



Services | Service Teams

Setting up a Service Team

Records such as involvements, activities and provisions are owned by a specific service team and access is controlled accordingly.

A service team must be linked to an establishment that represents a hierarchical team structure with posts and team members. Posts and establishments must be set up before a service team can be created.

- Posts are set up via **Tools | Team Structure | Posts**.
- Establishments are set up via **Tools | Team Structure | Establishments**.
- Service teams are set up via **Focus | Services | CSS Service Teams Administration**.

The following business rules apply:

- A person can be a member of more than one post.
- The post must contain at least one member with a current or future start date to make it available for selection in the establishment.
- A post can only be in one establishment.
- An establishment must be linked to a service team.
- A service team must be linked to one or more involvement forms.
- The caseworker who creates an involvement record for a student must be assigned to a post in the establishment, that is linked to the service team.
- A default Access Control List (ACL) set for the service team, automatically cascades to all its records. This can be amended at individual record level.

Creating a Service Team

To create a service team:

1. Select **Focus | Services | CSS Service Teams Administration** to display the **CSS Service Team Enquiry** page.

Click the **Search** button to display the browse list of service teams that have already been created.

2. Click the **New** button to display the **CSS Service Team Definition** page.

3. On the **CSS Service Team** panel, enter a **Service Team Name**.

4. Select the required check boxes:

- **Exclude Involvements from CSS/SEN Summary Reports by Default** - enables you to deny confidential information to other services and agencies.
- **Show Hearing Impairment, Show Visual Impairment** - select to make the tabs available to the service team in v4 Client and v4 Online.
- **Timelines can be Deleted** - select to allow the service team to delete timelines in v4 Client and v4 Online

5. Enter a **Service Telephone** number.

6. Enter a **Service Email** address.

7. Click the **Address** icon to display the **Address Enquiry** dialog.

8. Select an address.

You now need to link an establishment to the service team.

Service Team Name	Exclude Involvements from CSS/SEN Summary Reports by Default
	No
	Yes

01. CSS Service Team

Service Team Name: [Text Field]

Exclude Involvements from CSS/SEN Summary Reports by Default:

Send To ContactPoint:

ContactPoint Sensitive Service:

Service Type: [Dropdown]

Show Hearing Impairment:

Show Visual Impairment:

Service Telephone: [Text Field]

Timelines can be Deleted:

Service Email: [Text Area]

Address: [Text Field]

Organisation Name: [Dropdown]

Establishment: [Text Field]

Send to ContactPoint, ContactPoint Sensitive Service, Service Type and Organisation Name are not required.



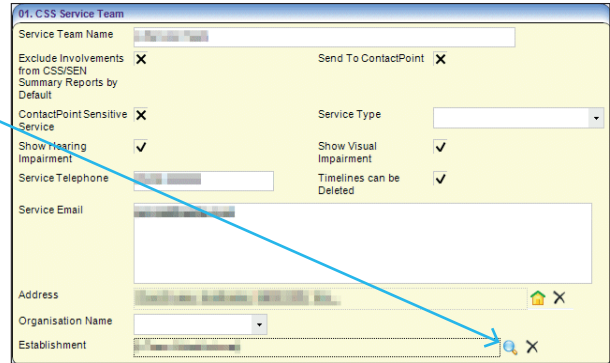
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Linking an Establishment to the Service Team

To link an establishment to the service team:

1. On the **CSS Service Team** panel, click the **Establishment** browse to display the **Establishment Definition Enquiry** dialog.
2. Select an establishment.
3. Click the **Save** button.



Populating Service Team Defaults

The remainder of the **CSS Service Team Definition** panels are populated with default items appropriate to the service team. The following table indicates the source of the service team default items. In most cases these are lookups that are pre-populated via **Tools | Administration | Lookups**.

Panel No.	Panel Title	Populate From	Additional Information
2	Communication Categories	Table_ID 1065	Communication categories are for reporting purposes only.
3	Activity Types	Table_ID 1055	
4	Activity Focuses	Table_ID 1056	
5	Activity Target Groups	Table_ID 1057	
6	Activity Support Types	Table_ID 1058	
7	Provision Funding Bodies	Table_ID 0126	
8	Provision Records	Table_ID 0822	
9	Activity Time Categories	Table_ID 1061	
10	Service Category	Services Service Category	
11	Activity Attendance Codes	Table_ID 1068	
12	Activity Outcomes/Aims	Table_ID 1070	
13	Activity Templates	Data Management Templates	This panel is specific to PULSE licence holders.
14	Charge Types	Services Provision Charge Types	This panel enables you to link a charge type to a service, allowing it to be independent of a service provider link.



Related Reference Guides

- RG_Team Structure_Setting up a Post
- RG_Team Structure_Setting up an Establishment
- RG_Involvements_Creating an Involvement Form
- RG_Involvements_Creating an Involvement Record



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Deleting a Service Team

A service team can only be deleted if there are no records attached to it. If there are records attached to the service team, these must be deleted or reallocated to another service team. Deleting or reallocating a record should be carried out in accordance with the Local Authority's policies and processes with regards to data retention.

If a deleted service team is mentioned in another service team's Access Control List, the ACL is updated for the remaining service team's record.

When a service team is deleted, it is recorded in the Audit Trail.

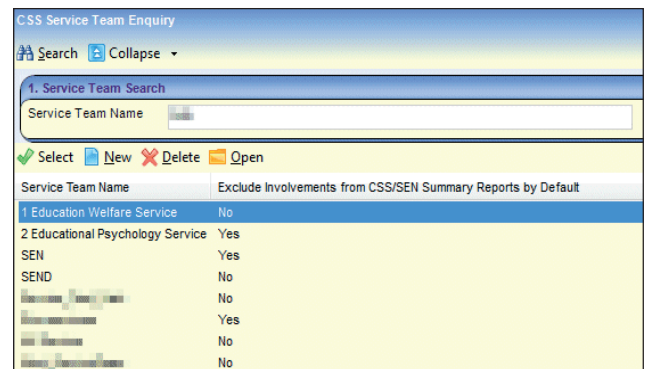
If a service team has been migrated from One v3, it cannot be deleted.

The following service teams cannot be deleted as they are seeded service teams:

- SEN (ID - 9999999999)
- Exclusions (ID - 9999999998)

To delete a service team:

1. Select **Focus | Services | CSS Service Teams Administration** to display the **CSS Service Team Enquiry** page.
2. Highlight the service team, then click the **Delete** button to display the **Service Team Confirm Delete** dialog.



The list displays the **Record Type** and the **Number of Attached Records**.

3. Click the **Confirm Delete** button to remove the service team. Once the service team has been deleted, it cannot be retrieved.

