



## 19 An overview of the personal details folder

The Personal details folder contains details about an individual, including:

- Any support team members.
- Buyer catalogues.
- Delivery addresses.
- System settings.

Your ability to view each tab within this folder will be dependent on your current business view, your relationship to the individual and whether or not their support team has any delegated permissions within Budget Manager.

**Personal details tab** – the personal details tab contains detailed information about the individual such as their name, address and contact details. Here, there is also the facility to upload their photograph.

shop 4 support

Hello, Ian Price, you are acting as Basil Fawley | End act as | Log off

Home | Help

You are here: Individuals / Bob Smith / Edit

Bob Smith

View map | Print | Save & Close | X

Personal Details | Further personal details | Additional information | Support team | Catalogue | Settings | Delivery addresses | Tracking

Title: Mr

Forename: Bob

Other names: Bobby

Surname: Smith

Preferred name: Bob1789

Flat name:

House name:

House number:

Postcode:

Street:

Town:

County:

Find address | Add address

	Action	Contact type	Contact details
<input type="radio"/>	X	Home telephone	8 5656 56 56 56
<input checked="" type="radio"/>	X	Email	user@user.com
<input type="radio"/>	X	Mobile	8 0989 989 89 8989
<input type="radio"/>	X	Home telephone	

Add line

**Further personal details tab** – this tab, shown below, contains further details regarding the individual, such as their date of birth, age and the number of hours they are supported. Specific references can also be added in this area, such as membership numbers or individual reference numbers.

The Show Sensitive Information button hides sensitive information such as the individual’s ethnic group, marital status, gender and disability. This information is normally hidden unless it is specifically requested that this information be viewable. This also indicates whether or not the individual is on the At Risk register.

shop 4 support

Hello, Ian Price, you are acting as Basil Fawley | End act as | Log off

Home | Help

You are here: Individuals / Bob Smith / Edit

Bob Smith

View map | Print | Save & Close

Personal Details | **Further personal details** | Additional information | Support team | Catalogue | Settings | Delivery addresses | Tracking

Date of Birth: 21/01/1981

Age: 21

Show sensitive information

Action	Reference type	Reference details
<input type="radio"/> X	NINO	AA 12 12 12 AA
<input checked="" type="radio"/> X	Sage Reference	12345678
<input type="radio"/> X	SWIFT Number	12345678
<input type="radio"/> X	S4S Reference	ABCD ABCDE

Add line

Date of Birth: 21/01/1981

Age: 21

Ethnic group: [dropdown]

Marital status: [dropdown]

Gender: [dropdown]

Disability: [dropdown]

















On 'At risk' register


Action	Reference type	Reference details
<input type="radio"/> X	NINO	AA 12 12 12 AA
<input checked="" type="radio"/> X	Sage Reference	12345678
<input type="radio"/> X	SWIFT Number	12345678
<input type="radio"/> X	S4S Reference	ABCD ABCDE


Add line

**Support team tab** – here, you can view or add people to the support team of the individual.

The screenshot shows the 'shop 4 support' web application. The user is logged in as Basil Fawley. The breadcrumb trail is 'You are here: Individuals / Bob Smith / Edit'. The left navigation menu is expanded to 'Individuals'. The main content area shows the 'Support team' tab for Bob Smith. A table lists the support team members:

Action	Name	Relationship	Organisation	System role	Attribute icons
   	Stephen Perrin	Son	Wigan Council	Support team	
   	Lynn Perrin	Wife	Wigan Council	Support team	
   	Mary Cary	Care manager	Wigan Council	Personal Budget manager	
   	Amy Smith	Sister	Wigan Council	Support team	

Support team members can be added by selecting the 'Add'  action button.

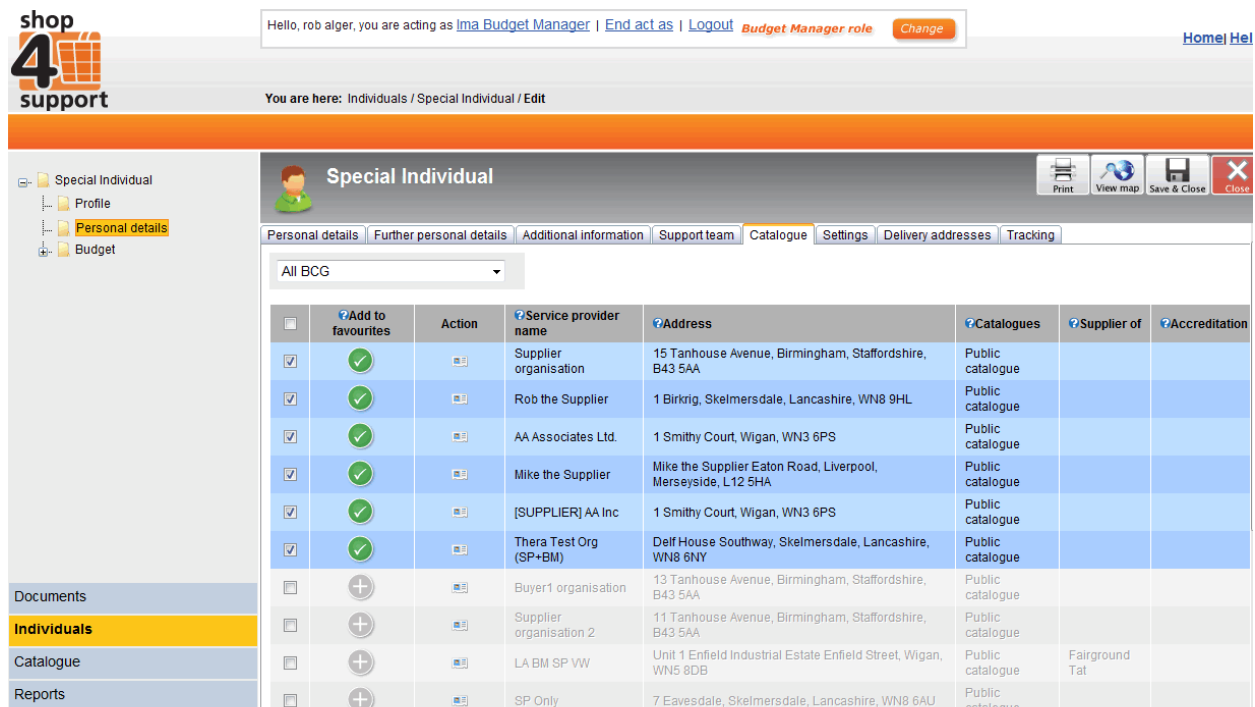
Clicking on the business card icon  in the action column allows the support team member's details to be displayed.

**Within this area, the following details are recorded:**

- Name:** The forename and surname of the support team member.
- Relationship:** The relationship between the support team member and the individual. If the support team member is also the individual's Personal Budget Manager this will be shown here.
- Organisation:** If the support team member belongs to an organisation it will be shown here.
- System role:** The current role of the support team member.
- Attribute icons:** This is a visual representation of the most significant role undertaken by the support team member i.e. doctor, teacher, guardian, parent, etc.

**Catalogue tab** - in this area you can find information regarding the current suppliers and service providers related to an individual. You can use the drop down menu to display service providers based on the catalogue type, such as Private, Public or Local Authority.

Suppliers can also be added or removed and a list of favorites compiled. This means that when you come to use a catalogue, you can filter it by Show Favourites, to see only the products provided by those 'favourite' service providers.



The screenshot shows the 'shop 4 support' interface. The user is logged in as 'lma Budget Manager'. The page title is 'Special Individual'. The 'Catalogue' tab is selected, showing a list of service providers. The table below is a representation of the data shown in the screenshot.

<input type="checkbox"/>	<input type="checkbox"/> Add to favourites	Action	<input type="checkbox"/> Service provider name	<input type="checkbox"/> Address	<input type="checkbox"/> Catalogues	<input type="checkbox"/> Supplier of	<input type="checkbox"/> Accreditation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Supplier organisation	15 Tanhouse Avenue, Birmingham, Staffordshire, B43 5AA	Public catalogue		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Rob the Supplier	1 Birkrig, Skelmersdale, Lancashire, WN8 9HL	Public catalogue		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AA Associates Ltd.	1 Smithy Court, Wigan, WN3 6PS	Public catalogue		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Mike the Supplier	Mike the Supplier Eaton Road, Liverpool, Merseyside, L12 5HA	Public catalogue		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		[SUPPLIER] AA Inc	1 Smithy Court, Wigan, WN3 6PS	Public catalogue		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Thera Test Org (SP+BM)	Delf House Southway, Skelmersdale, Lancashire, WN8 6NY	Public catalogue		
<input type="checkbox"/>	<input type="checkbox"/>		Buyer1 organisation	13 Tanhouse Avenue, Birmingham, Staffordshire, B43 5AA	Public catalogue		
<input type="checkbox"/>	<input type="checkbox"/>		Supplier organisation 2	11 Tanhouse Avenue, Birmingham, Staffordshire, B43 5AA	Public catalogue		
<input type="checkbox"/>	<input type="checkbox"/>		LA BM SP VW	Unit 1 Enfield Industrial Estate Enfield Street, Wigan, WN5 8DB	Public catalogue	Fairground Tat	
<input type="checkbox"/>	<input type="checkbox"/>		SP Only	7 Eavesdale, Skelmersdale, Lancashire, WN8 6AU	Public catalogue		

Fig. 4 Catalogue

Business cards can also be created for service providers, enabling you to see any contact details at the press of a button, as shown below.



The screenshot shows a 'Service Provider' window for 'Embrace'. The window displays the following contact information:


- Service Providers business park**  
Deepdale, Preston. PR3 8BB
- 44 0 1772 654321
- email: paul.support@wellSupported.co.uk
- website: www.embrace.co.uk

Please email us any your questions or proposals

**Settings tab** - in this area (shown below) you can view any automated settings that have been set up for an individual, such as the automatic confirmation of delivery notes on orders placed by the individual.

The screenshot displays the 'shop 4 support' web interface. At the top left is the logo. The top navigation bar shows the user's name 'Hello, Ian Price, you are acting as Basil Fawly' and links for 'End act as' and 'Log off'. On the right are 'Home' and 'Help' links. Below this is a breadcrumb trail: 'You are here: Individuals / Bob Smith / Edit'. A left-hand navigation menu lists categories like 'Documents', 'Individuals' (highlighted), 'Catalogue', 'Reports', and 'Administration'. The main content area is titled 'Bob Smith' and features a sub-menu with tabs: 'Personal Details', 'Further personal details', 'Additional information', 'Support team', 'Catalogue', 'Settings' (active), 'Delivery addresses', and 'Tracking'. The 'Settings' tab is open, showing an 'Approval procedure' section with a dropdown menu for 'Procedure name' and a checked checkbox for 'Auto confirm delivery notes'. At the bottom right, there are links for 'Terms of use' and 'Powered by Valueworks'.


**Delivery addresses tab (shown below)** - here, you can find any delivery addresses used previously for an individual's orders. You can also add or delete existing delivery addresses from this area.



Hello, Ian Price, you are acting as Basil Fawley | [End act as](#) | [Log off](#)

[Home](#) | [Help](#)

**You are here:** Individuals / Bob Smith / Edit



**Flat name:**

**House name:**

**House number:**

**Postcode:**

**Street:**

**Town:**

**County:**

**Address line:** 1 Tanhouse Avenue

**Town:** Birmingham

**County:** Staffordshire

Please select your address from the list below:

Action	Flat name	House name	House number	Street	Town	County	Postcode
↗			1	Tanhouse Avenue	Birmingham	Staffordshire	B43 5AA
↗	Flat 1	Edgar Court	28	Tanhouse Avenue	Birmingham	Staffordshire	B43 5AG
↗			1	Broome Avenue	Birmingham	Staffordshire	B43 5AL
↗			1	Greenfield Road	Birmingham	Staffordshire	B43 5AR
↗			1	Tregea Rise	Birmingham	Staffordshire	B43 5AT
↗			1	Highfield Road	Birmingham	Staffordshire	B43 5AW
↗			1	Blenheim Drive	Birmingham	Staffordshire	B43 5BP
↗			1	Winster Road	Birmingham	Staffordshire	B43 5BS
↗			1	Broomhill Close	Birmingham	Staffordshire	B43 5BT
↗		1 Oatfield Court		Hamstead Road	Birmingham	Staffordshire	B43 5BW
↗			1	Heather Road	Birmingham	Staffordshire	B43 5BX
↗			1	Ingram Drive	Birmingham	Staffordshire	B43 5BZ
↗			1	Brookside	Birmingham	Staffordshire	B43 5DB
↗			1	Valerie Grove	Birmingham	Staffordshire	B43 5DH
↗			1	Valley Road	Birmingham	Staffordshire	B43 5DN

**Additional information tab** – here, you can type in any necessary additional information. This tab also enables you to upload documents including word processed documents, PDF or excel spreadsheets.

**Tracking tab** - here you can view any recent changes to the profile of the individual. This includes the date and time of any changes and who made the changes.