CABLearn
Flexible learning for the CAB service

Petra for new Gateway Assessors and Generalist Advisers

CUSTOMISED FOR SHEFFIELD

July 2013
Customised
Sept 2013

Gateway Skills 1 and Adviser Skills 1

The content of this workbook reflects best practice as set out in the Petra on-line help which can be accessed via CABlink which has been adapted and customised for the launch of Sheffield Citizens Advice.

There are a variety of other training materials on the Petra Training Page of CABlink. Working through this book will give trainees an overview of Petra and when used in conjunction with the Petra Training site will give hands on practice of the main areas which most CAB staff and volunteers will be expected to use on a daily basis. This book will provide a good starting point for using Petra.

Please bear in mind that the Petra Training site does not allow practice of certain functions

You need:

- Secure internet access to CitA systems to access Petra
- Internet access – www.adviceguide.org.uk

Please do not write in this pack. Other learners will want to use it after you.

Petra Training site:

This can be access as long as the internet connection at the site is already connected to the Citizens Advice VPN ("Virtual Private Network") at

http://cabpu-crmweb1.cabsrv.org.uk/training

Sheffield Citizens Advice has a mini version of part of the new structure set-up in the training site. See diagram on the last page of this pack

The "Member Bureau" is called Sheffield Citizens Advice

It has 3 "demo" outlets:

Spital Hill (formerly known as Pitsmoor)

Proctor Place (formerly known as Hillborough)

Duke Street (formerly known as Sheaf Duke Street) which also has the Outreach facility @ Manor Library attached to it.

The "Live" version will have all the main & outreach sites within it. As a User you will have a log-in attached to one main site- but you can log-in and record activities at different sites within the organisation if you are working between different sites.

TRAINING LOG-INS FOR SHEFFIELD CITIZENS ADVICE AND LAW CENTRE

PLEASE NOTE THAT YOU MUST NEVER SHARE PERSONAL LOG-INS FOR THE LIVE SITE OR TRANSMIT THEM BY EMAIL

WHOOPS! - THE SPITAL HILL DEMO LOG-INS HAVE BEEN MISSPELT WITH TWO "T"S

Bureau Sites	User Ids	Password
Duke Street	dcabcrm\Duke1	Advice2415
Duke Street	dcabcrm\Duke2	Advice9722
Duke Street	dcabcrm\Duke3	Advice9867
Duke Street	dcabcrm\Duke4	Advice9163
Duke Street	dcabcrm\Duke5	Advice4435
Proctor Place	dcabcrm\Proctor1	Advice1197
Proctor Place	dcabcrm\Proctor2	Advice6488
Proctor Place	dcabcrm\Proctor3	Advice7423
Proctor Place	dcabcrm\Proctor4	Advice1758
Proctor Place	dcabcrm\Proctor5	Advice3462
Spittal Hill	dcabcrm\Spittal1	Advice1146
Spittal Hill	dcabcrm\Spittal2	Advice2858
Spittal Hill	dcabcrm\Spittal3	Advice1873
Spittal Hill	dcabcrm\Spittal4	Advice2574
Spittal Hill	dcabcrm\Spittal5	Advice4790

KEY TO SITE NAMES AND PREDECESSOR ORGANISATIONS main bases:
Bawtry Road = Tinsley Advice Service
Broadfield Road = DSU and CLASSY
Duke Street = Sheaf Duke Street
London Road = Sheaf London Road
Michael Carlisle Centre (& Longley Centre) = Sheffield Mental Health CAB
Proctor Place = Hillsborough & Area Advice Service
Spital Hill = Pitsmoor CAB
Stubbin Lane = Firth Park Advice Centre
Woodhouse = South East Sheffield CAB
Wordsworth Avenue = Foxhill & Parson Cross Advice Service
Others by Remote access tokens initially.
Creswick Street= Langsett Area Advice and resource centre
DASS @ VAS,
Stocksbridge Library,
Woodseats Lib,
Manor Lib,
Darnall Lib/Darnall Family Dev centre/Darnall Wellbeing

Contents

Section 1 - Key terminology in Petra:

Activity

An action that has been performed, or has been scheduled to be performed in the future. This includes all contacts with a client and with third parties on behalf of a client, such as face to face meeting, phone calls, letters, appointments and service appointments. You can attach an activity to a client, an enquiry, or you can create an unlinked activity. ***{Sheffield Citizens Advice has not yet decided a standard policy on use of "Tasks" facility within Petra}***

Enquiry

One or more enquiries will be linked either to a gateway assessment record, or directly to a client record (in special circumstances) as a record of the issue for which the client has contacted Citizens Advice.

Enquiry Note

One or more enquiry notes are linked to an enquiry as a record of all contact made with and on behalf of the client. ***This is where detailed casenotes are kept***

Gateway Assessment

In Petra the gateway assessment to take initial client information is a separate record from the enquiry. One or more enquiry records can be attached to a gateway assessment record.

For VCC assessors this record will replace the information currently kept on SHEP.

Citizens Advice will in future allow some limited customised "discrete" advice casenotes to be included in this field where this is done at the initial client contact. Up to 4 Advice Issue Codes (formally called stats or social policy codes) can now be included with the Gateway record).

Please note that the "Next Steps" field records important information about what happened after you first assessed the client's problem- please see guidance in this pack about how to record this for Sheffield Citizens Advice so that funders can get the information that is needed.

Information Assurance (IA)

Information assurance is defined by Government Communications Headquarters as: "the confidence that information systems will protect the information they handle and will function as they need to, when they need to, under the control of legitimate users."

NOTE IT IS MANDATORY THAT ALL PETRA USERS COMPLETE LEVEL ONE DATA PROTECTION ON-LINE TRAINING BEFORE USING PETRA- AND RENEW THIS REGULARLY.

Data Protection Training
http://elearning.citizensadvice.org.uk/IA/pi_level1/default.htm

Data Protection Assessment
http://elearning.citizensadvice.org.uk/IA/pi_level1_yr2_assessment/

(Please note: These links only work in Internet Explorer)

Local Classification Codes

Local classification codes are ways for individual bureau to classify and report on enquiries according to local needs. ***Sheffield Citizens Advice will be adding details of any local codes as soon as possible after launch.***

Outcomes

Outcomes are classifications you apply to enquiries when you close them, to indicate the final result. These can be reported upon, and are especially useful for specialist work, but should also be used for generalist work too, to help with reports (we) may need to send to our Funders. ***Sheffield Citizens Advice wants to improve on the recording of outcomes so that we can better explain the purpose of our work to the City Council and other funders. Further advice and information on Outcome recording will follow- but in general it is good practice to enter all information you have about advice outcomes on the fields available (there are over 200 options split down over each of the main issue types).***

Reports

Reporting in Petra can offer both simple counts and more detailed breakdowns of clients, gateway assessments and enquiries according to many different criteria you may want to generate reports on. There will be a dedicated reporting area of Petra for you to access the report catalogue, and you will also be able to use Views to construct some searches to do quick counts of records fitting your

criteria. ***Sheffield Citizens Advice will be looking into which standard and customised views will be most useful for our funders and projects. Once Petra has been implemented and we have more practical experience with it we will also work with staff and volunteers to develop customised "views" which will be useful for all aspects of advice work.***

Roles

Roles are the way that Petra collates permissions so that you can easily set up your users with the access to Petra that they need. In Petra if you are given more than one role you will still only need to login once, because Petra needs to look at all of the different roles you have, to work out whether you have the permission to access or edit a record. ***Sheffield Citizens Advice has a simplified approach to this. We have agreed to consider 5 sets of roles that advisers typically need in our settings to make sure that staff have the functionality they need to do their job. You will be told what set of roles go with your log-in. If this does not work smoothly for you let us know so that any errors can be cleared up.***

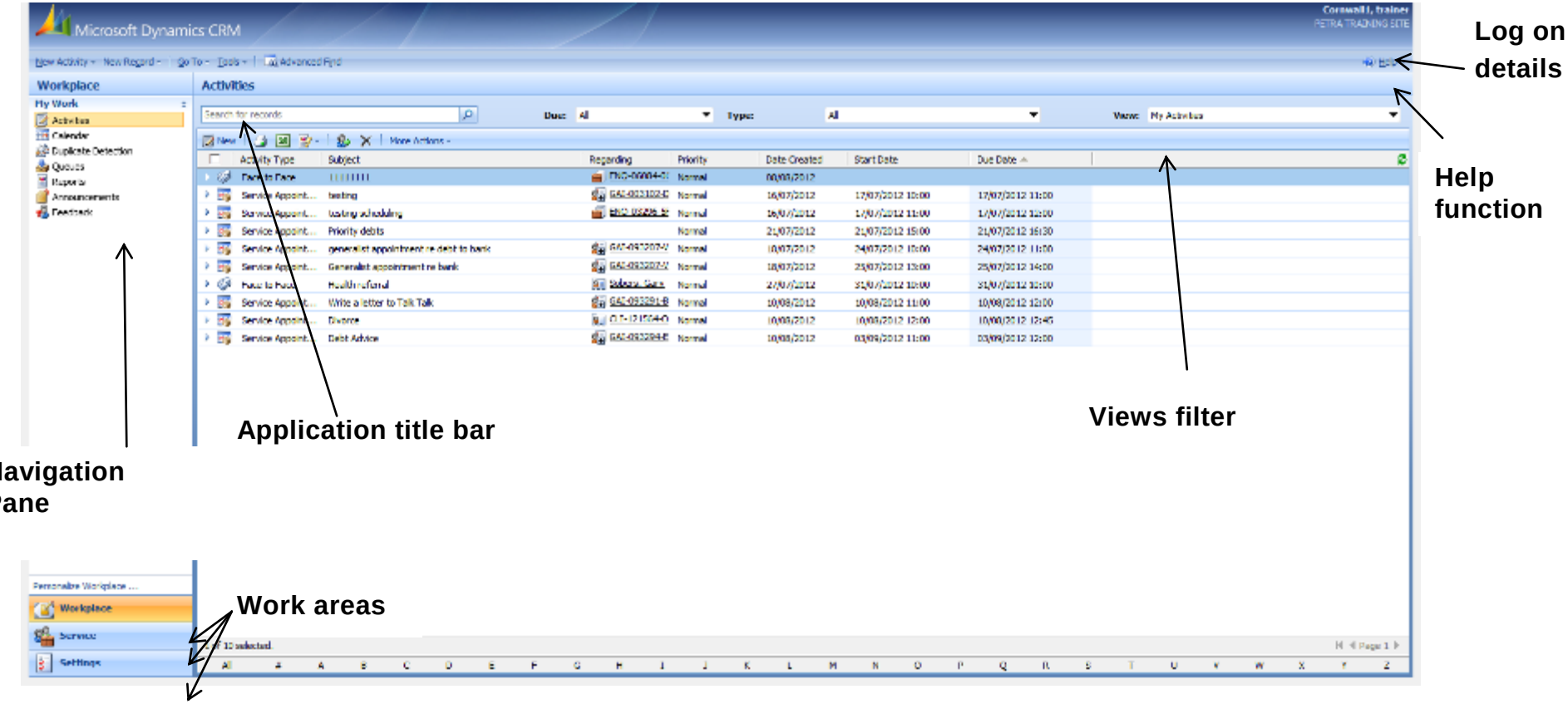
Service appointment

Sheffield Citizens Advice will continue to use nellBOOKER for scheduling client appointments for the timebeing.

Tabs, tabbed browsing

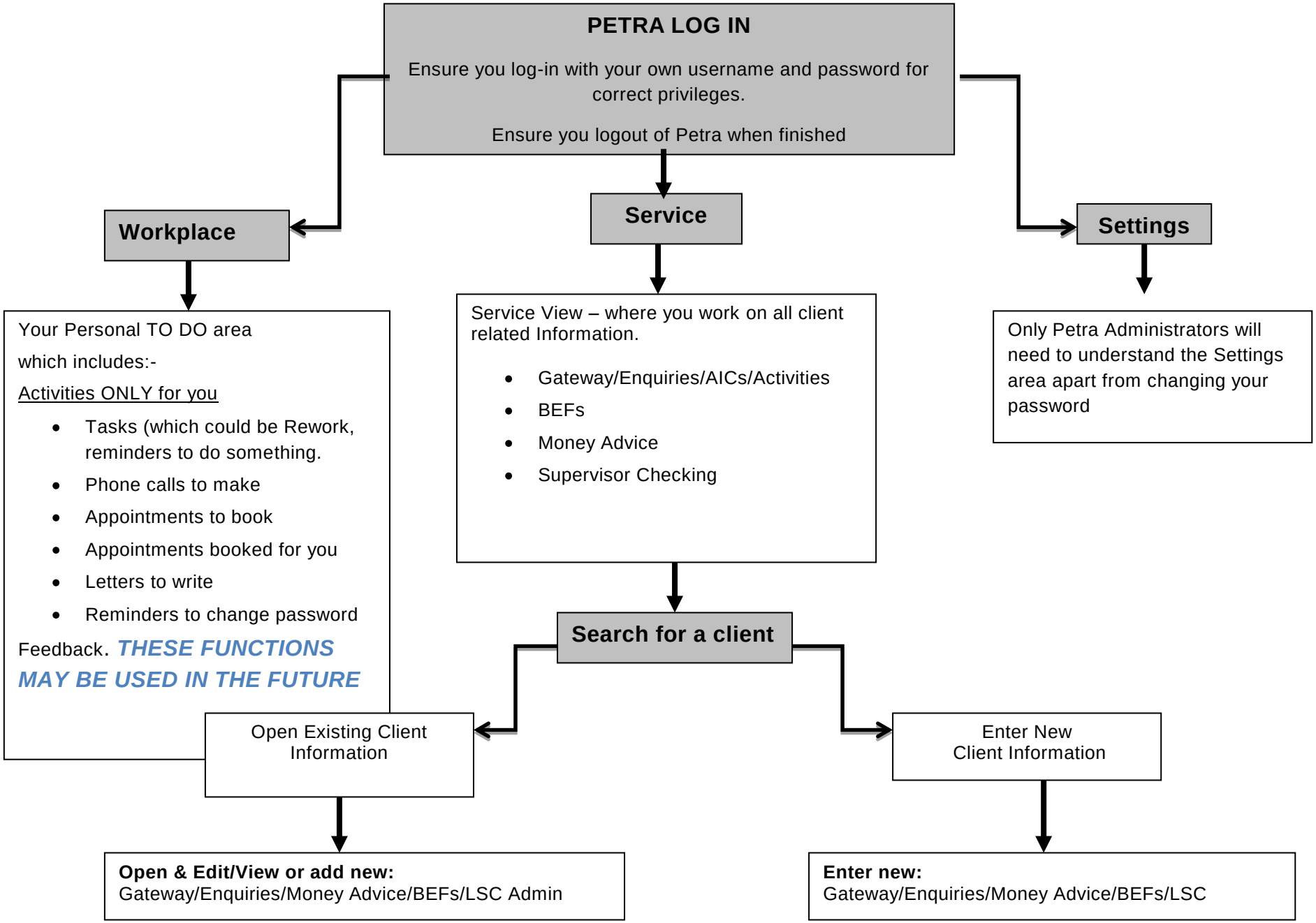
Tabbed browsing is a common feature of modern internet browsers like Internet Explorer 7 and above, and should significantly improve your experience of using Petra. Instead of new screens opening up in new windows, they open up in a series of tabs along the top of your browser window, so you can move back and forth between Client, Gateway and Enquiry details. You can also open different Clients in tabs, or multiple Enquiries, or any combination of Petra screens that you'd like.

> ***Sheffield Citizens Advice hopes to ensure that all PCs and laptops have been set for tabbed browsing in advance of using Petra. Please alert your supervisor if it is not working on the machine you are using.***



MANDATORY FIELDS IN PETRA ARE ALWAYS IDENTIFIED BY BEING DISPLAYED IN RED AND MARKED WITH AN ASTERISK-.

In ADDITION we have marked some other fields in this pack which are local mandatory fields- must be completed by all advice staff working for Sheffield Citizens Advice.


PETRA LOG IN
Ensure you log-in with your own username and password for correct privileges.
Ensure you logout of Petra when finished
Workplace
Service
Settings
Your Personal TO DO area
which includes:-
Activities ONLY for you
Tasks (which could be Rework, reminders to do something.
Phone calls to make
Appointments to book
Appointments booked for you
Letters to write
Reminders to change password
Feedback. THESE FUNCTIONS MAY BE USED IN THE FUTURE
Service View – where you work on all client related Information.
Gateway/Enquiries/AICs/Activities
BEFs
Money Advice
Supervisor Checking
Only Petra Administrators will need to understand the Settings area apart from changing your password
Search for a client
Open Existing Client Information
Enter New Client Information
Open & Edit/View or add new:
Gateway/Enquiries/Money Advice/BEFs/LSC Admin
Enter new:
Gateway/Enquiries/Money Advice/BEFs/LSC

Section 2 - Key roles:

- You will be assigned "roles" that reflect the types of work you need to do on Petra as part of your job or volunteering. Each user will have only one username and password for log in and all their roles will be covered under this one login. Once logged in, users will then have access to the areas within Petra that they need.
- Petra has been set up with a long list of different "roles" so for Sheffield Citizens Advice we have bundled these up into 5 main sets of roles that aims

BUNDLES OF ROLES for Sheffield Citizens Advice are:

Member Administrator(s)

Bureau / Site Administrator(s)

Receptionist / clerical / admin

Case worker / advisor / assessor - non approver

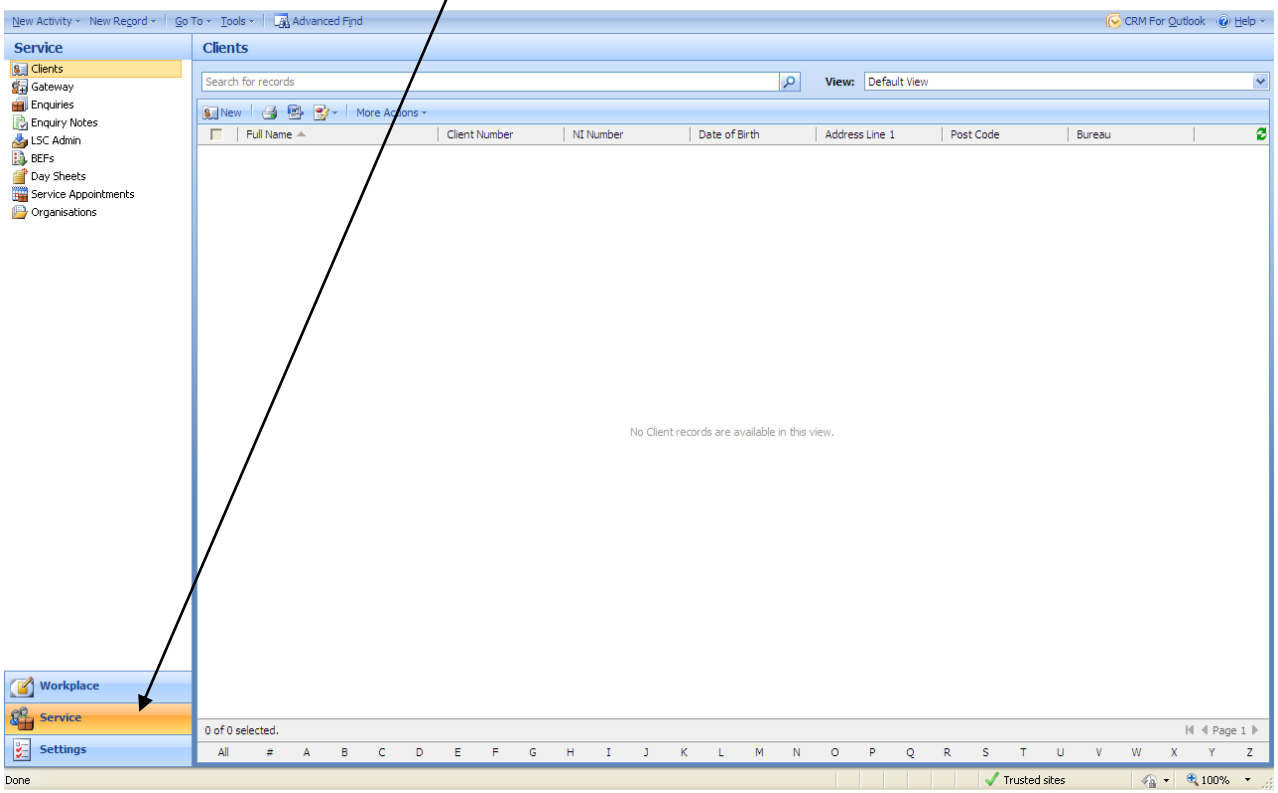
Case worker / advisor / assessor - approver

Social Policy Co-ordinator

If you find you have not been set up in a way which allows you to do your job please your supervisor or site administrator know so that this can be sorted out.

Section 4 - Searching and adding a client

When you have logged in, select Service from the 3 buttons at the bottom left of the screen.



This will then take you to the client area of Petra. You now need to search for your client.

Using the Quick Find for finding clients-

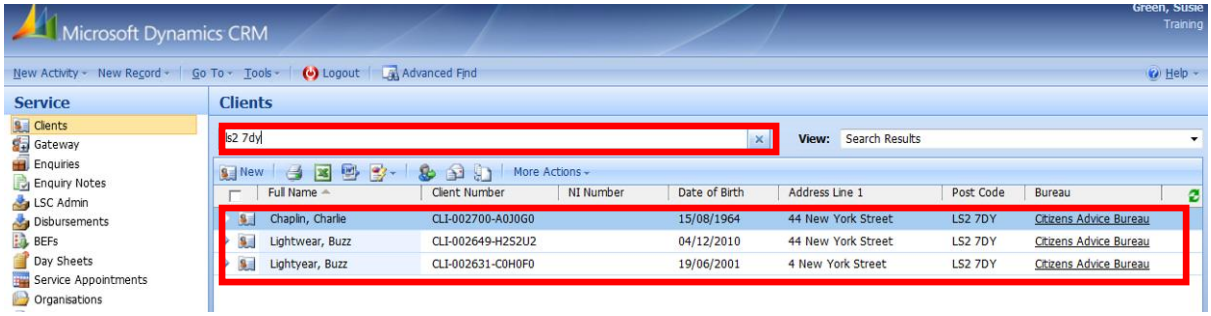
-only for clients you already know are on the Petra system - with significant details for searching inc postcode- or an unusual name would be OK.

The Quick Find function allows you to enter criteria for searching directly into the main Clients screen after selecting Service on the bottom left. BUT - when using the quick find function for finding your clients on Petra it is vital to remember that this is now a **NATIONAL** database, so you have to make sure you put in data that will ensure you don't get thousands of results. So, just a client's surname would be insufficient, unless it is extremely unusual. The wildcard for searching within Petra is the * symbol. Make use of the wildcard to shorten your searches. As a general principle, use Quick Find for quickly accessing client records that you know already exist in Petra and the Advanced Find for a more rigorous

search when you are unsure whether the client record has already been created in Petra.

The Quick Find facility is by far the quickest way to get to your client, but remember some simple rules:

1. Unless there is a **valid reason for not doing so, start with the postcode** – this will ensure that you only return a small number of results.

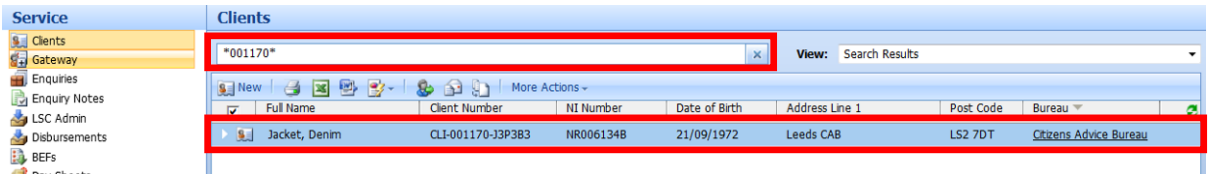


2. Use the client first name and surname, making use of the wildcard - * - to help you. You have to enter the surname first, followed by a comma then a space before the first name. For example, if your client is named Amy Butler, you might use one of the following search criteria:

Butler, Amy	This is only going to return a client with this exact name
Butl*, Am*	This will return any client whose first name begins with Am and surname begins with Butl
But*, Am*	This will return any client whose first name begins with Am and surname begins with But

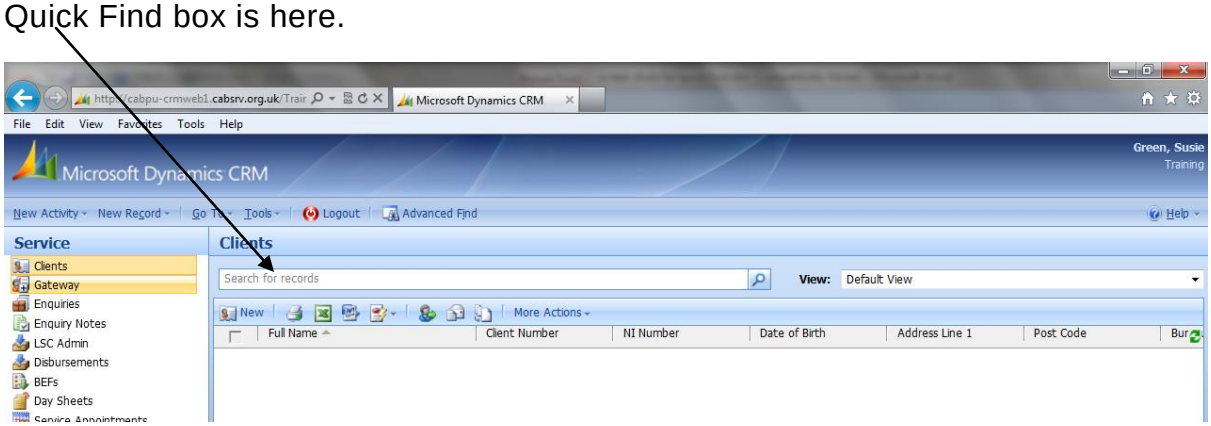
3. If you have it, look for the client record by the URN (unique reference number). However, this is quite a long number, for example: CLI-001170-J3P3B3. Using the wildcard, this can be shortened to just the number in the middle, as follows:

   001170

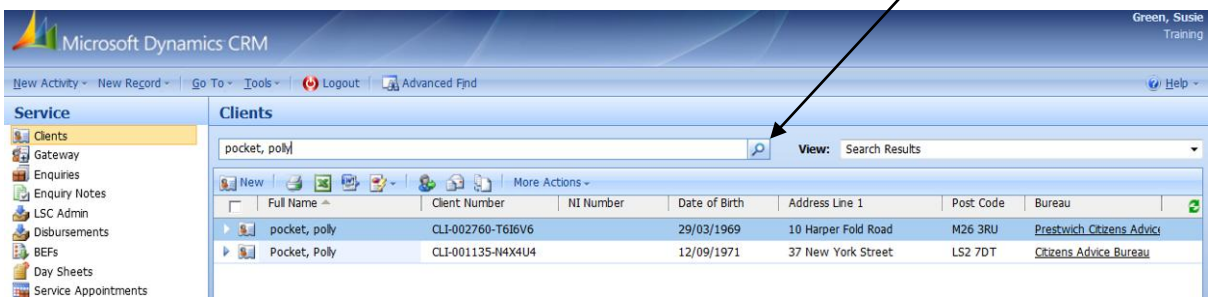


The Quick Find is used as follows:

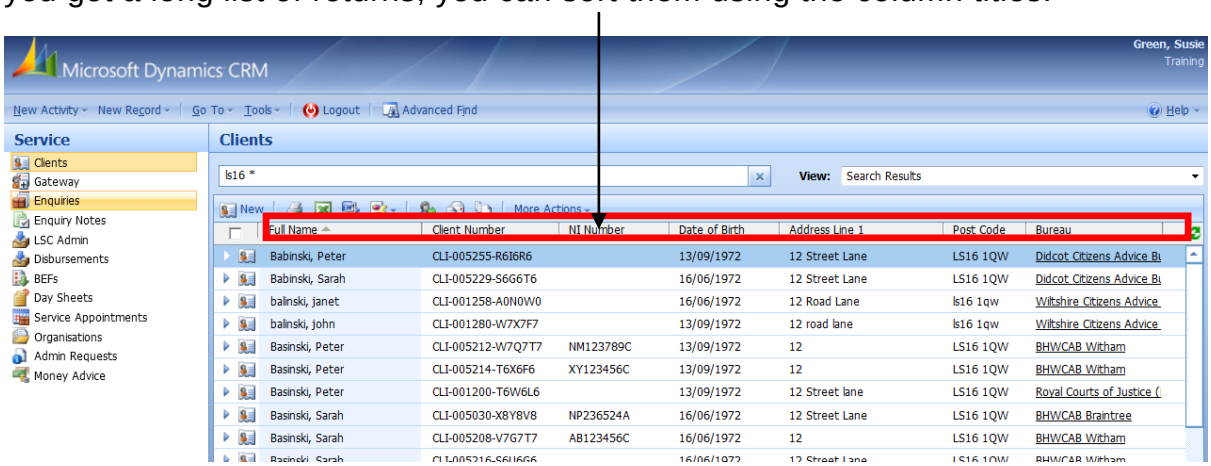
With Service selected at the bottom, select Clients from the left hand pane. The Quick Find box is here.



You can now enter your search criteria, and then either press return, or click the search icon to get the results.



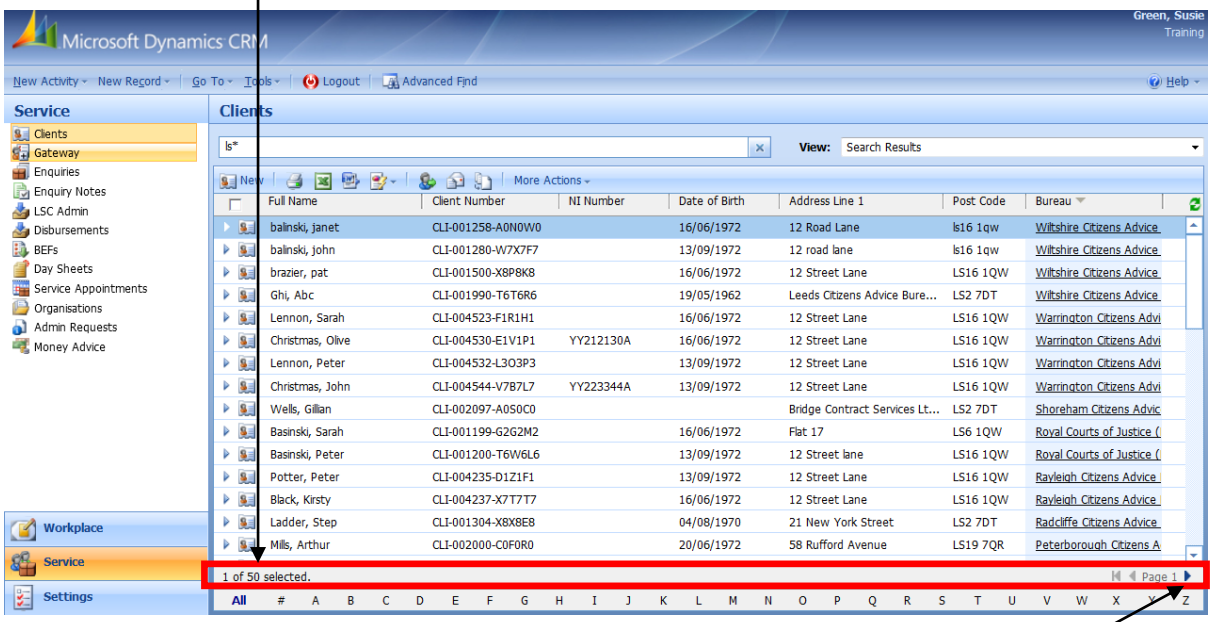
The results will show in the main screen. If you need to search again, then you can simply overwrite the data in the Quick Find box, you don't need to delete it first. This way of searching is much quicker, but you do have to be selective. If you get a long list of returns, you can sort them using the column titles.



By clicking on any of the column headings, the data will then sort alphabetically or numerically. If you click it again, it will reverse.

NB. The name field is automatically shown in alphabetical order, with the surname first.

If your search is not specific enough, then you could be returned literally thousands of results. The system will only show 50 at a time

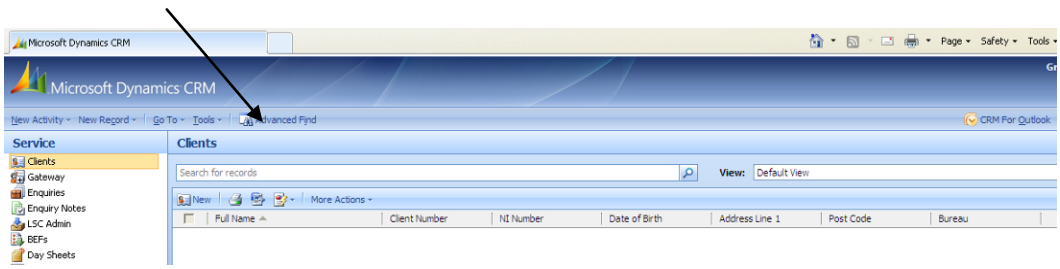


You will know there are multiple pages to view as the arrow to the right of Page 1 will be highlighted.

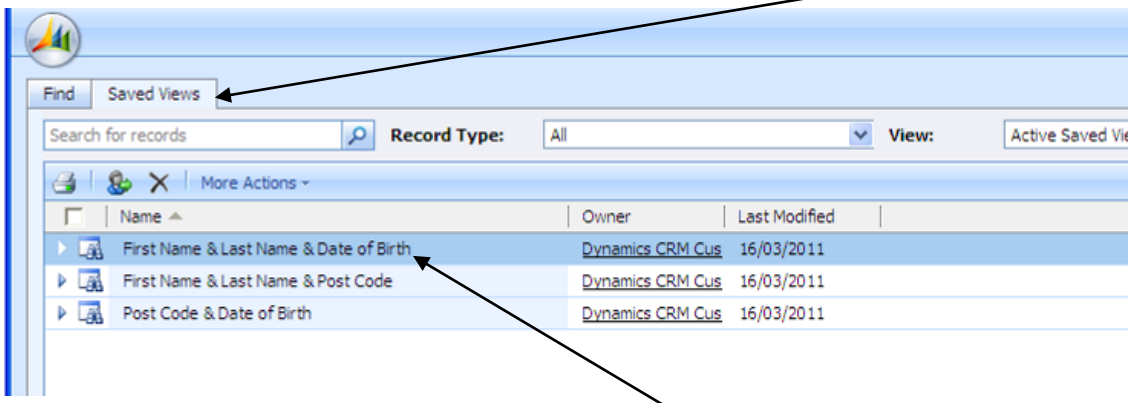
Advanced Find- MORE POWERFUL SEARCH. THIS SHOULD BE USED ROUTINELY FOR ALL CLIENTS UNLESS YOU KNOW THEY ARE ALREADY ON PETRA

FOR CLIENTS WHERE YOU HAVE INSUFFICIENT DETAILS TO NARROW A SEARCH TO A FEW CLIENTS WITH A SINGLE CRITERIA, FOR EXAMPLE A ONLY COMMON NAME AND NO POSTCODE"

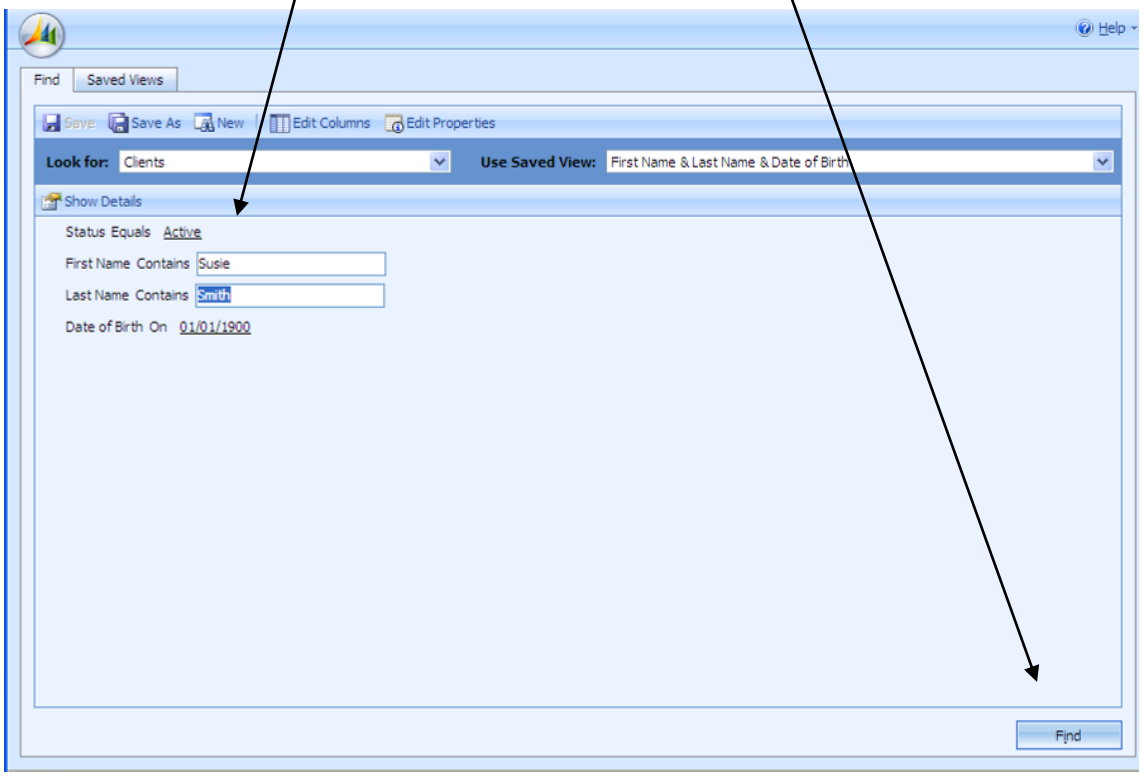
If you prefer to be more specific in your search, another option is available. Select the Advanced Find button.



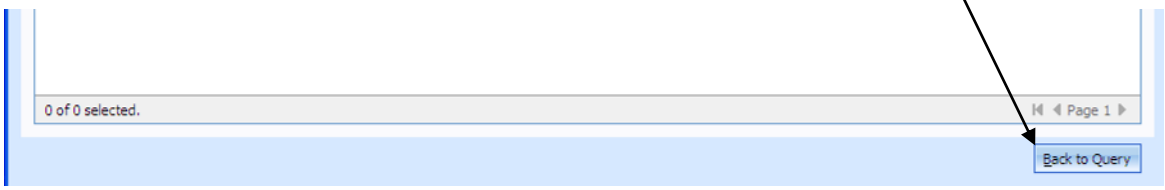
A new screen will appear for the Find function. Click on the Saved Views tab.



You will now have a list of options-look at the bottom section called "My Views". Select the top option by double clicking and enter the details that you need to search for. Examples of what to write are already entered. Click on each box and type in your entry, then click on Find.



You should now get a new screen with a message stating no client records are available in this view. If you want to search again select the Back to query button at the bottom of the screen.

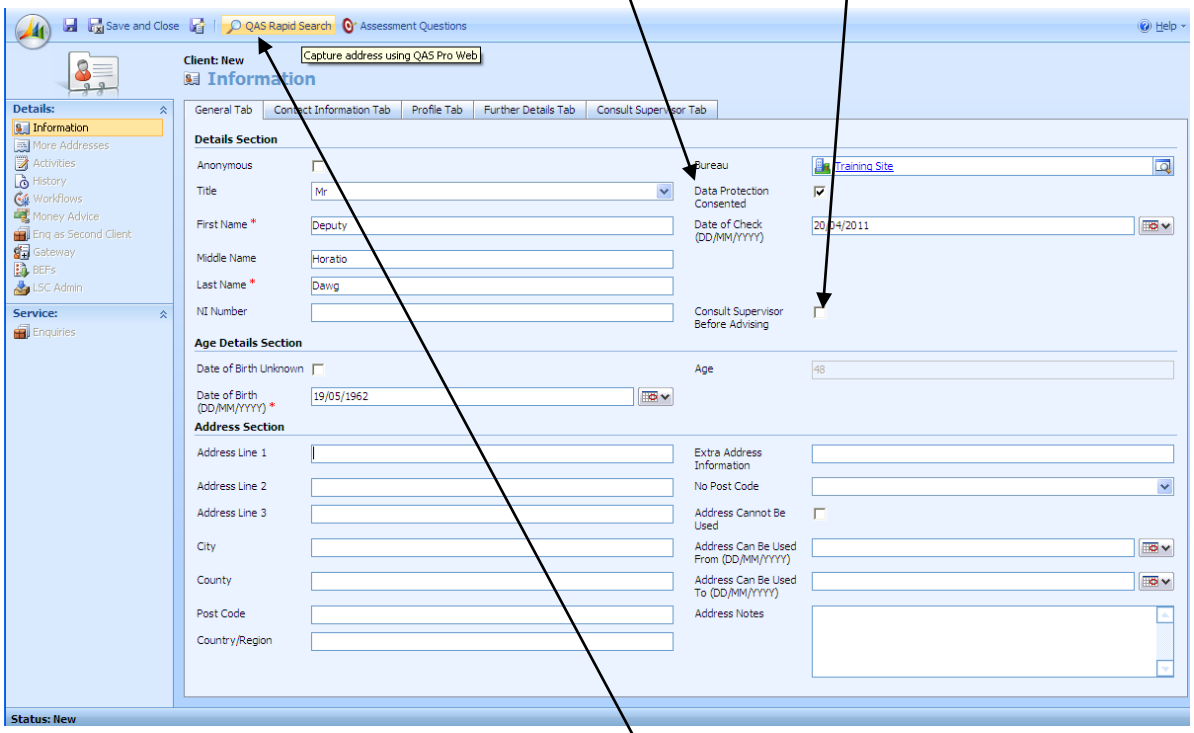


Close this window as no clients have been found, and return to the main page. As you know your client is not on the system, you can now enter their details.

Adding a client

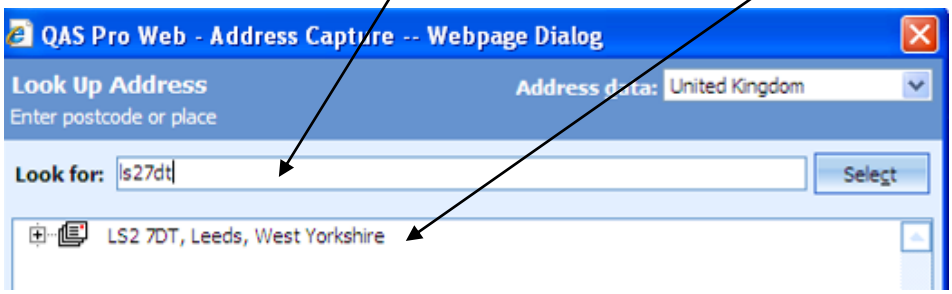
Click on the New button, and a new screen will open ready for you to enter your client information. Make sure you tick Data Protection Consented to show you have permission to record the client's information.

If there are specific issues with handling a client (for example if they have serious memory difficulties which need sensitive handling) you may use the field marked "Consult supervisor before advising"- this will lead to an information tab. Any information here may be viewed by the client.



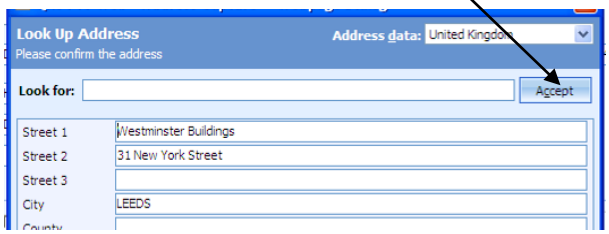
When you get to the Address Section, **ALWAYS** select the QAS Rapid Search button. ***Do not type in the address directly as this will not allow correct statistical recording of clients residence.***

Type your postcode into the search box, and the system will find it.

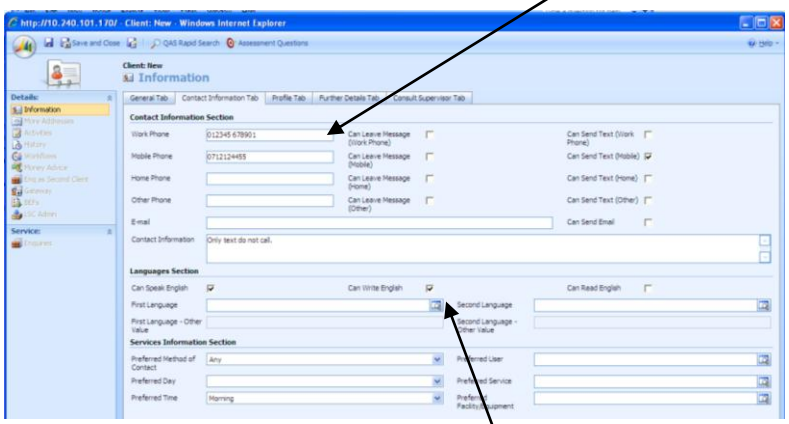


Sometimes the words 'QAS Rapid Search' will not show and only the icon will be there. To be able to tell which icon to click for the address search, hover over the icon with the mouse cursor and a small help line will appear for a few seconds with the words 'QAS Rapid Search' – you can now click the icon to proceed with the address search.

To select an address, click the + next to the address, then select the correct address from the list, and then select Accept. You can edit the address before you select Accept if you wish- ***for example to add a flat or room number to a building.***



Your client's address details are now added to the main client screen. Once you have completed these details, click on the Contact Information Tab. Fill in the relevant contact details.



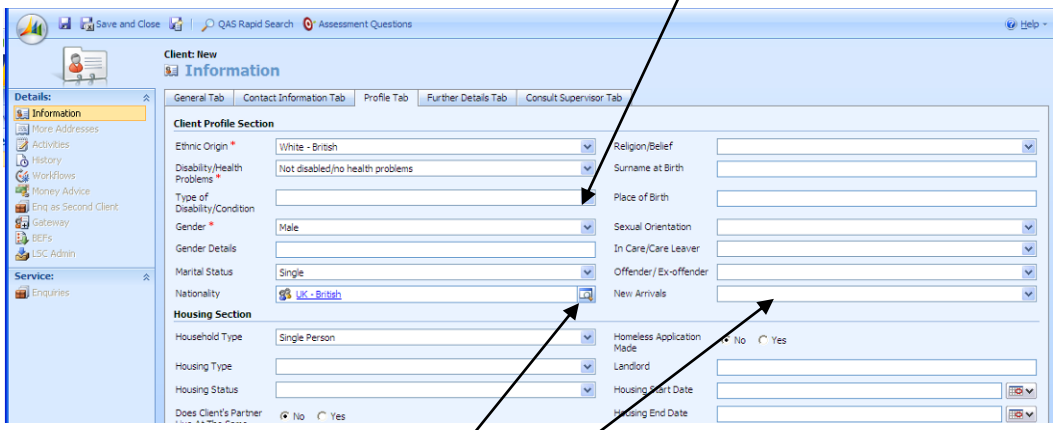
NOTE THAT PETRA WILL NOT REMIND YOU TO ENTER A TELEPHONE NUMBER BEFORE YOU SAVE THE RECORD. YOU MUST CLICK TO THE CONTACT DETAILS TAB AND ENSURE TELEPHONE NUMBERS ARE COMPLETED (OR NOTE IF THERE IS NO PHONE)

For monitoring purposes, as well as practical reasons, Sheffield Citizens Advice requires you to complete the "languages" section too.

Next, click on the Profile Tab. Complete all the mandatory fields that are indicated with a red asterisk (ethnicity, disability, gender).

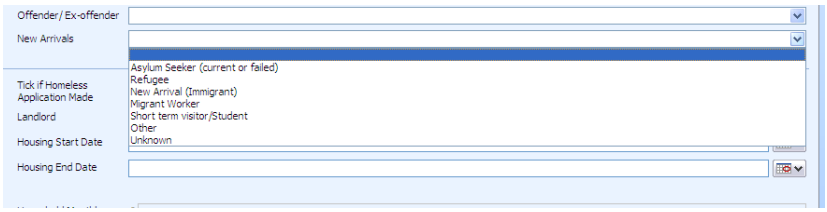
Sheffield Citizens Advice also needs all advice staff to complete the following fields:

Where disability/health problems has been entered- another field "Type disability/condition" becomes mandatory too.

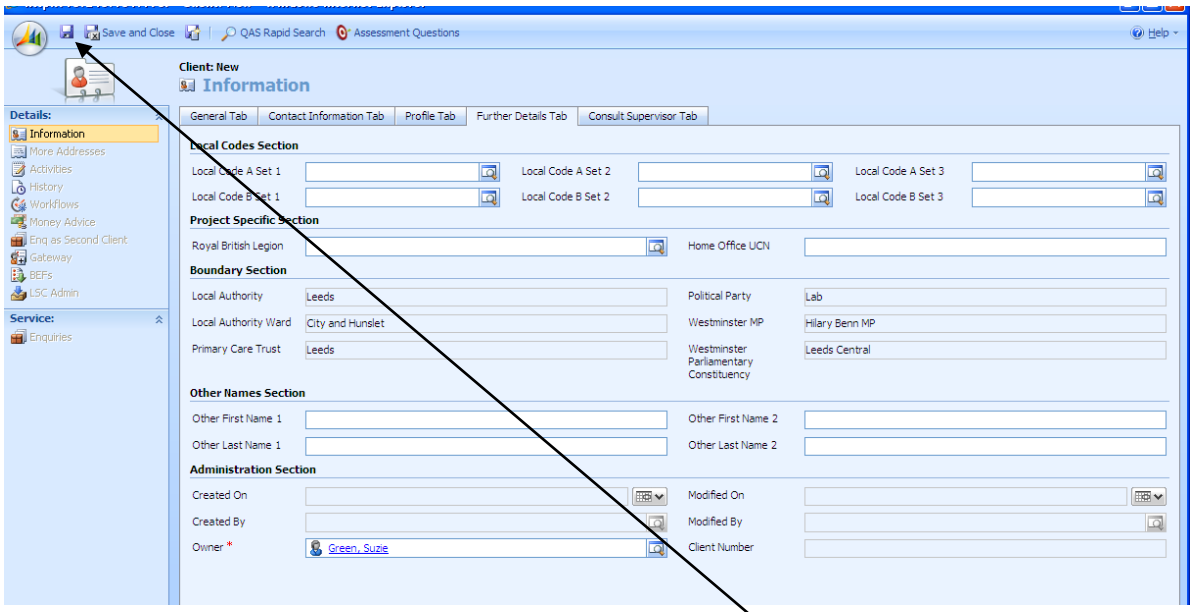


To enter Nationality where this has been gathered as part of the advice process, click the search option. "UK-British" appears at the top of the list.

Also add "New arrivals status" where this gathered.

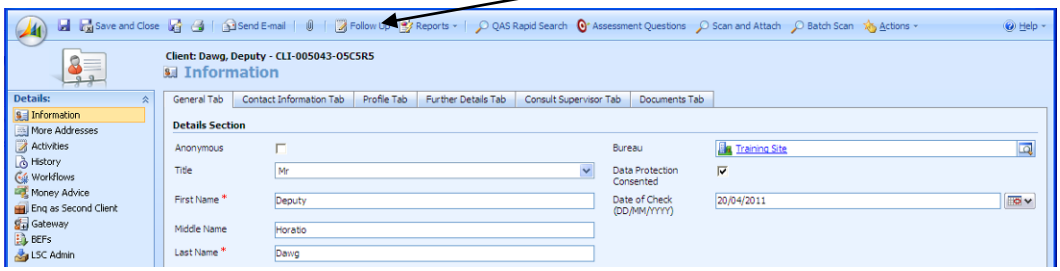


Next, if you click the Further Details Tab, you will see the boundary information has automatically been added. This will only be added if you use the QAS Rapid Search function as covered earlier.



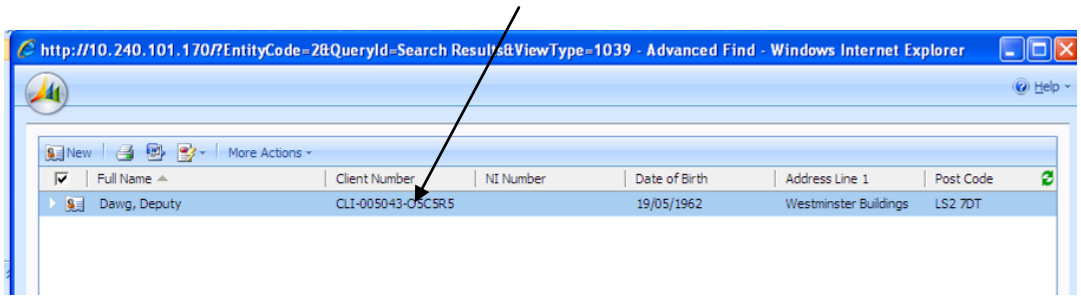
Now that you have completed your client record click Save by clicking the small disk icon to the top left.

Your screen will now show the client screen saved complete with reference number.



Section 5 - Adding a Gateway Assessment & discrete initial advice

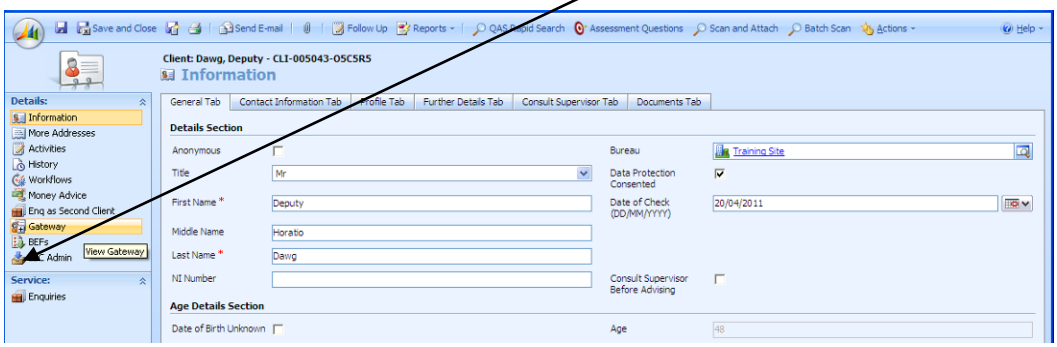
Either create a new client (covered previously) or find your client using the Advanced Find, then double click the record to select.



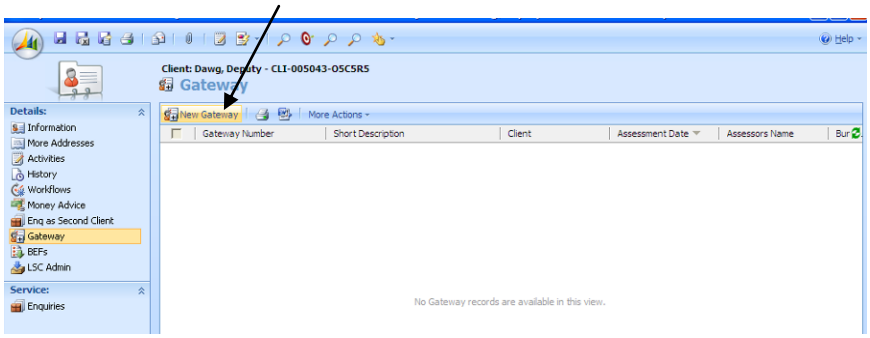
Your client record will open in a new screen.

ALWAYS MAKE SURE THE RELEVANT CLIENT RECORD IS OPENED WHEN YOU CREATE AND NEW GATEWAY

Click the Gateway option on the left hand side.



A new window will open. If this were an existing client, there may be other gateways saved against the client record, but as this is a brand new client the window will be empty. Select the New Gateway button.

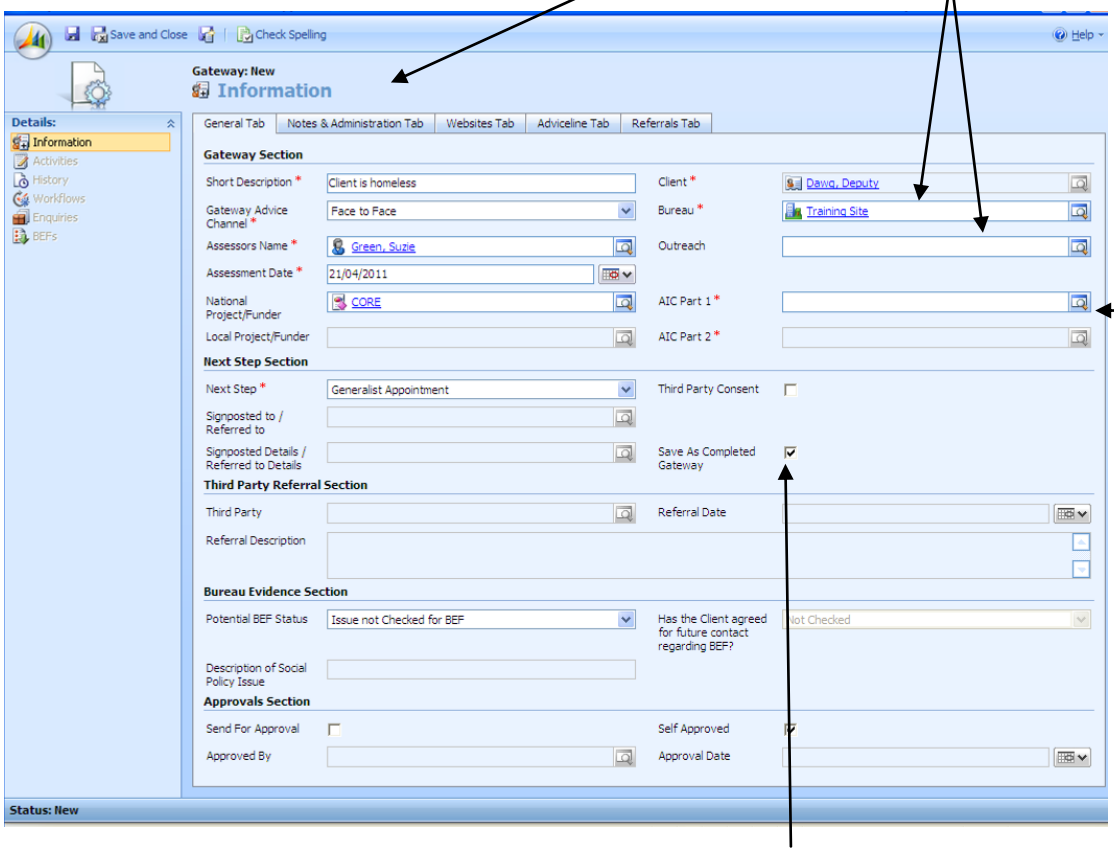


A new Gateway tab will open, and you can now complete the screens with all the relevant information. Mandatory fields have the red asterisk next to them.

SHEFFIELD CITIZENS ADVICE WANTS ALL ADVICE STAFF TO COMPLETE THE FOLLOWING MANDATORY FIELDS

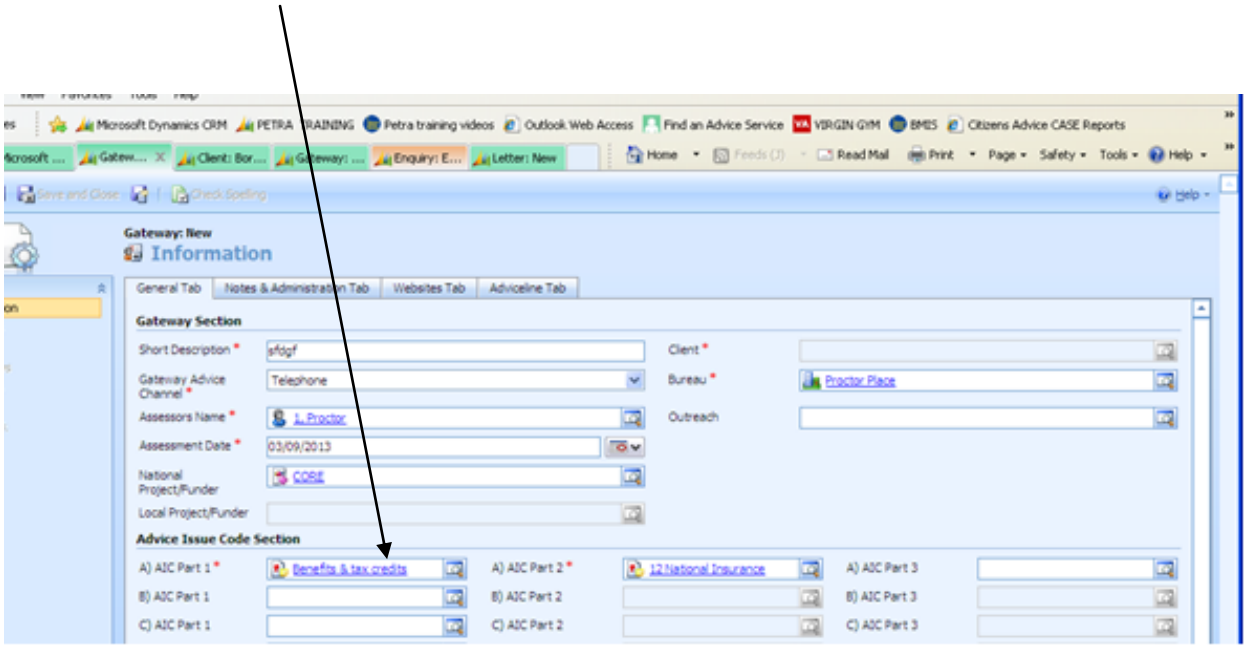
TBC2

If you are working from a different bureau site or outreach for this gateway assessment or enquiry you will need to change these fields too.



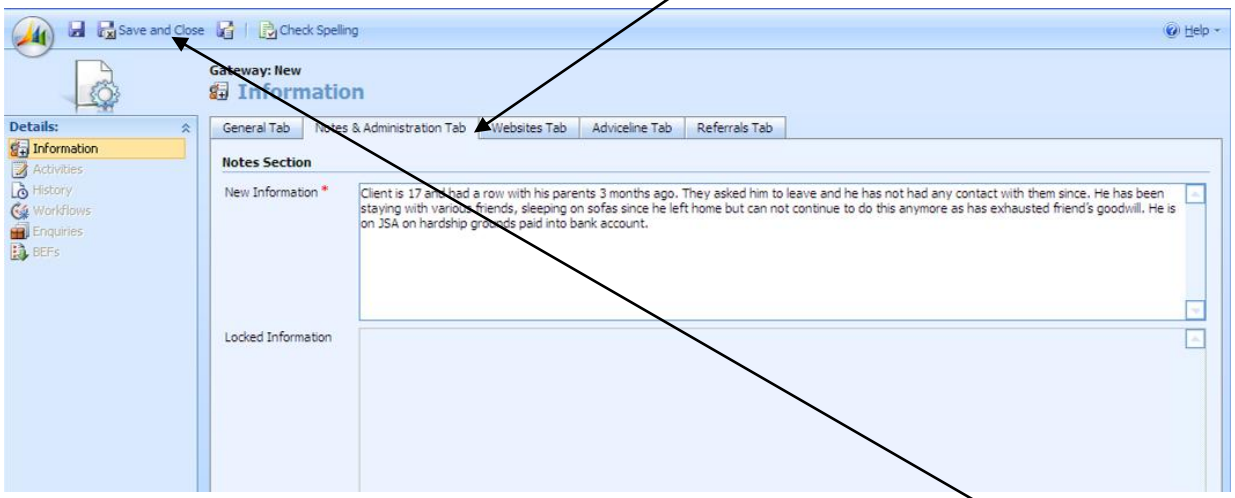
If you want to save this gateway as completed leave this box ticked otherwise you can untick it to save the gateway as a draft. . Please note that the text is locked down as soon as you save and you cannot amend it (only add a further note). If you need to save a draft then "untick" the field that says "save as a completed gateway". Note that this will be automatically ticked again next time you open the record.)

You now have to add the Advice Issue Codes, so select the AIC Part 1 Find option and select the code from the list that will appear, and click OK.



Next select the AIC Part 2 Find option and select the Part 2 code from the list, (and the Part 3 code if you have sufficient level of detail) and click OK. You can add up to 4 Advice Issue Codes onto the Gateway if several issues have been covered.

After completing the General Tab, select the Notes & Administration Tab.



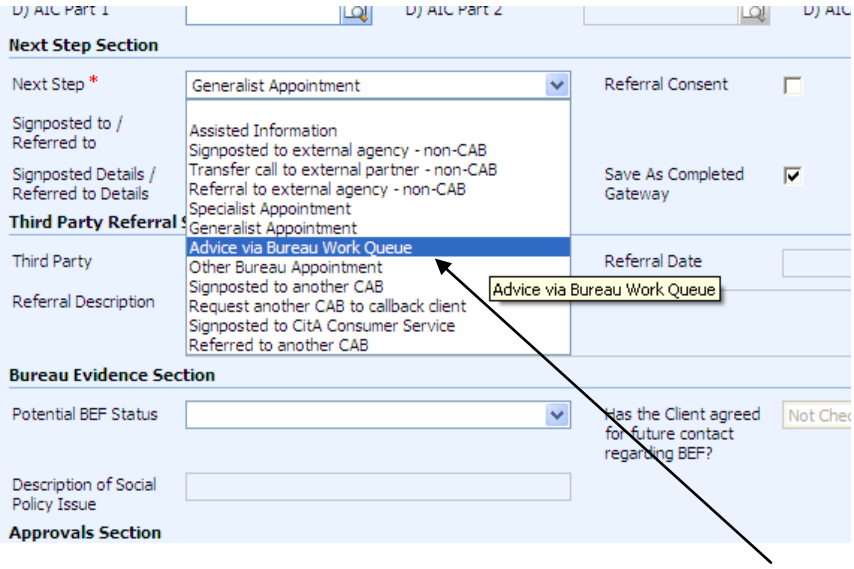
After you have completed the notes, save the gateway by clicking on the Save and Close button.

Save and close the client screen to return to the main screen.

There are 3 "save" buttons- from left-to right

"save", "save and close" + "save & new"- which is useful if you have more than one set of notes or other item to record straight away.

Next Steps : important note on recording!



1. **SHEFFIELD CITIZENS ADVICE NEEDS TO RECORD & REPORT WHETHER CLIENTS RECEIVE ANY DISCRETE ADVICE ON THE SAME DAY AS THE ASSESSMENT. WHEN CLIENTS GET SAME-DAY ADVICE PLEASE RECORD IT AS "ADVICE BY BUREAU WORK QUEUE"**

NB: DON'T FORGET THAT "REFERRED TO ANOTHER CAB" MEANS OUTSIDE OF ALL OF SHEFFIELD (NOT JUST OUTSIDE YOUR SITE)

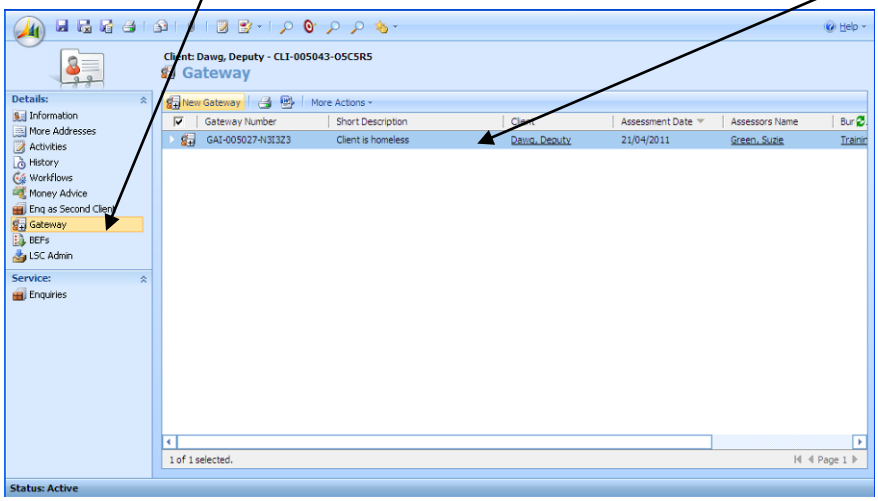
Section 6 - Adding an Enquiry

You need to be logged into Petra with adviser rights. Search for your client (covered previously) and double click to load their record.

Enquiries are used to record more detailed exploration and casenotes beyond the initial assessment or "gateway" i.e. when further tailored advice, or even casework is provided.

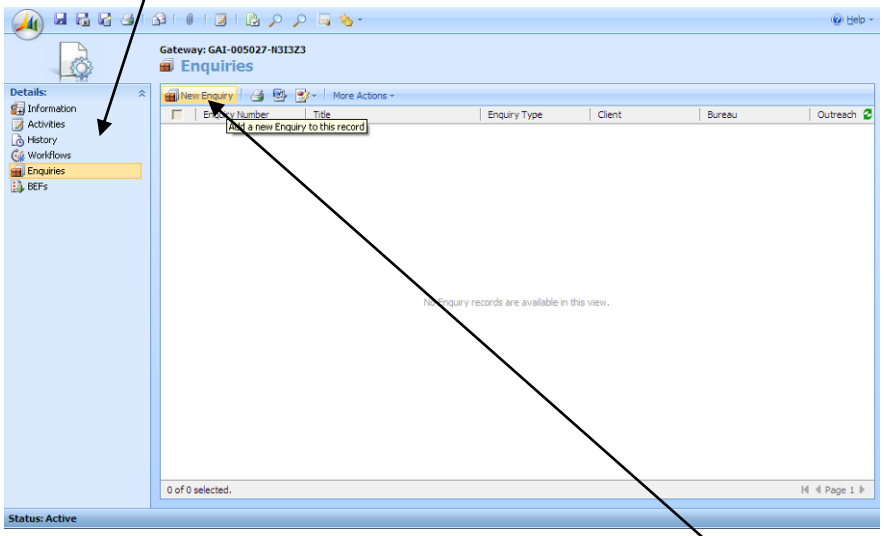
Sheffield Citizens Advice will develop a guidance template and some model examples so you know what level of detail is expected.

Select the Gateway option on the Navigation Pane and double click the Gateway to load it.



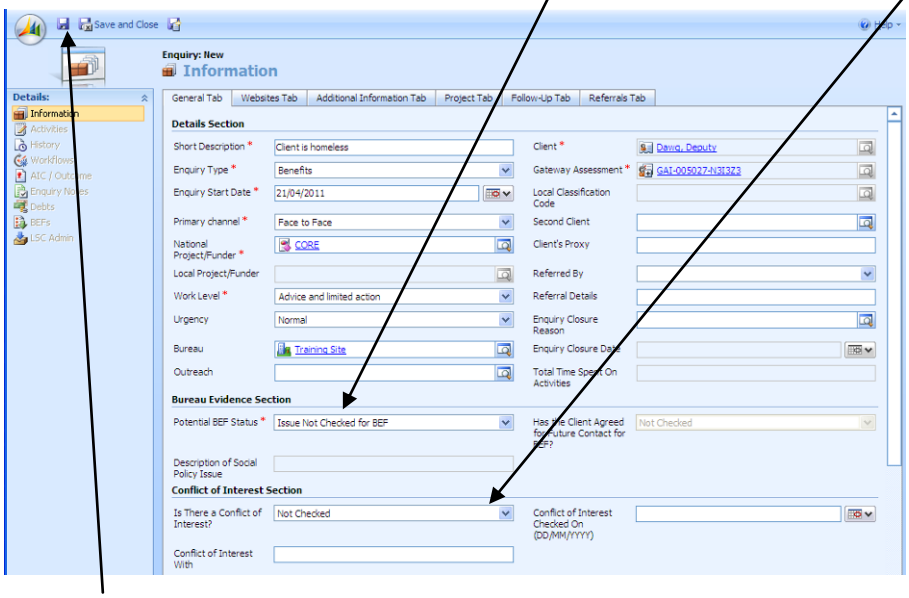
MAKE SURE THE CLIENT AND RELEVANT GATEWAY SCREENS ARE OPEN WHEN THE ENQUIRY IS CREATED.

Click the Enquiries option in the Navigation Pane and the Enquiry area of the Gateway will open.



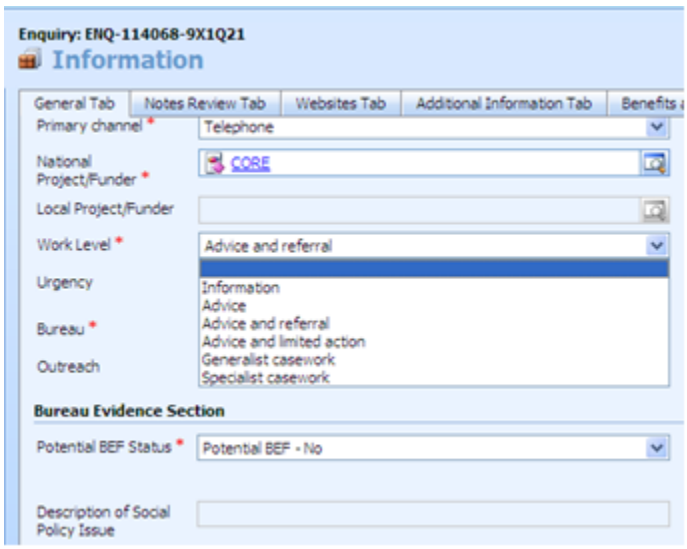
There are no enquiries for this Gateway, so click New Enquiry.

The Enquiry opens, with many of the fields completed from the Gateway. Fill in all the remaining fields necessary, including the Potential BEF Status and the Conflict of Interest.



Now Save the enquiry by clicking on the Save button

Work Level Field- record highest relevant level



Information= no tailored advice given- self-help/leaflets only (this will be rare at the enquiry stage as should be screened out at Gateway Assessment)

Advice = (inc assisted information and/or some discrete advice and/or self help materials)

Advice & referral (as above + referral or signposting)

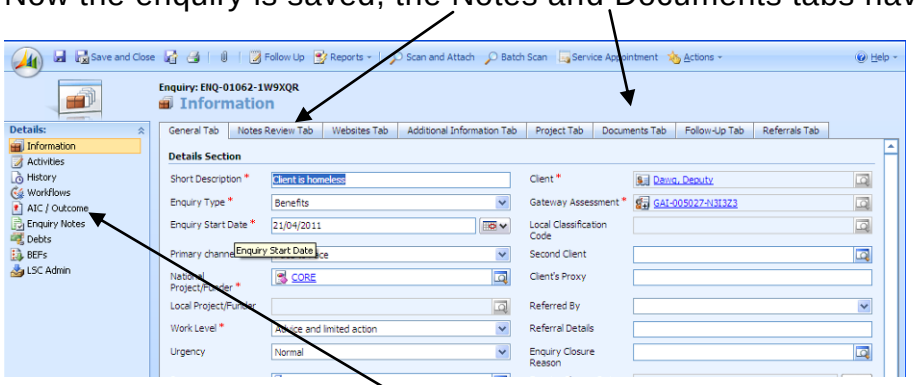
Advice & limited action (one-off advice or series of one-off pieces to support client)

Generalist casework-e.g. generalist debt and welfare benefits casework.

Specialist casework- (only refer to specifically skilled advisers- e.g. immigration, housing, DRO intermediary etc)

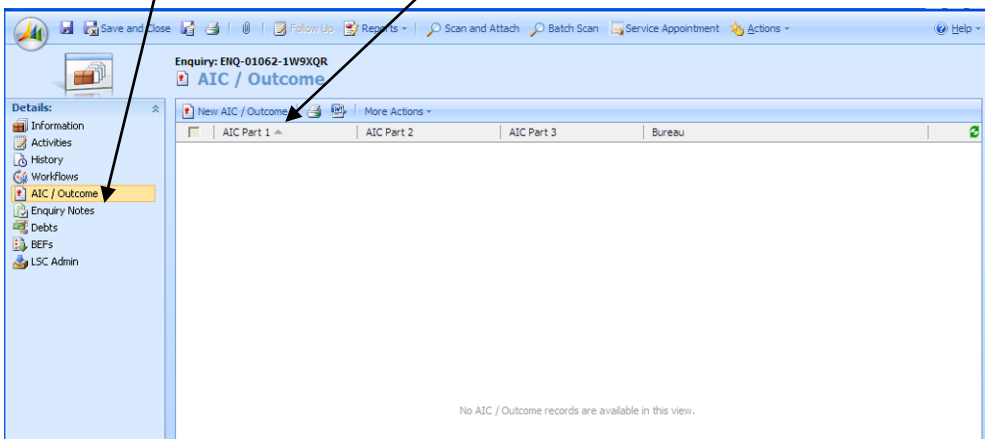
(Casework = bureau takes responsibility for running the case)

Now the enquiry is saved, the Notes and Documents tabs have appeared.

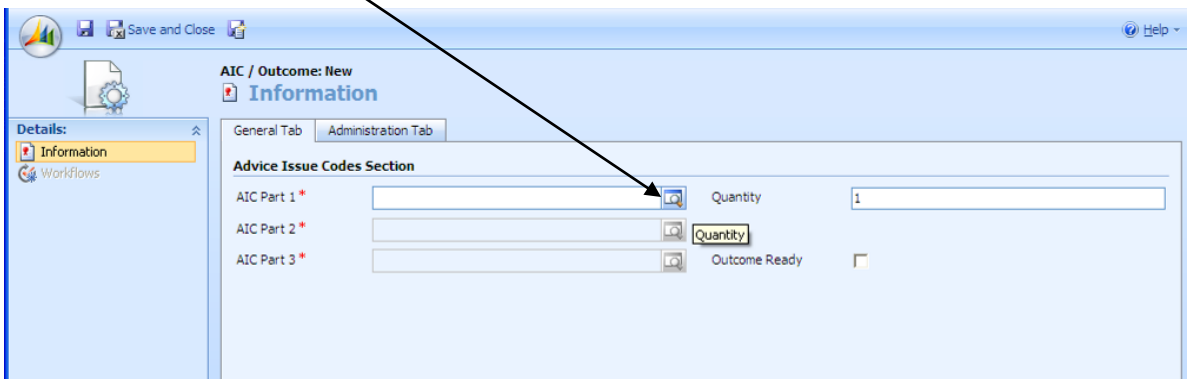


You now need to add the AIC's (Advice Issue Codes).

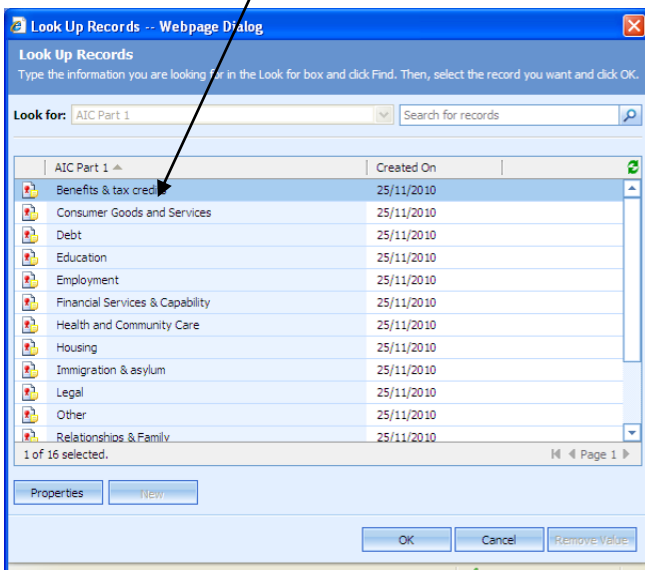
Select AIC/Outcome,then New AIC/Outcome.



Click on the AIC Part 1 Find option



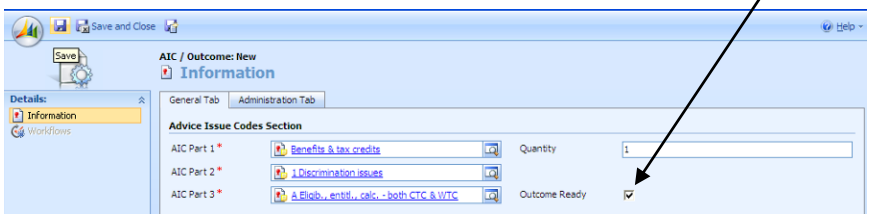
Select the Part 1 code from the list then click OK.



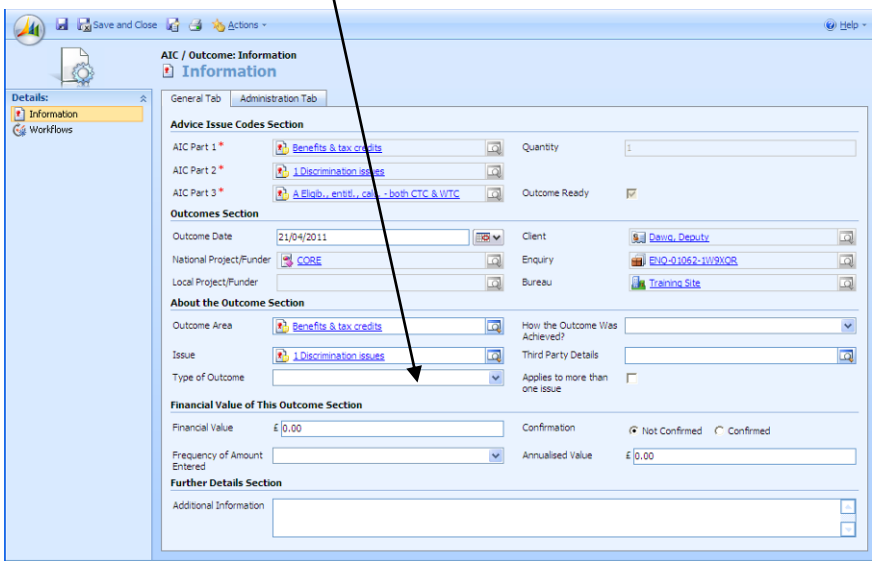
Repeat this step for all 3 parts. If you have multiple codes to add, use the Save and New option. You will find that Part 1 and 2 are already populated but this can be overwritten if necessary. When you have finished, if there is no outcome related to the last code, select Save and Close.

RECORDING OUTCOMES- IMPORTANT!

As part of your routine case recording you should always consider if an "outcome" can be recorded against the issue you have advised on. Often this will not be known immediately so you need to consider if this issue is "outcome ready". If there **IS** an outcome related to this code, then tick the Outcome Ready box then click Save.

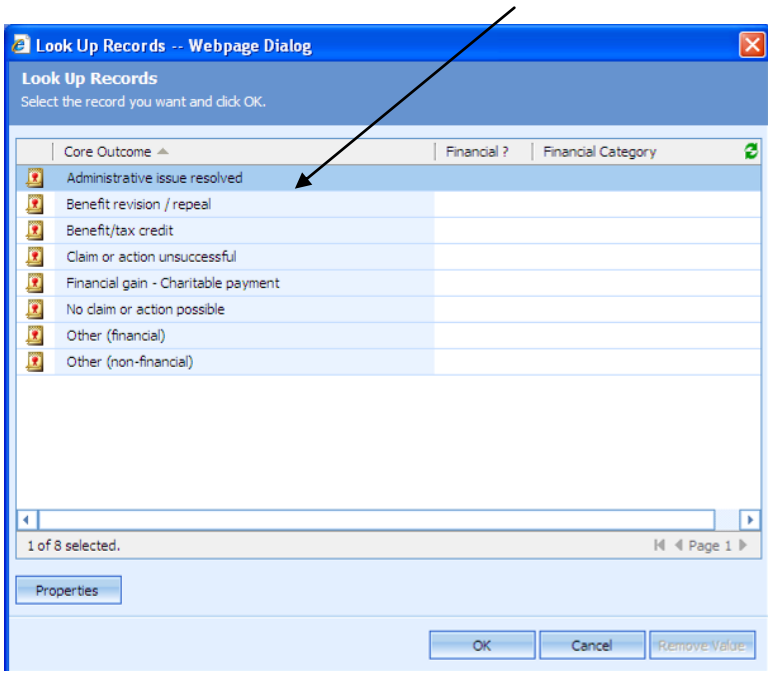


You now have the option to add the outcome details. Select the dropdown list for type of outcome and select Core.

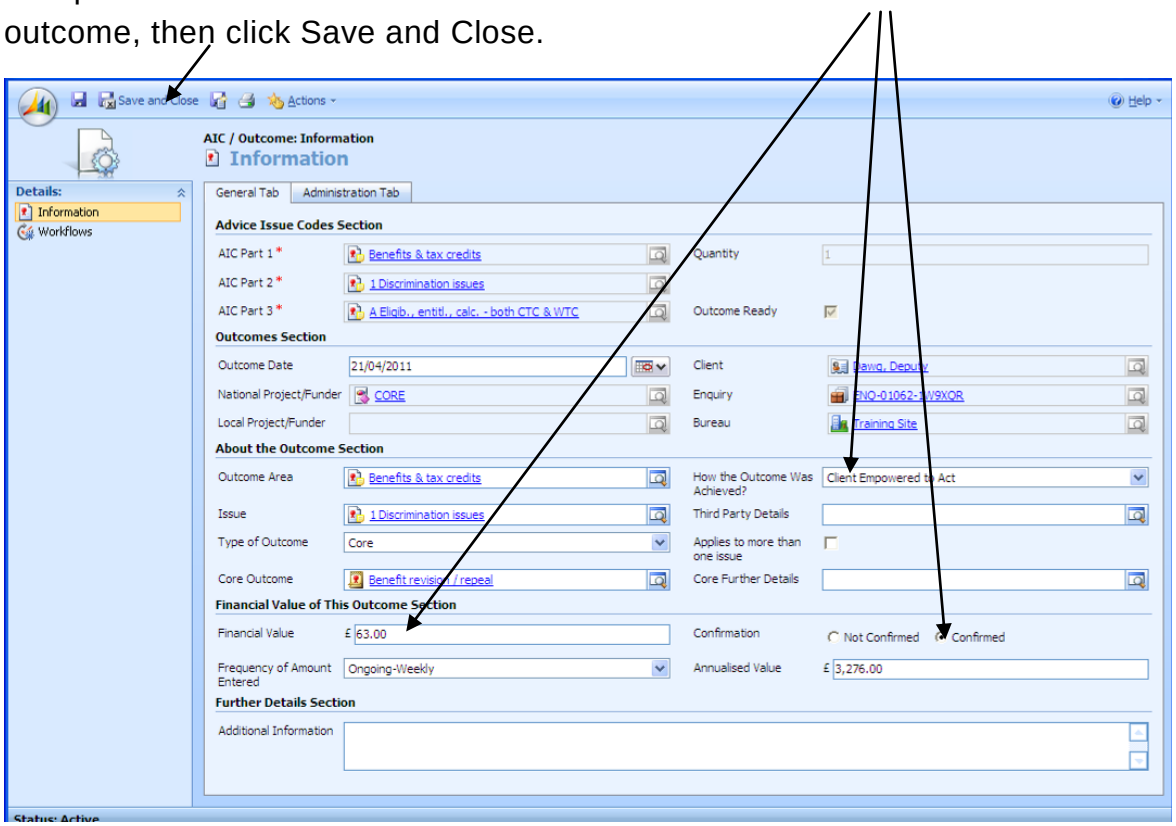


There are over 200 outcomes set out for each area of advice. It is particularly important to record as much as you can on the key topics such as benefits (including quantifiable financial gains), debt, finance (includes improved budgeting) and housing. It can include outcomes where the client has been empowered to act on their own behalf and can cope better.

A new field will appear under Type of Outcome for Core Outcome. Select the Find option for this field and select the outcome type from the list, then click OK.

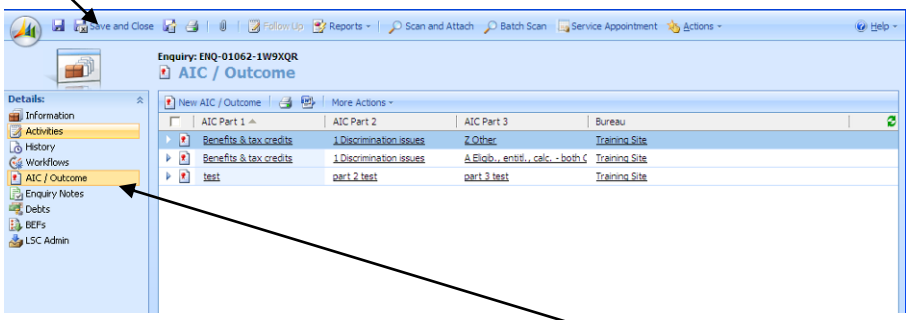


Complete all the other outcome fields to reflect whether this is a financial outcome, then click Save and Close.



You will now be back at the AIC/Outcomes screen.

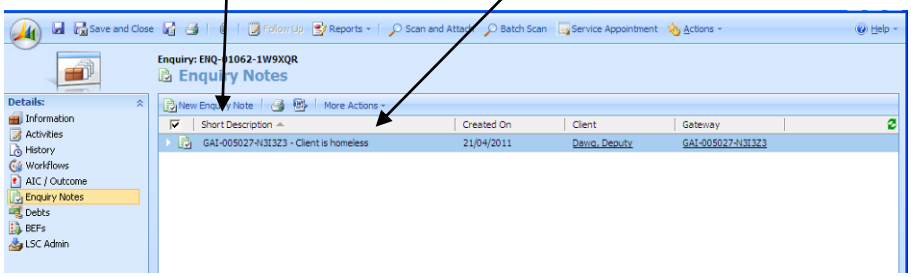
Click Save and Close.



To add the notes for today's interview select Enquiry Notes from the Navigation Pane.

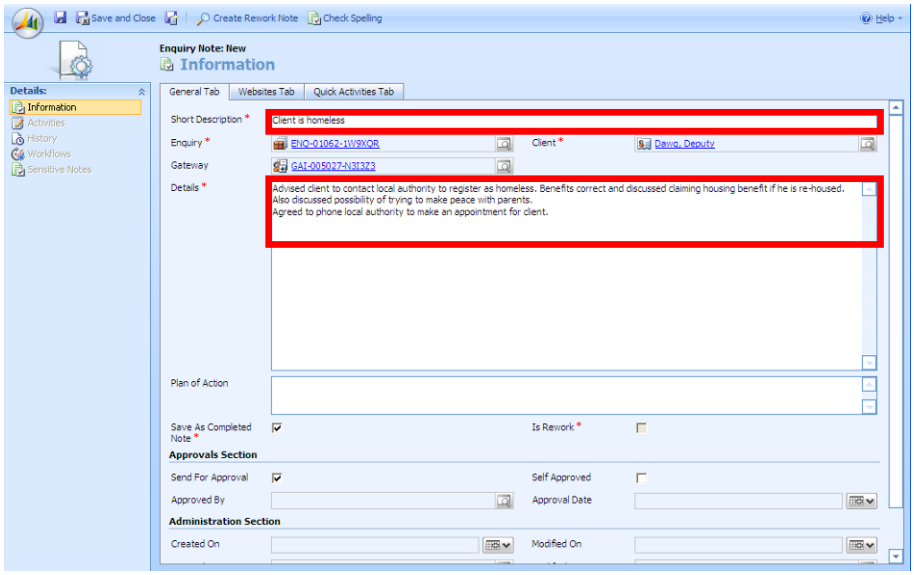
A new window containing the previous Gateway note will open.

Select New Enquiry Note.



Adding casenotes

Complete the General tab of the Enquiry Note. You can change the short description to reflect this new information if you want to, then fill in the details. Your note will be sent for checking dependent upon your adviser status, and the checking percentage assigned ie: 1 in 4, so you don't need to change any of the default settings.

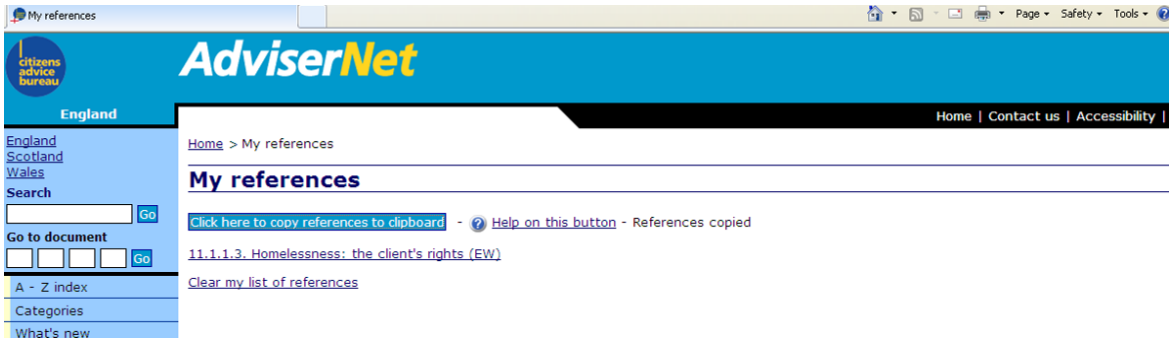


Adding Advisernet references from the website tab:

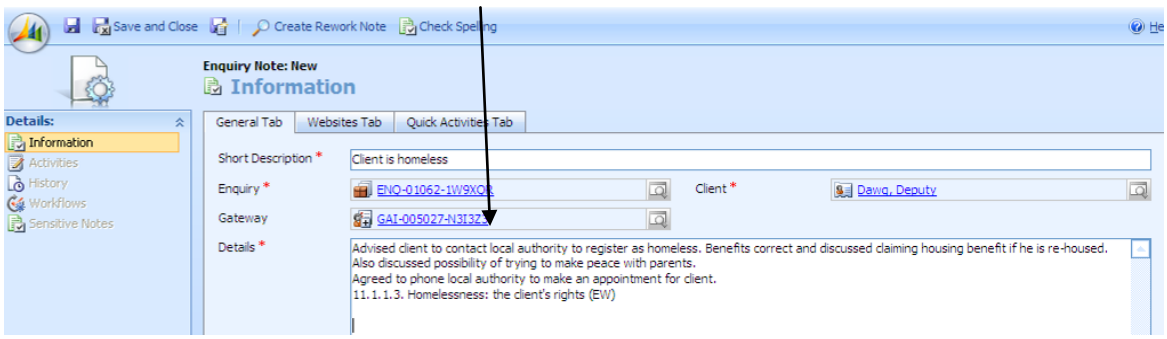
All advice write ups should include references for the key information sources- often this is Advisernet or could be CPAG, Disability Rights Handbook etc.

Shortcut for adding Advisernet references:

Click on the websites tab, select Advisernet from the dropdown and enter the reference number from your case study into the Search box. Once you found the item, select add to my references. Click on My references on the bottom left, then select the option to copy your references to clipboard.



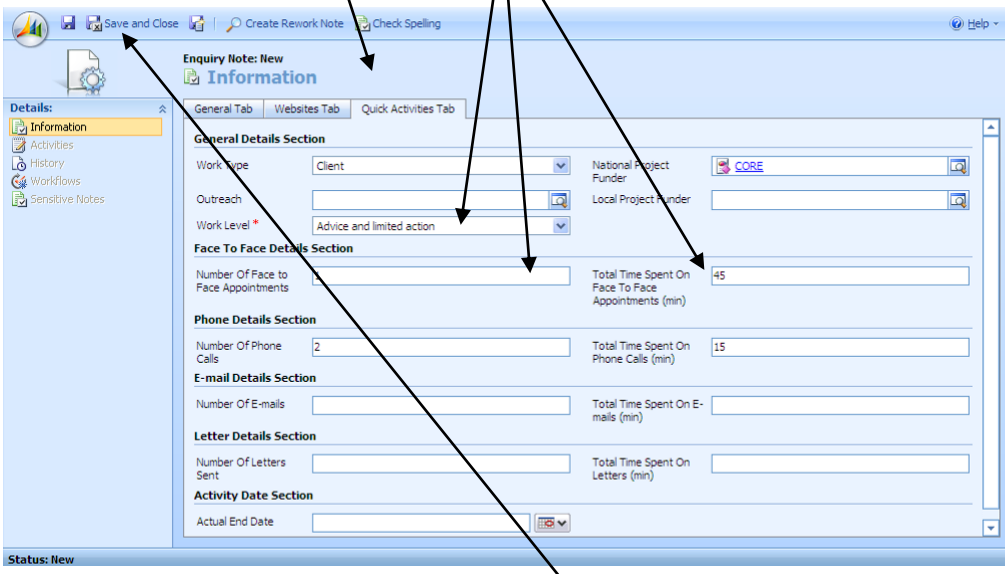
Click on the enquiry screen to bring it to the front, and right click to select Paste and the reference will appear in your notes section. DO NOT SAVE YET!!!!!



ALTERNATIVELY YOU CAN OPEN ADVISERNET IN A SEPARATE WINDOW AND CUT AND PASTE FROM THAT (PREFERRED BY MANY).

Adding Activities (prev."contacts")

Click on the Quick Activities Tab. Complete the relevant fields for the **CLIENT CONTACT ACTIVITIES**.



When you have filled in all the fields, click Save and Close.

SHEFFIELD CITIZENS ADVICE CURRENTLY HAS FEW FUNDERS THAT REQUIRE REPORTING ON THIRD PARTY CONTACTS. IF YOU ARE WITH A FUNDING STREAM THAT NEEDS THIS PLEASE SPEAK TO YOUR SUPERVISOR AND additional guidance will be provided on how to do that.

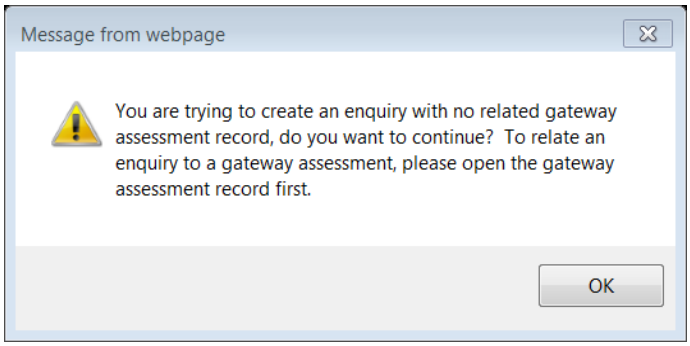
Section 8 - Creating a Task

Petra has a number of functions related to creating Tasks and reminders. Sheffield Citizens Advice will agree a protocol for how these may be used when there have been further discussions after the launch.

Section 9 - To create a new Enquiry record when no Gateway is present

. Please note that the text is locked down as soon as you save and you cannot amend it (only add a further note). If you need to save, but possibly amend later (after cup of tea for example), then "untick" the field that says "save as a completed gateway". Note that this will be automatically ticked again next time you open the record.)

Either find an existing client record and open by double clicking on it or create a new one.Click on Enquiries in the Navigation Pane and then NEW ENQUIRY. You will be warned that you are trying to add an Enquiry without a Gateway Record. Click OK.



You will need to enter a reason why no Gateway has been carried out e.g. outreach/bureau exemption/transferred from CASE/third party referral. This is on the Additional Information Tab.

Follow all previous instructions on adding Enquiry Notes/Recording AIC's/Outcomes.

Client returning with the same issue (Gateway – where an enquiry record exists)

1. Search for the client
2. Open the client's record
3. Click on Enquiries in the Navigation Pane and if an Enquiry Record exists open the Enquiry record
4. Create a new Enquiry Note
5. Click Save & Close

Client returning with the same issue (enquiry)

- Follow steps 1 – 3 as above.
- Click on Enquiries in the Navigation Pane and open the relevant enquiry record.
- Add any AIC's/Outcomes (as per instructions for new enquiry).
- Click on Enquiry Notes in the Navigation Pane.
- Click on New Enquiry Note.
- Complete the General Tab & Quick Activities Tab (as per instructions for new enquiry)
- Click Save & Close.

Section 10 - Creating a BEF

BEF STANDS FOR BUREAU EVIDENCE FORM. IT IS THE ELECTRONIC MECHANISM BY WHICH CASE STUDIES- HIGHLIGHTING POLICIES AND PRACTICES THAT NEED TO BE CHANGED ARE CREATED, CHECKED AND SENT (ANONYMOUSLY) TO CITIZENS ADVICE SOCIAL POLICY TEAM (IN CENTRAL OFFICE). IT GIVES MORE DETAIL THAN THEN STATS ALONE CAN PROVIDE AND IS ESSENTIAL TO ALL THE LOBBYING WORK THAT IS DONE NATIONALLY AS WELL AS BEING USEFUL LOCALLY.

From an enquiry record

1. Open up the Client screen and check that the Profile Tab is complete.
2. Open up the Enquiry record
3. Click on BEF's in the Navigation Pane.
4. Click on New BEF, this will open the BEF information screen.
5. Complete fields on the General Tab.
6. Complete details of the social policy issue on the Problems Tab.
7. Use the 'Got a Beef? Write an eBEF' guide for inspiration when completing all the fields.
8. Complete Bureau SP Actions Tab were applicable
9. Click Save
10. You can now click on AIC/Outcome option in the Navigation Pane.
11. Click on New AIC/Outcome button, this will open a new screen.
12. Complete the Advice Issue Codes (AIC's)
13. Click Save and Close when finished which will take you back to the AIC/Outcomes screen. Repeat steps above if there is more than one AIC to record.
14. Click Information in the Navigation Pane.
15. In the Status section click on the Check Required box. This will then send the record to the Social Policy Co-ordinator for checking.
16. Click Save and Close.

From a Gateway record

1. Open the Client screen and check that the Profile Tab is complete.
2. Open up the Gateway record.

Follow steps 3 – 15 above.

ATTACHING A FILE

Use this to attach letters, scanned forms, benefit checks etc to the client's record electronically where you have the facilities to do this.

The same process is used whether attaching to a Gateway, Enquiry or BEF record.

1. Open up the relevant record.
2. Click on Actions at the top of the screen, then Add Activity, then click Letter (*it's called Letter regardless of the type of document).* A new screen will open.
3. Complete the Work Type and Subject fields.
4. Click Save.
5. Click the attachments symbol  at the top of the screen.
6. Click Browse
7. Navigate to the relevant document.
8. Click Attach
9. Click Close to close message box.
10. Click Save as completed
11. The attachment will now show in the History.

Section 11 - Creating a saved view

This is normally an administrative function. Sheffield Citizens Advice will introduce a procedure for creating, saving and sharing views after the launch.

Section 12 - Checking for conflict of interest & recording of specific sensitive information

The central pool of Petra data makes it possible for two different Bureau acting on behalf of two Clients to view the enquiry notes and read what advice has been given to the other party.

If a conflict of interest has been identified it will be possible to create a sensitive note that can only be ready by default by the Adviser recording it.

That Adviser can then share that sensitive note record with other colleagues in their Bureau as needed.

Sheffield Citizens Advice Mental Heath Unit has established a procedure for the use of sensitive notes for certain categories of clients- please check if you are working within this unit.

Otherwise, within Sheffield Citizens Advice only supervisors will be able to authorise the creation of a sensitive note. Do NOT create them unless you have checked with your supervisor.

Managing sensitive records

If at the Enquiry stage a Conflict of Interest has been identified or a Client's issues are of a particularly sensitive nature it will be possible to record sensitive notes separately. Any sensitive notes that are created will by default only be visible to the user creating them. That user can decide to share a sensitive note with other colleagues if required.

Creating a sensitive note

1. Create a new Enquiry Note or Open and existing Enquiry Note
2. Click Sensitive Notes from the Navigation Pane

3. Click the New Sensitive Note button
4. You must enter a Short Description
5. Enter your sensitive text in the Description text box.
6. The related Enquiry Note is pre-populated and cannot be changed.

Sharing a sensitive note

1. Open your Sensitive Note
2. Click Actions from the Standard Toolbar
3. Click Sharing – (a dialogue box will then appear)
4. Click Add User/Team in the Common Tasks column (a second dialogue box will appear)
5. The Look For field will default to User
6. Enter the user name(s) you want to share the sensitive note with in the adjacent field or click Lookup to obtain a list of users.
7. Select the correct user(s) name from the Available records box
8. Click the arrow >> button to select the user
9. Click the OK button (the first dialogue box will now reappear)
10. Against your user(s) select what level of access you want them to have. For example if you select Read they will be able to review the sensitive note but not make any changes. If you select Read and Write they will be able to review and make changes to the sensitive note.

Section 13 - Activities in Petra – Activity types

Petra includes a powerful range of methods to record different types of activities within it including advice activities such as face-to-face interviews or phone cals and follow-up activities or future tasks.

FOR FUNDING PURPOSES WITHIN SHEFFIELD THE MOST IMPORTANT ACTIVITIES TO RECORD ARE THOSE INVOLVING DIRECT WORK WITH CLIENTS (FORMERLY KNOWN AS CLIENT CONTACTS).

WITHIN PETRA THESE CLIENT CONTACT ACTIVITIES ARE MOST EASILY RECORDED IN THE FUNCTION "QUICK ACTIVITIES".

(A few funders are also interested in 3rd party contacts. If this applies to your project please talk to your supervisor about how these are recorded and added to your records).

CLIENT-BASED EXAMPLES INCLUDE:

Phone Calls. You can record phone calls you make on behalf of a Client as part of the Enquiry process as a Quick Activity

Face to Face meetings (F2F). You can record a F2F meeting as a result of a Client interview (whether it is the result of a Service Appointment or a Drop In) at a Bureau or when a Client meets and provides the Adviser in Bureau

Letter You can also record the fact that you prepared letters for a Client as part of their Enquiry interview as a Quick Activity **if you do not need to attach documents**. (But documents cannot be attached to activities created via the Quick method -you need to follow the instructions under "Attaching a file").

Email. You can record the fact you sent emails for example as part of the Clients Enquiry as a Quick Activity. You should use the Email activity type on the Quick Activity Tab in combination with the Worktype Casework Preparation/Email

NON-CLIENT activities or "tasks"

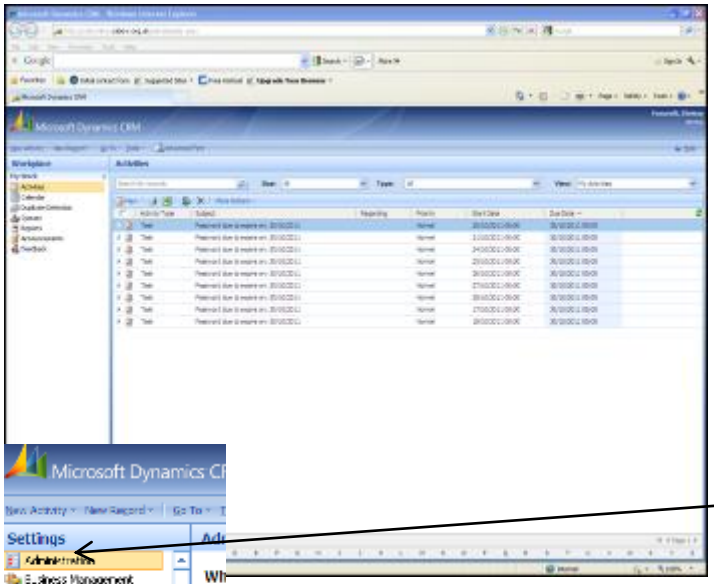
- **Task**. Task activity types are used in several Petra Processes including:
- Password change task: reminder that you are due to change your password.
  - Supervisor Checking where the Supervisor creates a Task for the Gateway Assessment or Enquiry originator to rework.
  - Social Policy where the SP Co-ordinator creates a Task for the BEF to be modified or improved by the originator. You can also create Tasks to remind you to do something on a future date, for example to remind you to phone a 3rd party next week.

SHEFFIELD CITIZENS ADVICE WILL AGREE A PROTOCOL FOR THE USE OF WORKPLACE TASKS AFTER LAUNCH

Section 14 - Changing your password- (on the live site your password expires after 60 days)

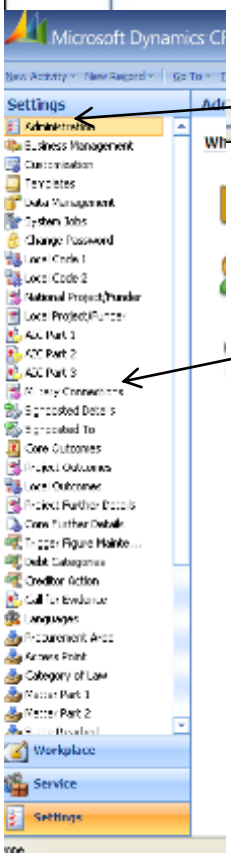
When you log into Petra, it will open up in your Workspace

This is the area where all pending tasks and open activities will appear. These need to be dealt with.



This is the area where all pending tasks and open activities will appear. These need to be dealt with.

If you receive a task asking you to change your password, do this in the following way:



Click on Settings

In the Navigation pane in settings, click on Change Password

The following screen appears and from here you need to log into the Citizens Advice Portal so put in your current password and click OK

The following screen appears

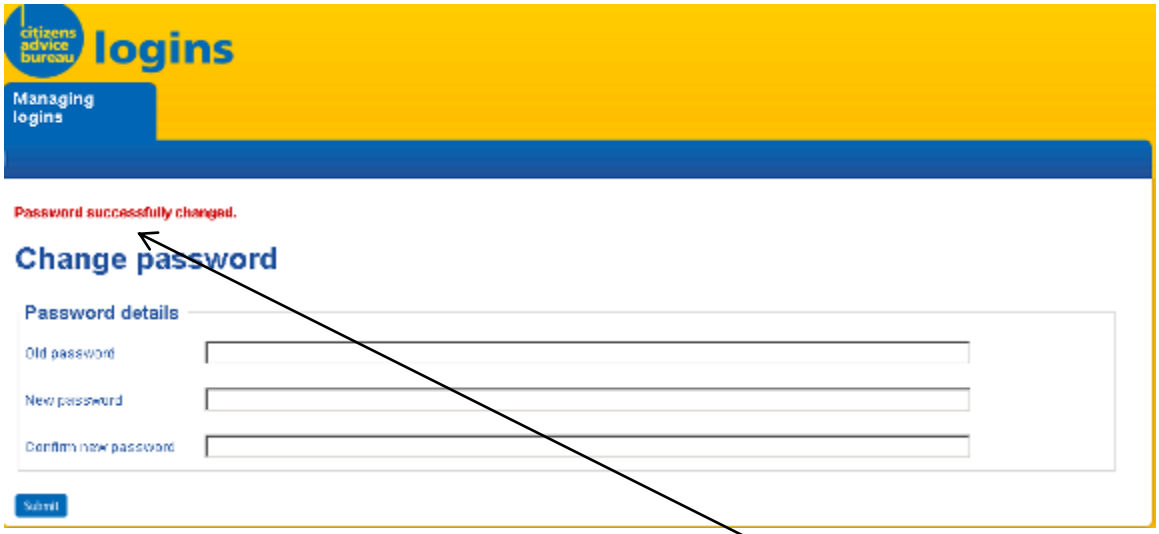
Type in your current password in the field marked old password

Then type in your new password and confirm your new password

The new password should be made up of eight characters using three of the following:

Upper Case – Lower Case – Number – Special Character as in the # or & or $ etc.

Then click Submit, and the following screen appears



This message tells you that your password has been changed

You now need to close this screen to return to Petra. Click on the cross in the corner to close it