

When you have updated the case click 'Save and Close'.

Any change to an existing case including entering more information in the 'Summary Notes' section, will notify the data team who can pass on the information to the relevant local Red Cross team.

Summary

To find an existing case you should first find and open the contact, then the case will be shown in the 'Caller Cases' section.

Using the information displayed on the contact record you should ask the caller to confirm the identity of the contact before updating any details.

Information should only be added to an existing case, you should not delete any of the previous notes.

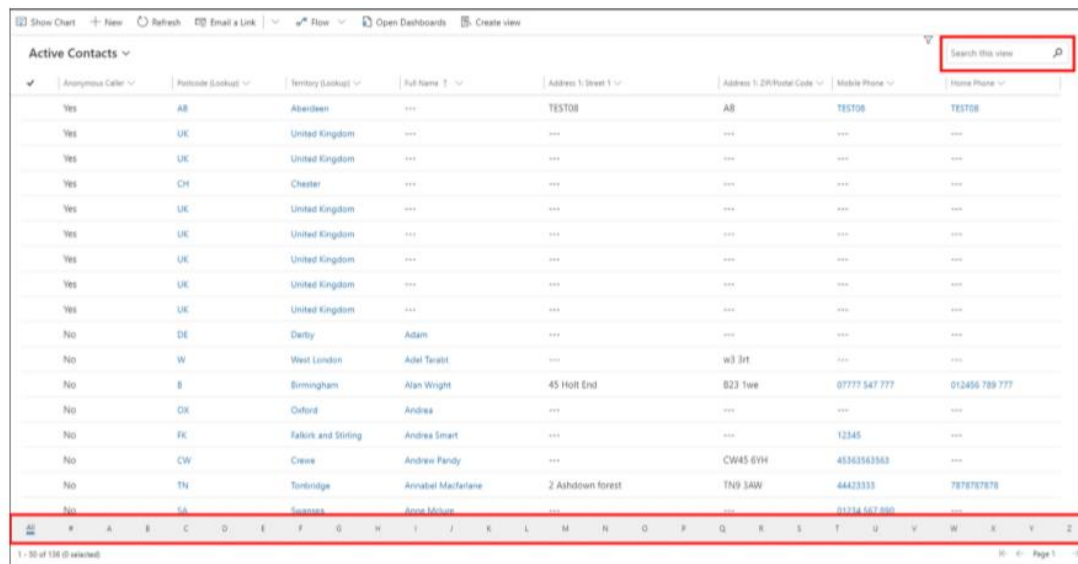
Any update to a record will notify the data team who can then update the local Red Cross team.

8. Existing Contact – New Case

When a caller who has contacted us for help previously calls for help with something new we should find that existing contact and create a new case.

Example: We arranged a food parcel for a service user last week but now they need some practical support getting medication. We should create a new case for the medication support.

Below are the steps to do this in the database.



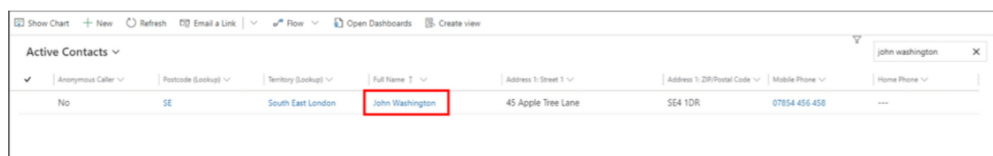
Anonymous Caller	Postcode (Lookup)	Territory (Lookup)	Full Name	Address 1, Street 1	Address 2, 2nd Postal Code	Mobile Phone	Home Phone
Yes	AB	Aberdeen	---	TEST08	AB	TEST08	TEST08
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	CH	Chester	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
Yes	UK	United Kingdom	---	---	---	---	---
No	DE	Dartly	Adam	---	---	---	---
No	W	West London	Adel Terabit	---	W3 3Jt	---	---
No	B	Birmingham	Alan Wright	45 Holt End	B23 1we	07777 547 777	012456 789 777
No	OX	Oxford	Andrea	---	---	---	---
No	FK	Falkirk and Stirling	Andrea Smart	---	---	12345	---
No	CW	Crews	Andrew Pandy	---	CW45 6YH	45363563563	---
No	TN	Tonbridge	Annabel Macfarlane	2 Ashdown forest	TN9 3AW	44423333	78787878
No	SA	Swains	Anna Miley	---	---	01234 567 890	---

The starting point for this is to find the existing contact.

From the homepage find a contact by using the 'Search this view' field, or sorting through the alphabetised records.

1

Existing Contact



Anonymous Caller	Postcode (Lookup)	Territory (Lookup)	Full Name	Address 1, Street 1	Address 2, 2nd Postal Code	Mobile Phone	Home Phone
No	SE	South East London	John Washington	45 Apple Tree Lane	SE4 1DR	07854 455 458	---

Use the information shown on screen to prompt the service user to confirm this is definitely the correct contact record.

No information should be disclosed until you have completed the verification process and confirmed the caller has the right to hear this information.

To open the contact click the blue text in the 'Full Name' column

2

Caller Cases

The screenshot shows a CRM interface for a contact named John Washington. The 'Caller Cases (Save to Activate)' section is highlighted with a red border. It contains a table with the following data:

Case Title	Case Number	Priority	Origin	Customer	Owner	Status	Created On
Support for The Person who Called	CAS-01121-V91053	Normal	Phone	John Washington	JAMIE Henderson	Active	22/05/2020 09:46

The contact will now be shown on screen.

In the 'Caller Cases' section any existing cases for the contact will be shown with high level details including the date and time it was created on.

Click '+ New Case' to start entering the new case details.

3

Existing Case

The screenshot shows the 'New Case' form. The form is divided into several sections:

- 1. Call Details:** Source (Phone), Consent for Call Back (No).
- 2. Caller & Beneficiary:** Caller Full Name (John Washington), Who Requires Urgent Practical Support (The Person who Called), Beneficiary (John Washington), Territory (---).
- 3. Beneficiary Details:** Beneficiary Details (First Name: John, Last Name: Washington, Mobile Phone: 07854 456 458).
- 4. Summary Notes:** ---
- 5. Support:** Psychosocial Support Given (No), Safeguarding Activated (No).
- 6. Local Signposts (Save to Activate):**
- 7. Local Referral (Save to Activate):**

The 'New Case' screen will now be shown and you should enter the details as with any new case.

4

Two Cases

The screenshot shows a contact record for John Washington. The contact information includes: Anonymous Caller (No), Address Line 1 (43 Apple Tree Lane), First Name (John), Last Name (Washington), Postcode (SE4 1DR), Postcode (Lookup) (SE), Region (Lookup) (South East London), Home Phone (---), and Mobile Phone (07854 456 458). Below the contact information is a section titled 'Caller Cases (Save to Activate)' which contains a table of associated cases. The table has columns for Case Title, Case Number, Priority, Origin, Customer, Owner, Status, and Created On. Two cases are listed: 'Support for The Person who Called' with Case Number CAS-01141-73R214, Priority Normal, Origin Phone, Customer John Washington, Owner JAMIE Henderson, Status Active, and Created On 29/05/2020 08:24. The second case is 'Support for The Person who Called' with Case Number CAS-01121-19V003, Priority Normal, Origin Phone, Customer John Washington, Owner JAMIE Henderson, Status Active, and Created On 22/05/2020 09:46.

Case Title	Case Number	Priority	Origin	Customer	Owner	Status	Created On
Support for The Person who Called	CAS-01141-73R214	Normal	Phone	John Washington	JAMIE Henderson	Active	29/05/2020 08:24
Support for The Person who Called	CAS-01121-19V003	Normal	Phone	John Washington	JAMIE Henderson	Active	22/05/2020 09:46

When you have saved the case the contact will now show multiple cases in the 'Caller Cases' section.

Summary

To create a new case for an existing contact you should first find and open the contact, then select '+ New Case'.

Using the information displayed on the contact record you should ask the caller to confirm the identity of the contact before creating a new case against that contact. This will reduce duplication and incorrect data.

