

## WYFY Understanding You Guidance

The Understanding You form is used to capture the relevant information for a customer and to translate this into a plan to support the customer to achieve agreed goals.

This guidance is aimed at giving more clarity on how to use the Understanding You to best record the information:

### **Part 1**

#### **Customer details:**

This is the first section of the form and will contain the basic details of the customer, including the SWIFT id where this is known.

#### **Who did the Customer contact first:**

This section is used to record the details of the very first contact that a customer has regarding this particular issue or request.

The contact is recorded by whoever receives this first contact. It may be a receptionist, duty assistant or practitioner.

This is not the date a customer first engaged with any service that they may already be receiving.

This date starts the clock ticking for reaching the With You For You target of beginning to deliver services within 21 days.

*Note:* the first contact date does not get changed if the form is changed as part of a review, but would get changed if it is a re-assessment.

This section also records the information about the first person to receive the contact, giving their name, post, service name and contact details. This includes any administration or reception staff who start recording details on the Understanding You, even if it is as little as basic details and a brief description of the request.

#### **Person providing information on behalf of customer:**

This section can be opened up where the information is being provided by another person on behalf of the customer.

This is typically used where the customer lacks capacity or there may be a communication issue.

This section is not intended to hold information regarding the person collecting the information for a partner organisation.

#### **Emergency Contacts:**

All details and contact numbers for person's who can be contacted in relation to supporting the customer.

**Does not live alone:**

This section can be opened up if the customer is living with other people. The 'People living with you' table is completed.

**Current support:**

This is used to record all support and/or services currently in place for the customer. This should include all aspects of support including informal support e.g. from friends, family members.

**Current situation:**

This is where the holistic picture of the customer is recorded. It is important to remember that this 'picture' should only be concerned with what is relevant and appropriate to the circumstances relating to the support that is being sought. This is an important point as the customer is only asked to consent to information that is relevant and appropriate to this situation and nothing else.

This in no way should deflect from the aim of providing a holistic view.

Practitioners should anticipate that this section may be brief or quite long depending on the complexity of the customer's situation in relation to the request for support.

The Co-ordinator should end this section by providing analysis of how the information captured here has led to the agreed goals and needs which will be recorded in the plan. This is where the Co-ordinator describes why and how.

The analysis is important as it describes to other practitioners, and importantly service providers, the information on why the service is needed and how it will support the customer in achieving their goals. This is if you like, the justification, for the customer's need to receive the support along with the eligibility criteria.

**Consent:**

Select the appropriate category from the drop down list. Categories are described in detail in the Information Sharing Agreement document which is on the WYFY website, see Appendix C in the Guidance section.

Then detail the consent given where required, e.g. if they only want to share with particular agencies.

**Chronology:**

This is a snapshot of significant events for the customer. This provides an easy to read history of events which are important in the customer's situation and which will help other practitioners who may work with the customer.

Useful information can be recorded in the chronology without giving detail, e.g. a hospital stay, or family disruption.

### **Eligibility Criteria/Risk:**

All items recorded in this table should be assessed in relation to the national Eligibility Criteria guidance. A copy of this can be found on the WYFY webpage.

### **Summary of Current Situation:**

The summary gives a concise version of the information contained in the 'Current situation'. This is intended to be a quick to read and digest text that practitioner's who need to react quickly can turn to, e.g. in an emergency.

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This is the end of the first part of Understanding You.

If a Co-ordinator is asking for information to be contributed the request for information is recorded in the 'Actions' section of the form. The Co-ordinator will give specific instructions to the practitioner from whom they are requesting a contribution, i.e. do they want the information entered directly on the form or do they want the information sent to them for collation.

All of the information on this part of the form must be entered and shown to the customer before they sign.

This first part of the Understanding You should only be updated after a review or a re-assessment with the customer's agreement and a new signature. The Understanding You is not a case history of a customer. Any 'case notes' should be recorded by the practitioner according to their own processes.

## **Part 2**

### **The Plan**

The Plan is used to record the outcome of the analysis of the customer's situation and will record their goals, the needs linked to those goals and the actions that will be undertaken to support them in achieving their goals. It also contains a record of meetings and other relevant useful information that does not need to be recorded in detail on the plan.

The Plan can be updated as time goes on. It would be expected that the actions and needs will change over time as a person's situation progresses. It is up to the Co-ordinator to agree with involved practitioners as to how and when the plan is to be updated.

**Goals:**

The agreed goals are recorded in this table. If there is more than one goal it is helpful to number them. See example below –

Goal	Goal Status
1 – abcdefg	
2 – stuvw	
3 – xyz	

This table will change over time as goals are met.

**Needs:**

The needs which have to be met to support the Customer in achieving their goals are recorded in this table. Again it is helpful to number them and identify the goals that they are linked to. See example below –

Description of Need	Status
1 linked to goal 1- customer has need a.	
2 linked to goal 1 – customer has need b	
3 linked to goal 2 – customer has need c	
4 linked to goal 3 – customer has need y	

This table will change over time as needs change and their status changes.

**Action:**

The action table records all of the actions that are to take place in relation to the customer. This includes:

- Requests for information,
- Requests for meetings,
- Requests for services.

Again, try to link the action to a defined need using the numbering on the Goals and Needs tables. For example the meeting or services may be linked to meeting need. Therefore the action may state 'X service required to meet Needs1 and 2'.

This table will change over time as actions are completed and as other actions may become necessary to provide the agreed support.

**Meeting Record:**

This table is used to record ALL meetings with the customer. This includes one to one meetings. It also is used to record when the plan is created or amended. This will inform other readers of the last updates to the plan.

This information is very useful to other practitioners as they can see who has been involved at what point and who the customer has actually been in contact with.

Practitioners other than the Co-ordinator can update this table, remembering to archive the current copy as per training instructions. This will be particularly relevant when meetings have taken place and the Co-ordinator was not in attendance.

**Linked Information:**

Use this table to record where other useful and relevant information regarding the customer is held. Also consider where it would be useful for other practitioners to know that this information exists, even if they do not need to know the content, e.g. a complex OT assessment or specialist medical.

**Review date:**

Date of next planned review.

**Signatures:**

It is very important to record on the electronic version of the form whether or not the customer has signed the form and if so where it is stored. The detail of where the signed copy is stored is entered in the 'Signature' box. The date is also very important.

It is equally important to record the Co-ordinator information here.

The signature gives confirmation that the customer has seen all of the information contained on the form and agrees with the content. The signature only applies to consent in that it confirms the status of consent recorded in the 'Consent' section. A signature on its own with no information in the 'Consent' section does not imply consent.

The Co-ordinator will explain to the customer that Part 1 of the form will not change without their agreement and signature. Part 2, however, is the plan that will change as their situation changes.

If there is a significant change in circumstance Part 1 is updated and a new signature is required. This will be up to the practitioner's professional judgement as to whether this constitutes a re-assessment where a new 'First Contact' would be entered on SWIFT and a new WYFY referral and WYFY assessment recorded.