

# Frontline

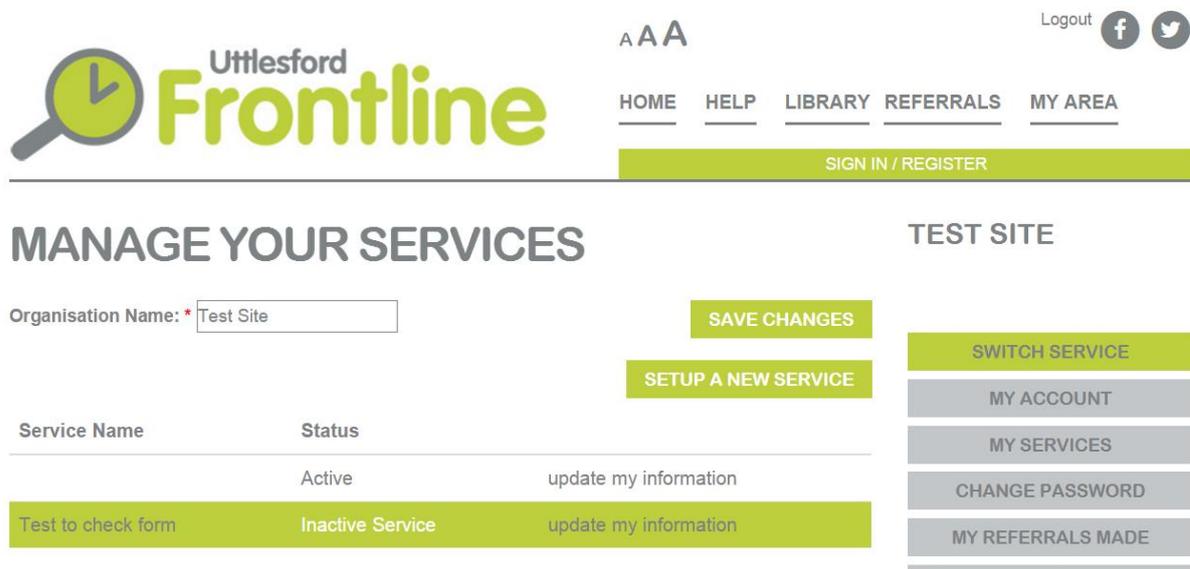
## HELP

Welcome to Frontline, in this section we will cover;

- Registering a new service
- Updating an existing service
- Creating users
- Making a referral
- Receiving a referral
- Making referrals without logging in

## Registering a New Service

Go to My Area and select My Service



The screenshot shows the Uttlesford Frontline user interface. At the top left is the Uttlesford Frontline logo. To the right of the logo are navigation links: HOME, HELP, LIBRARY, REFERRALS, and MY AREA. Further right are social media icons for Facebook and Twitter, and a Logout link. Below the navigation is a green bar with the text 'SIGN IN / REGISTER'. The main content area is divided into two sections: 'MANAGE YOUR SERVICES' and 'TEST SITE'. In the 'MANAGE YOUR SERVICES' section, there is a form for 'Organisation Name' with the value 'Test Site' and a 'SAVE CHANGES' button. Below the form is a table with two columns: 'Service Name' and 'Status'. The table has two rows: one with 'Active' status and 'update my information' link, and another with 'Inactive Service' status and 'update my information' link. In the 'TEST SITE' section, there is a vertical list of buttons: 'SWITCH SERVICE', 'MY ACCOUNT', 'MY SERVICES', 'CHANGE PASSWORD', and 'MY REFERRALS MADE'.

Uttlesford Frontline

Logout  

AAA

HOME HELP LIBRARY REFERRALS MY AREA

SIGN IN / REGISTER

### MANAGE YOUR SERVICES

Organisation Name: \*  [SAVE CHANGES](#)

[SETUP A NEW SERVICE](#)

Service Name	Status	
	Active	<a href="#">update my information</a>
Test to check form	Inactive Service	<a href="#">update my information</a>

### TEST SITE

- [SWITCH SERVICE](#)
- [MY ACCOUNT](#)
- [MY SERVICES](#)
- [CHANGE PASSWORD](#)
- [MY REFERRALS MADE](#)

Click the 'set up a new service' button. You will be asked to provide a service name.

Completing the registration form has been broken into 5 steps.

## Step 1: Background about you and your organisation

### YOUR SERVICE DETAILS

New Logo  No file chosen  
*Leave blank to leave Image unchanged*

Service Name

Administrator Name   
\*

Private email of administrator   
\*

Private contact number   
\*

Service Telephone   
\*

Website address

Company Number   
\*

Charity Number   
\*

Which category best describes you as a referrer

- A logo for your service - this will be shown in the Library of Services (if you choose to promote your service for referrals/signposts) and/or in My Area (to represent that a section of the system is dedicated to your organisation).
- Administrator contact details - we will only contact you if we have a problem with a referral or issue about your service.
- Registrations - If you are a company or charity please provide the correct registration details - if you are an organisation that doesn't have this form of registration, please just place a dash in the field.
- Category - Please click the drop down box and select the type of organisation you most reflect (this will ensure that organisations that would like to receive referrals from you are accessible through the system).

## Step 2: Your requirement to send or receive referrals

In the next part of the form, we simply ask you if you would like to make and/or receive referrals.

If you want to be on the library for signposting only, i.e. do not want to receive referrals, but do want to send referrals - just state that you will accept referrals and then avoid ticking any organisations to accept referrals from (see below).

Step 3: How you would like to appear on the library and who you would like to receive referrals from (only required for services wishing to go on the library and receive referrals)

If you have agreed to accept referrals, you will be asked to provide an email address where we can send notifications of referrals. When a notification is sent it contains a link and the user is prompted to sign into the system to access the referral details.

You will be prompted to tick the categories of organisations you will accept referrals from and choose one or more parts of the library you would like to promote your service in. If you do not receive referrals, you will only see the question 'Where would you like to appear in the library'. If you want to appear on Frontline for signposting, tick the appropriate category box. If you do not want to appear in the library, e.g. you are a GP Surgery, school etc do not tick any box.

If you have opted to receive referrals, you will be asked if you will allow self-referrals from the public, we call these call-back requests, but essentially the system treats them like a referral (calling them direct referrals) and you will be notified by email.

If you state that there is a cost to the service, a red pound sign will appear clearly on your service details on the library. You can add information on these charges later in the form.

Step 4: Geographic coverage, offices and outreach locations

### WHAT LOCATIONS ARE YOU ABLE TO PROVIDE YOUR SERVICE FROM?

Address 1	<input type="text"/>
Address 2	<input type="text"/>
Town	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>
Opening Times	<input type="text"/>

#### Areas covered by this office

- Essex
- Epping Forest
- Harlow
- Uttlesford

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**DOES THIS SERVICE OPERATE FROM ANOTHER OFFICE?**

Do you provide home visit services?

In this area we collect the locations that each service works from - you can add more locations by clicking 'Does this service operate from another office'. It's important also to add geographic coverage for each of your offices to ensure that someone searching a particular location only finds services that actually deliver in their postcode area. If you provide a home visit service, a new box will pop up to clarify coverage - you can select down to ward level if necessary.

Unless you are involved in the Broxbourne Citizens Advice/Hertfordshire Council agreement, please do not click in the Hertfordshire box.

### Describing your service (only required for services that wish to go on the library)

This information will be read and printed from the system, so please ensure the language is clear and details are accurate. You can add cost information here if relevant under "Who can use the service".

#### Your information for the library:

This information will help the general public and other services understand how your service operates in the district

Service description \*

Who can use the service? \*

How are services delivered? \*

How accessible is your service?

Keywords

Adding referral fields (this area will only appear if you have agreed to accept referrals)

The system requires all referrals to contain a mandatory level of information, including name, address and telephone number. Services that receive referrals can then create additional fields for their own specific needs – for example

**Is there any other information you require in referrals?**  
Add them as extra inputs here

Name	Type	Required?
<input type="text" value="Can we leave a message"/>	<input type="text" value="Text Line"/>	<input checked="" type="checkbox"/>
<input type="text" value="Age of children"/>	<input type="text" value="Paragraph"/>	<input type="checkbox"/>

The fields you create can be made mandatory by ticking the required box. Please note that fields must only be added to guide users, allowing a good referral – for data assurance reasons we only want to collect essential information.

Select one of the following at the end of the form:

- Save and preview pdf – if you appear on the library, this will be what users see when they click on 'Details'
- Save for later – when you come back you can make more changes, but it will not be submitted
- Save and submit for review

After you submit this form on-line it will be sent to the Frontline system administrator who will check your application and either contact you to clarify any matters or make it live. It's very easy to revise this form at any time if details about the service change, see below.

# Updating an Existing Service

Go to 'My Area' and select 'My Services'

Uttlesford Frontline

AAA Logout

HOME HELP LIBRARY REFERRALS MY AREA

SIGN IN / REGISTER

## MANAGE YOUR SERVICES

Organisation Name: \*  [SAVE CHANGES](#) [SETUP A NEW SERVICE](#)

Service Name	Status	
	Active	<a href="#">update my information</a>
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TEST SITE

[SWITCH SERVICE](#)

[MY ACCOUNT](#)

[MY SERVICES](#)

[CHANGE PASSWORD](#)

[MY REFERRALS MADE](#)

Select an existing service by clicking 'update my information'.

Make the changes you need and select one of the following at the end of the form:

- Save and preview pdf – only relevant if you appear on the library, this will be what users see when they click on 'Details'
- Save for later – when you come back you can make more changes, but it will not be submitted
- Save and submit for review – your changes will be sent to the Frontline system administrator who will check the details before making it live.

# Creating a new user

Go to 'My Area' and select 'My Users'.

[ADD USER](#)

User	Contact Email	Permissions
Test Referral		Service Administration Can Make Referrals Can See All Referrals Can Create Users
Sally Test		Can Make Referrals Can See All Referrals
sarah Ptest		Can Make Referrals Can See All Referrals
Nick Test		Can Make Referrals Can See All Referrals

Click the 'Add User' button and enter first name, last name and email address of the new user. The user's email must not already be registered on Frontline. If an existing user wants to access a service under a different organisation they will need a different email address.

Tick to allocate permissions to the user. Whether they can make referrals, see details of other users' referrals, act as another administrator and create users.

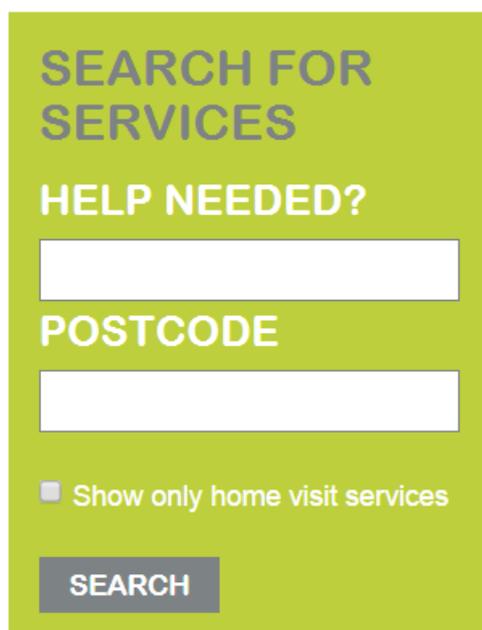
If a user leaves your organisation, please remember to suspend their account.

If a user forgets their password, you can re-send their details by email by clicking 'Reset/Resend Invite' or you can remind them that they can easily re-set their own by going to 'Sign In/Register' and clicking 'Forgotten your Password'.

## Making a Referral

After signing in, or using the IP address function (see 'Making Referrals without Signing In') go to the library. Search for the service using a key word like 'debt' or 'fall' or use the name of a service – as you type the directory will filter.

You can enter a postcode; then a 'distance to' to see only nearby services.



**SEARCH FOR SERVICES**

**HELP NEEDED?**

**POSTCODE**

Show only home visit services

**SEARCH**

Click the 'Refer' button of the selected service and enter the client's details as fully and thoroughly as possible (For GP surgeries there is the possibility to merge data

directly from EMIS or SystemOne, please contact us for details). All data is confidential and redacted after 90 days.

You can attach a supporting document by clicking on the “Choose File” button and navigating to the file stored on your computer. Once you have selected it, click “upload” and wait for the name of the file to appear on the page.

On the bottom of the form there are two boxes for Client consent - to being contacted and to being surveyed about their experience. You must tick ‘Please confirm that verbal consent has been received from the client’ for the referral to be submitted.

Once you have filled in the information required simply click on the green “Submit” button. An email will now be generated to the service provider which contains a link to the referral you have created. We ask services to aim to acknowledge the referral within 3 working days and close the referral within 10 working days.

To review the progress of a referral, please go to ‘My Area’ and ‘My Referrals Made’. You will be able to see if the referral is pending/ acknowledged or complete. You will also be able to see the name of the person handling the referral and obtain a basic update. For example ‘We have contacted the client and they have an appointment on XXX’

## Receiving a referral

You will be notified of a new referral by email to the address you nominated when setting up the service (this can be amended by going to ‘My Services’). You will be prompted by the email to sign in. Then go to ‘My Area’ ‘My Referrals Received’.

## REFERRALS RECEIVED

Created 17-11-2015 10:36	PENDING
Kate Test	
07654 321000	
	<a href="#">VIEW</a>

The referral summary states that the referral is pending. To action the referral click on 'view' to open more details.

After reviewing the referral details you have two options, either reject the referral or acknowledge the referral. If you reject the referral, you will need to state a reason. If you acknowledge the referral, the user's name and time of the action will be recorded on the system and shared in real time with the referral provider.

You will then have three options, to close the referral (for example, you may have called and actioned the referral immediately), to update the referral (for example, we will action this on Monday when our adviser is next in), to click 'contacted attempted' (this just records that you have tried to call the client at a given time).

It is helpful as a service to set a policy for closing referrals especially if you are unable to contact the client. For example – 'we will try on three separate occasions to contact the client by phone on different days, after this point if we are unsuccessful we will write to the client (if permission is given) and close the referral'. Attempted contact should be recorded on the referral.

As soon as you have contacted the client and agreed action, you should close the referral. If you have not closed the referral within 10 working days you will be contacted by our administrator.

## **Making Referrals Without Signing In**

If you work in a fixed location and do not share your router with the public or other non-linked organisations in your building - it may be helpful to register the IP address of your router with Frontline.

The advantage of registering your IP address is that your account users will be able to search the library and send referrals without logging in. Clearly for information security, if you want to access referral information after you have sent a referral you will need to log in.

Registering is easy if you are set up as an administrator.

- 1) Sign in to Frontline, go to 'My Area' 'My Account'
- 2) Click on 'Use this IP address' or enter the IP address of your location into the 'Your IP address' field and save changes.

# UPDATE YOUR DETAILS

First name:

Surname:

Email:

Confirm Email:

Your IP Address:

Your current IP address is **72.353.113.35** (use this ip address)

When you go into Frontline in your office, you will now enter straight into the library. You will still need to log in to access My Area functions.