



Patchwork

A user guide

Contents

- 3 What is Patchwork?
- 4 How Patchwork is different
- 5 What Patchwork is not
- 6 Patchwork in Practice
- 7 By practitioners for practitioners
- 8 What practitioners told us
- 9 Security
- 11 How to use Patchwork
- 13 How Patchwork was developed

What is Patchwork?

The big idea: Professionals are better able to provide services to a client when they understand and can communicate with the whole team of people around a client or family

The added value: Patchwork helps reveal what are often hidden networks and can help you avoid some of the time you spend searching for other agencies and people working with a client

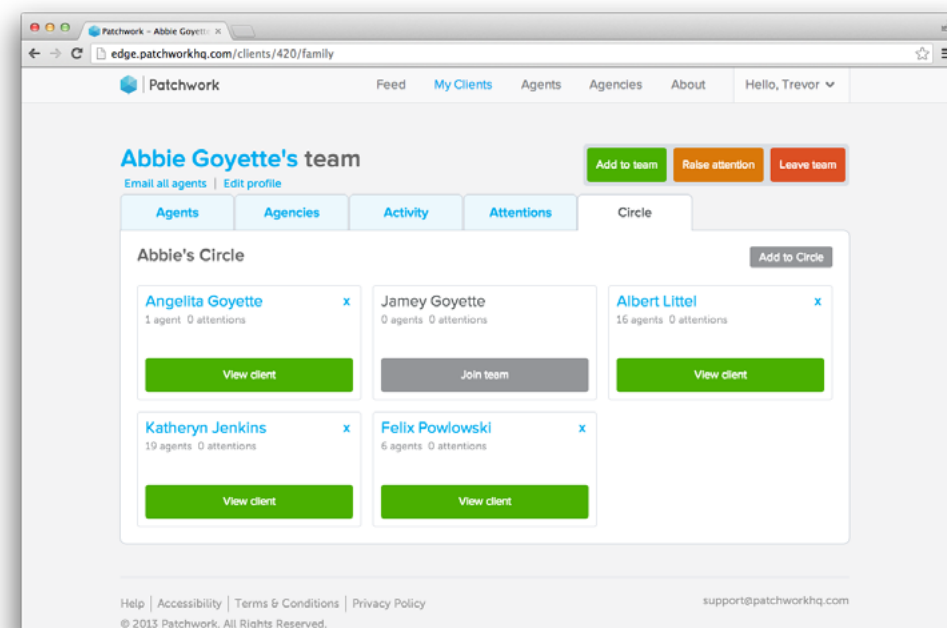
The Mantra: Our client, not my client

Patchwork is a simple web application, developed by [FutureGov](#), that allows people across the public and voluntary sectors to understand who is working with their clients at any given time; giving them the contact details they need to share information as appropriate.

Patchwork has been designed to help front line workers:

- Get a quick and easy overview of the people they are supporting
- Find out who else is working with them and how to contact them
- Be able to invite in others working with a client
- Keep the picture up-to-date for all involved
- Have a view of the family around the client

As a result, we hope that it will build connections between different organisations and agencies, enabling real partnership working, earlier intervention (helping to ensure that no client falls through the gaps) and ultimately better outcomes for children and families.



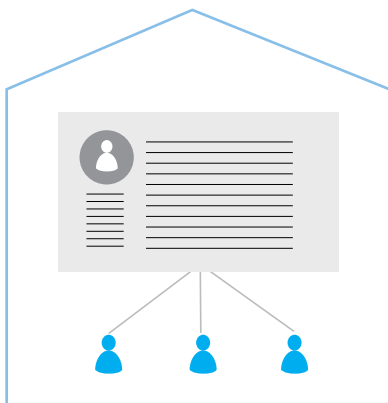
Watch a short film about Patchwork

<http://vimeo.com/futuregov/httpvimeocomwhatispatchwork>

How Patchwork is different

Patchwork differs from case management systems by only holding minimal data that can be shared across agencies and sectors. It is about the revealing the people working in the team rather than case notes.

Case Management System



An agent can view and share case notes with other involved agents.
Agents are from same sector and usually from same organisation.

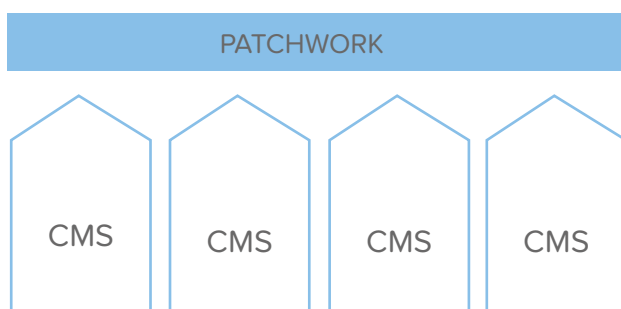
Constraint: Information is often too deep and detailed to share, Doesn't improve partnership working.

Patchwork



An agent can view the team around a client and their contact details. Agents can be from any sector and from many different organisations.

Opportunity: Light information can be shared and encourages human networks to work better together



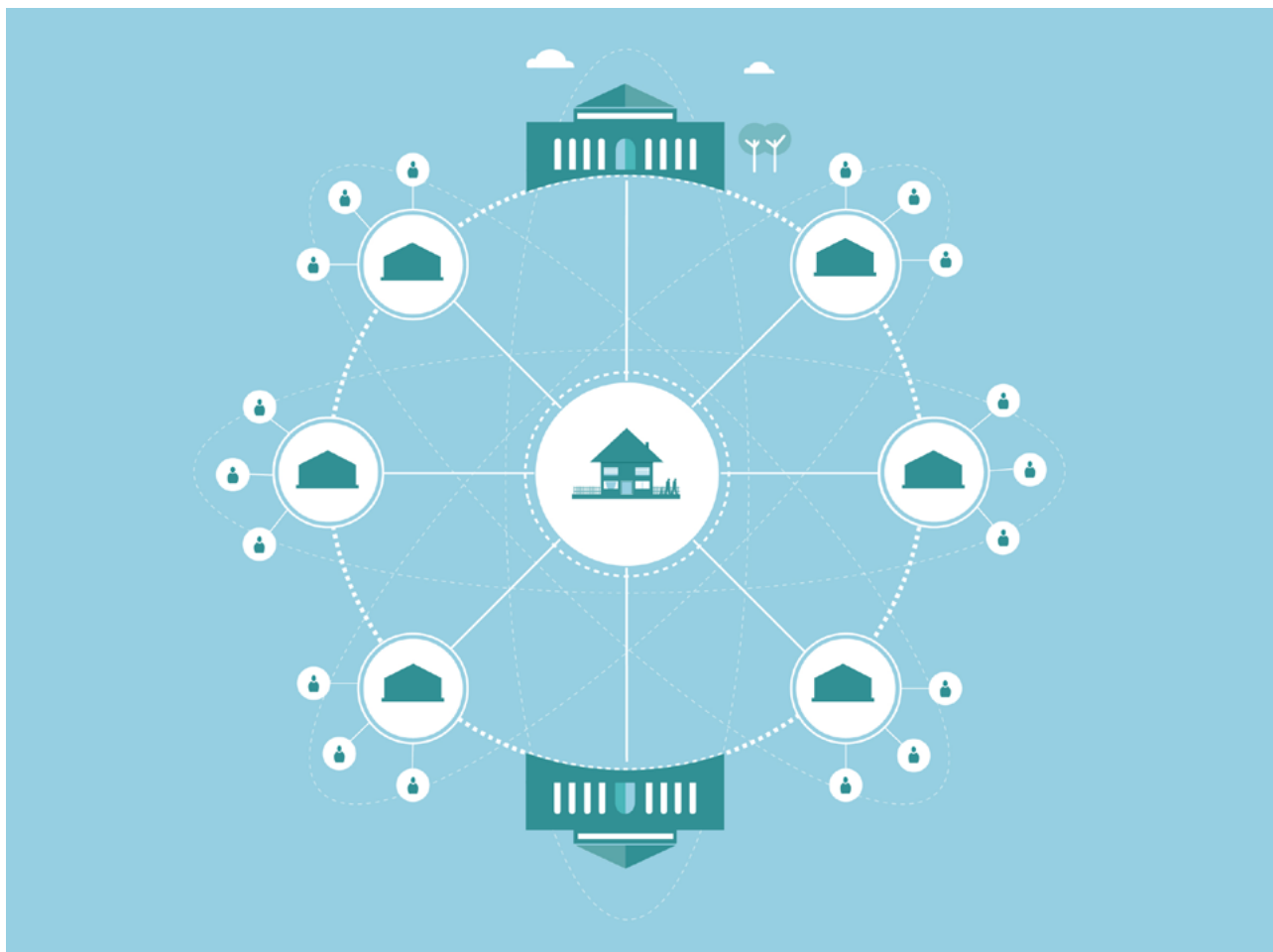
Each CMS system used by different agencies holds deep data that can only be viewed by agents that have right to access.

Patchwork sits across all systems and offers a shallow level of data that all sectors are happy to share.

What Patchwork is not

What is Patchwork not?

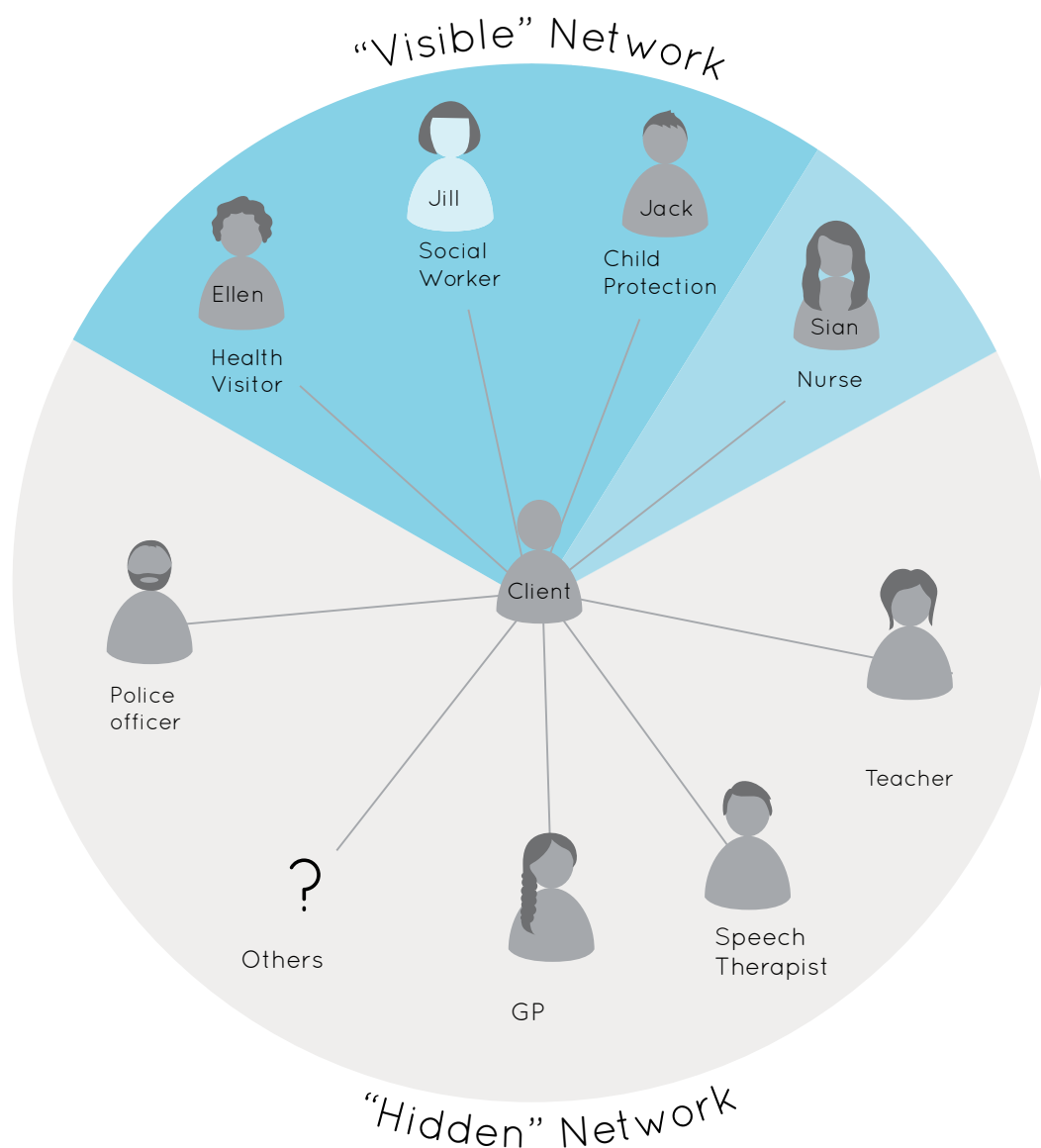
- An overly complicated system which requires lots of training
- A system which is ugly to look at or time consuming to use
- A case management or management information system
- A reporting tool
- Integrated with your other systems
- A replacement for making contact with the professionals linked to the same client inside or outside of the application
- A referral mechanism that replaces existing processes



Patchwork in Practice

A scenario

“Visible” Team - Currently, Jill (a social worker) knows that there are 3 other agents working with her client through case notes and speaking with the client. Ellen (health visitor), Jack (Child protection) know of each other’s and Jill’s presence, however Sian (District Nurse) only knows about Jack.



The “Hidden” network may include other agencies, schools, police, GPs and so on. These people may not realise the client is receiving services from other places. So, for example, if a teacher notices non-attendance or bruises, by logging in to Patchwork the network around that client is quickly revealed allowing the teacher to get in touch with other members of the team (eg. Jill) to discuss her concerns.

By practitioners, for practitioners

Patchwork has been developed with frontline practitioners. Understanding the aspirations and limitations of working within current systems has been at the core of the development of Patchwork.

Key Learnings During Insight / Research phase

1. Practitioners are frustrated by inconsistent relationships with clients.

Rooted in:

- Serious recruitment and retention issues
- High Case Loads
- Bad IT

2. Incomplete picture of the their clients (family and those working with their clients).

Caused by:

- Weak ties between practitioners and other organisations
- Confusion re data protection / privacy and consent - “who are we allowed to say what to?”
- No space / time for the voice of the client in shaping the team around them



What practitioners told us

What frustrates you about the way organisations currently work together?

“Time restrictions that limit working together. Not partnering when we could”

“lack of time/resources for networking”

“We don’t do it well enough because we don’t know who we are”

How would you like multi-agencies to work together?

“Better communication and cooperation”

“Share resources”

“Collaborative, for the benefit of the client without ego”

“Seamless communication about the client and their issues”



How do you think Patchwork could help you in your job?

“I think it will be a great tool to begin connecting professionals to start putting the child in the centre of a holistic approach”

“Give the “big-picture” quickly”

“Quick access to agency contacts”

“Linking providers, sharing information and improving services and outcomes for families”

“Save time chasing up workers”

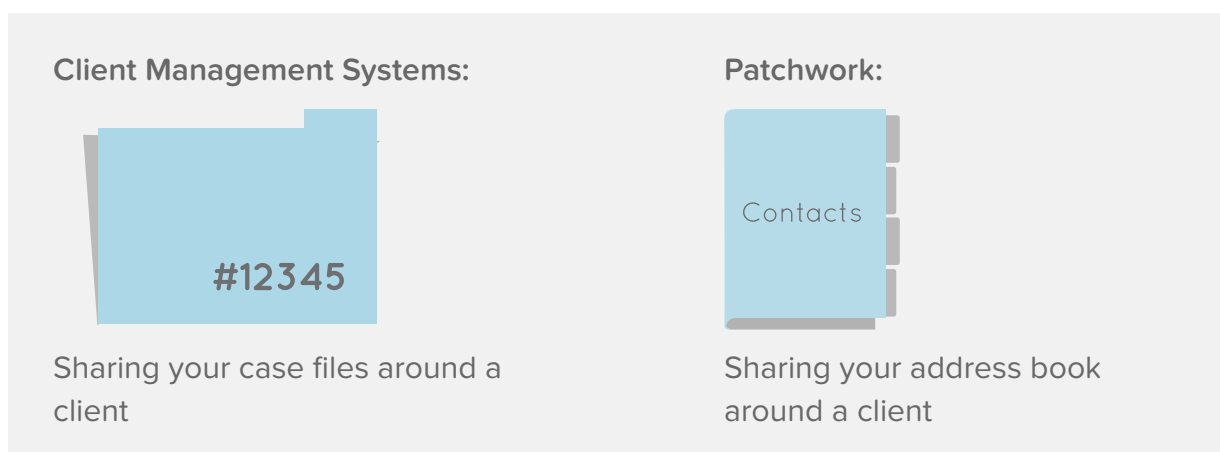
“Keep updated with other agents so work is not duplicated”



Security

Patchwork takes security of data seriously, and has been designed with some key security principles in mind:

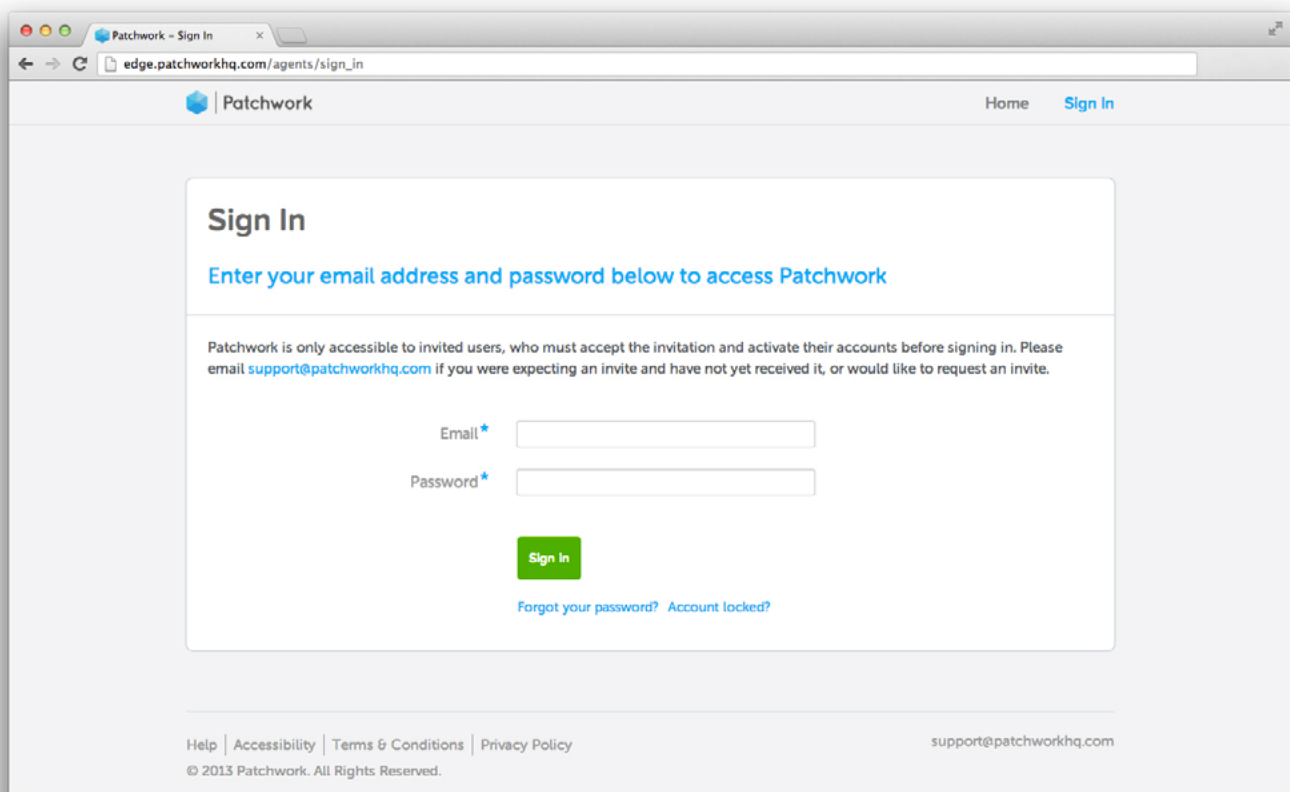
- There should be a purpose in entering a client on to Patchwork and this decision sits with practitioners as they are the experts in their case load
- Only minimum required data is held in Patchwork
- Files and attachments containing personal data cannot be uploaded in to Patchwork
- Only people working with a client can access data about a client
- Patchwork is supported by a range of documentation that makes people aware of their responsibilities regarding security of data
- Patchwork is compliant with the law and codes of best practice around security
- The duty to share can be as important as the duty to protect



These principles are translated into a number of design features that ensure security is embedded into Patchwork product and services.

Security for Users

- Access to Patchwork is restricted to approved users via a systems administration console
- Users create their own strong password and are in control of resetting their passwords
- There is a time out to ensure screens users don't stay logged in when away from their desks
- Activity in Patchwork is always logged and visible, to ensure "an all eyes on data approach"
- Only system administrators are able to approve users and create agencies to ensure data quality is maintained.



Security of Data

- There is no client search facility on Patchwork, meaning users need to have some basic information about a client before they can access them in the system.
- Users cannot see information on clients they are not working with.
- Only a minimum amount of data is held in Patchwork about clients (name, age, date of birth and address) There are no case files, case notes or case history
- All users of Patchwork can edit and maintain client information, and changes are shared with the client's team
- There is no facility to export client data from Patchwork
- Patchwork is hosted in a secure environment (IL2). Access to the environment is limited to severe maintenance issues
- We will never access client data unless there is a request from you or system maintenance issue. In either case we will always seek your permission first












How to use Patchwork

Patchwork has been designed to be as simple and easy to use as possible. However, if you need some help, here are a few useful documents about how and when to use Patchwork. Most users will also have a training session.


Click the image below to view a walkthrough guide (in the appendix of this doc)



Click the image below help understand how to use Patchwork alongside existing business processes

WHO	SCENARIO	ACTION
 Agent <div>ALL EXISTING PROCEDURES STILL APPLY</div>	 New Case	 Add client to Patchwork - only if there is a need
	 Case Work	 Look in Patchwork
	 Special attention needed on a Client	 Raise attention on Client in Patchwork for other practitioners to see
	 Discover new Agents, agencies that are relevant to your Client	 Add to Client's team in Patchwork or invite to join Patchwork
	 Need to contact all Agents working with your Client	 Email all Agents from client team page
HOW CAN PATCHWORK SUPPORT ME IN MY ROLE?		

To view what updates have been made to Patchwork, click below to be taken to the Patchwork Blog.

 **Patchwork**

AboutBlogContact

May 13, 2013 | by Kirsty Elderton | Comments - 0

Making Patchwork Happen in Brighton and Hove

Thanks go to Paul Brewer, Head of Performance for Children's Services in Brighton and Hove Council, for writing this guest post for us. As well as leading on all things performance for Children's Services, Paul has also been leading the Patchwork project in Brighton and Hove.

He has been involved with the project from the very beginning and here he shares some of his thinking about what it takes to make Patchwork happen on the ground.

Patchwork is not a technology project...

Patchwork is an incredibly interesting and challenging project to work on. I remember back at Brighton & Hove's launch event in November 2011, Carrie from [Futuregov](#) put up a slide of a road stretching out to the horizon, talking about how Patchwork was not a technology project. Well, that was so true!

It is about connections across agencies

In the period since, I've seen some amazing connections made between different practitioner groups, deep discussion about the nature of multi-agency working and growing confidence around the need to get on and share information to help provide the best care.

Patchwork has also helped bring support services from different organisations together. Having a real thing to discuss and implement has been really galvanizing and helped lots of people move away from abstractions. It

AllBrightonFeaturedFeedbackStaffordshireSurrey

Subscribe via RSS

Search

Recent Posts

[Making Patchwork Happen in Brighton and Hove](#)
13 May 2013

How was Patchwork developed?

Developed in response to the Baby Peter tragedy, FutureGov have worked closely with users and front-line staff to design the tool. This began with a research phase in Westminster Council, and then a partnership with Lichfield Council in the UK.

Front-line practitioners said a huge barrier to working collaboratively with other agencies was they simply didn't know if other organisations were also working with their clients – and if so, who they should contact from them. So FutureGov worked directly with users to design an application that allowed them to see exactly that – who else is involved and how to get in touch. Having built a prototype app, this was then tested with staff in Lichfield and Patchwork was developed. It has now been implemented in councils in the UK and there is a current proof of concept project in Victoria, Australia.

Who are FutureGov?

Over the past 4 years, FutureGov has worked with over 50 clients in the digital innovation space, drawing on our design, technology and change skills to help identify challenges and work with users to define and deliver solutions. We have worked across the UK with Districts, Unitaries and Counties from Surrey to Staffordshire, Brighton to Camden.



Patchwork

Product Walkthrough - Version 3.0

www.patchworkhq.com

@patchworkhq

Patchwork Software

A walkthrough guide

This document takes you through the key components of the Patchwork system.

There are a number of different terms used in this document to define types of people who use or are involved in the patchwork system.

Agency -

An organisation who an Agent works for

Agent -

A person who is responsible for working with clients

Client -

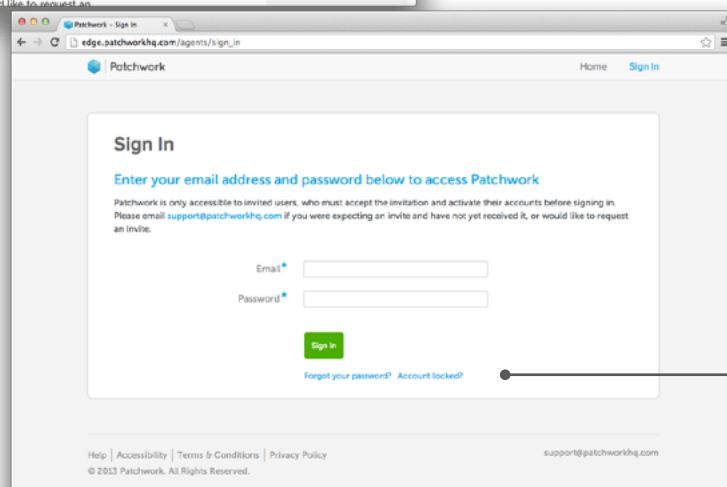
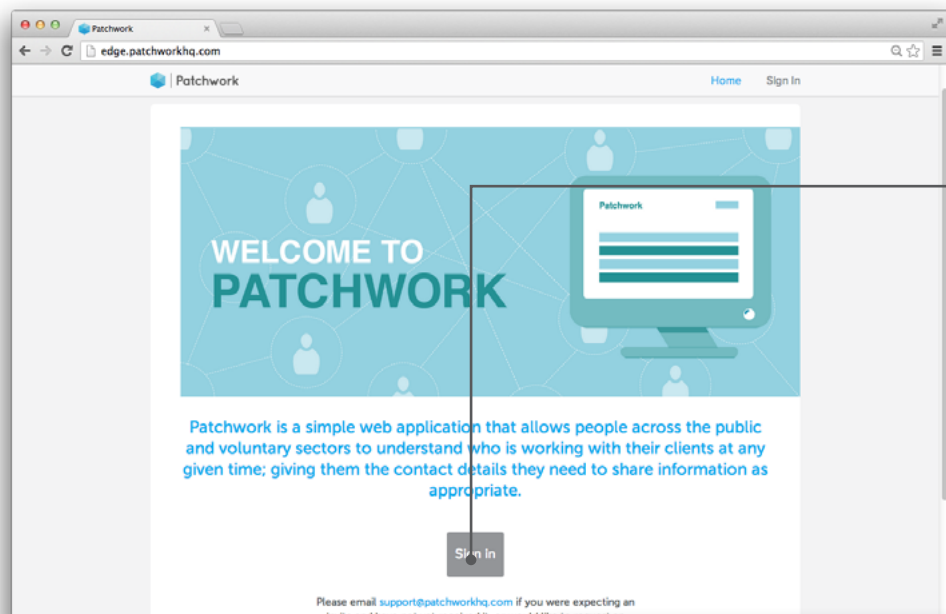
A person whose information is recorded in the Patchwork system and to whose profile agents are attached

Circle -

A group of people who are connected to your client (eg. Family, partner, close friends)



Landing Page and Sign in



Welcome to Patchwork

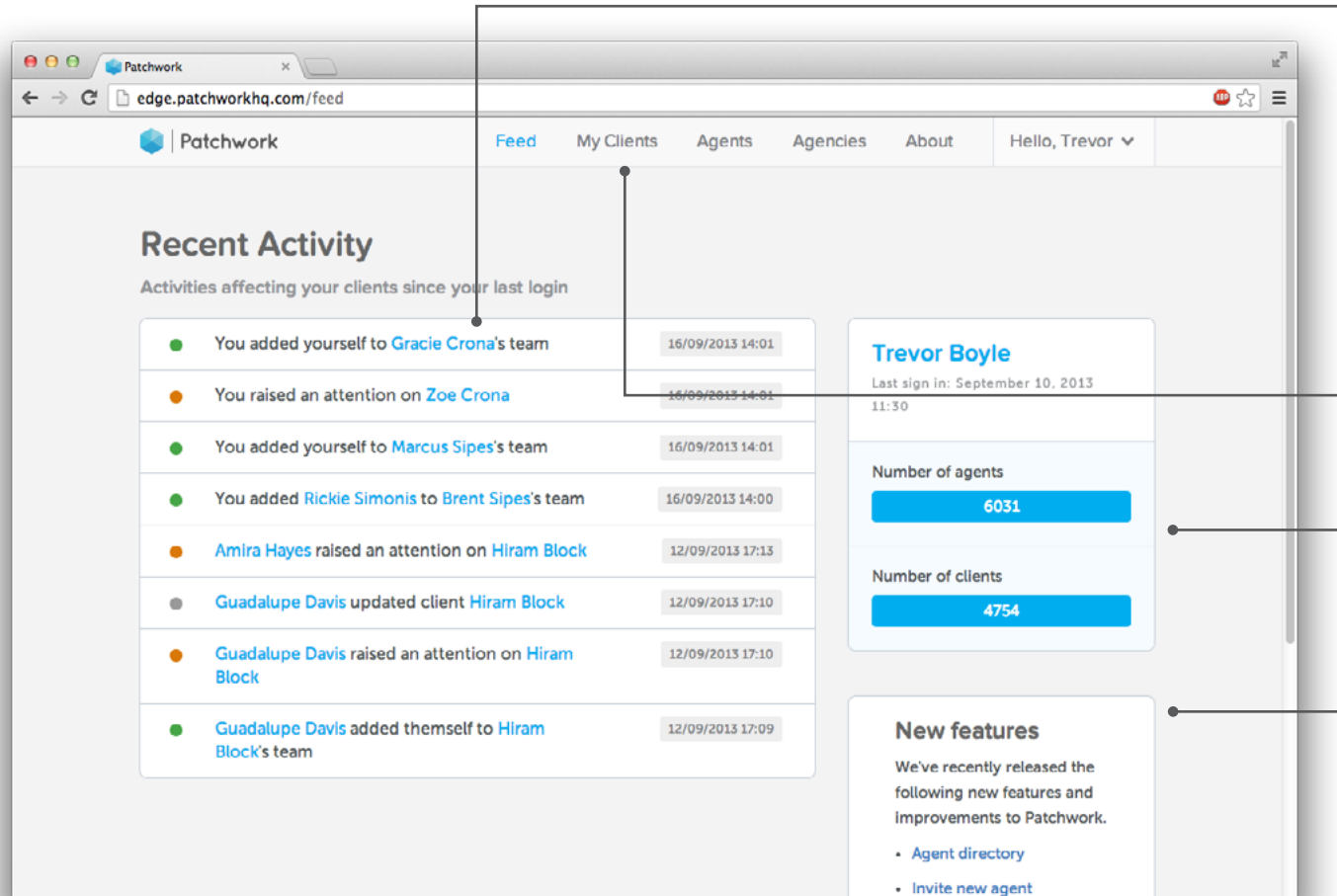
On the landing page, visitors can read introductory information about Patchwork.

Agents can access sign in here.

If you don't have a log in - email your systems administrator on their Patchwork email.
e.g. **patchwork@mav.asn.au** to join Patchwork.

If you lose your password or can't access your account use the links below for help.

Activity Feed



Features of the Activity Feed

After signing in, you will be greeted with your Activity Feed. This shows changes that have happened since your last log in:

- Clients that have been added or removed
- Agencies that have added or removed
- Attention raised on a Client
- Information edited by another Agent

The the primary navigation at the top of the page lets you navigate the main sections of Patchwork.

This box displays a summary of the data from Patchwork in your area.

There are links to information on any new features that have been added to Patchwork and how to use them.

My clients - Adding new clients

The image shows three overlapping screenshots of the Patchwork web application interface. The top screenshot displays the 'My Clients' page, which includes a table of clients and an 'Add a new client' button. The middle screenshot shows the 'Add New Client' form, which has sections for 'Personal details', 'Aliases', and 'Addresses'. The bottom screenshot shows a 'Duplicate record prevention' warning for a client named 'Aaliyah Reichert', with a 'Yes, this person' button. Lines connect the text on the right to these specific UI elements.

Name	Team size	Attentions Count	Last activity
Hiram Block 2 other agents have raised their attention on this client	26 agents	2 attentions	12 Sep 2013
Aaliyah Reichert You have raised attention on this client	39 agents	1 attentions	28 Aug 2013
Abbie Goyette You have raised attention on this client	43 agents	1 attentions	12 Aug 2013

Clients list

The Clients page displays a list of all your clients and a summary of their team's activity. To view a client's team, click on their name.

Using the filters on the top right you can order your Clients by:

- Attentions
- First Name
- Last Name
- Last Activity

Add a new client by clicking the **Add A New Client** on the top right.

This will bring up a form where you can enter your clients' details and add them to your client list.

When adding a client to Patchwork, the system checks to see if the client has already been added. Where a match is found you are able to join the team rather than creating a duplicate.

Team Page

The screenshot shows the Patchwork interface for a client named Hiram Block. The main heading is "Hiram Block's team" with links for "Email all agents" and "Edit profile". At the top right, there are three action buttons: "Add to team" (green), "Raise attention" (orange), and "Leave team" (red). Below these is an orange notification bar stating "2 other agents have raised their attention on this client". A tabbed interface shows "Agents" as the active tab, with other tabs for "Agencies", "Activity", "Attentions", and "Circle". The "Agents" tab displays a table of agents:

Name	Agency	Email	Status	Remove from team
Amira Hayes	Altenwerth-Schinner	agent4@patchworktest.com	Activated	Remove this agent x
Cade Hegmann	Reynolds, Morissette and Rosenbaum	agent4301@patchworktest.com	Activated	Remove this agent x
Declan Wyman	Halvorson and Son			
Donato Stamm	Klein, Conn and St			
Elizabeth Jacobson	Schroeder, Adams			
Emanuel Erdman	Larson, Boehm and			
Emilio Predovic	Larson, Boehm and			
Eveline Nolan	Altenwerth-Schinn			
Freddy Ryan	Halvorson and Son			

A modal window for "Hiram Block" is open, showing details such as "Date of birth: 1993-08-06", "Aliases", "Addresses" (54 Brooke Street London NW6 8PD and 65a Southgate Street London E5 9TT), and "Telephone numbers" (07847 728 827 and 0208 375 8372). The modal has "Edit this client" and "Back" buttons. Callout lines indicate the following features:

- The "Add to team", "Raise attention", and "Leave team" buttons.
- The orange notification bar indicating attention from other agents.
- The "Agents" tab and the table of agents.
- The "Hiram Block" client profile modal.

Features of the Team Page

By clicking on a name in your Client's list you will be taken to their Team Page.

The coloured action buttons at the top of the page allow you to:

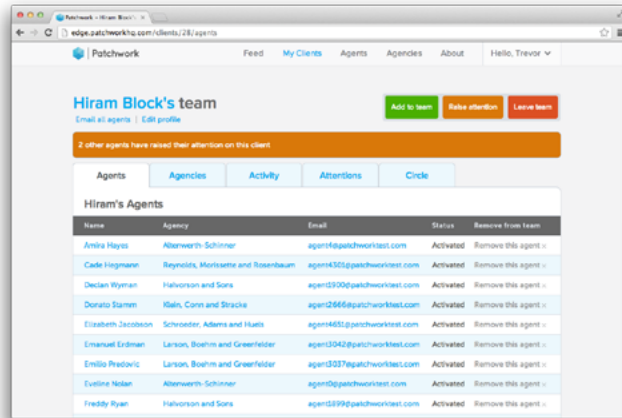
- Email all the agents on this client's team
- Leave the team
- Raise attention on this client for the other agents to see

When an attention has been raised on a client it will be displayed at the top of this page.

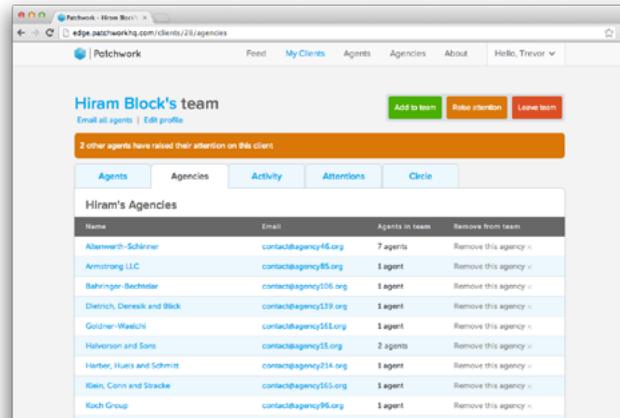
By clicking on the client's name you can view their profile, including DOB and contact details.

Using the tabs, you can view team around the client (agents and agencies), activity relating to this client, historical attentions and their Circle.

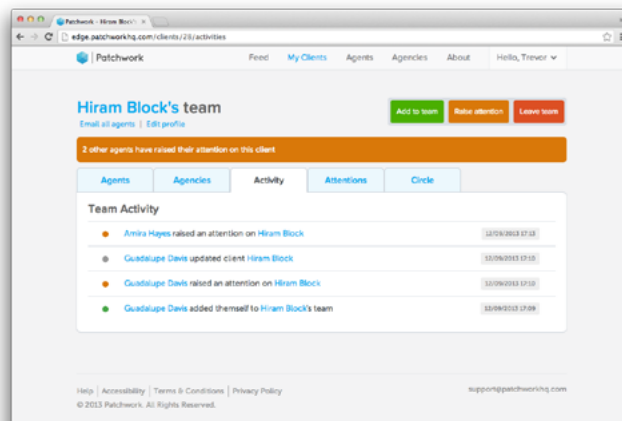
Team Page - Tabbed Interface



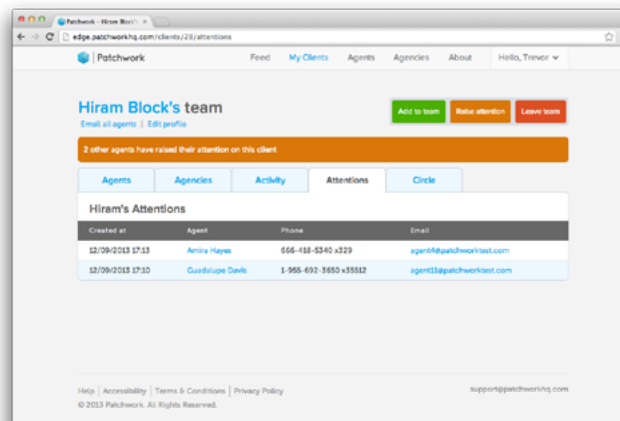
1. Agents



2. Agencies



3. Activity



4. Attentions

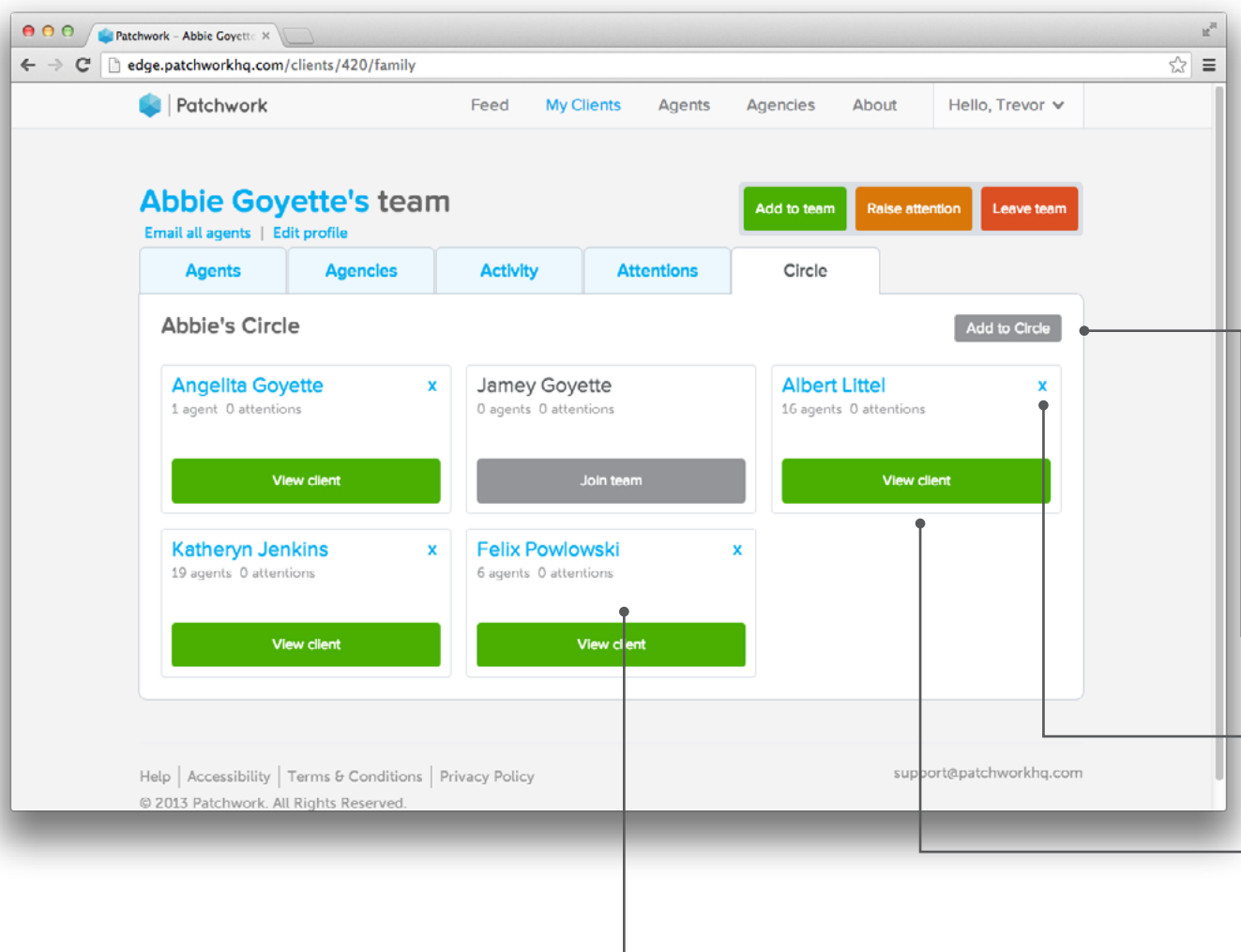
Using the tabs

The tabs on your Team Page allow you to view all the information related to the team around the client.

By clicking on the tabs you can view:

1. The individual Agents working with this client and their contact details
2. The Agencies working with this client
3. Any activity relating to this client by you or any other practitioner in their team
4. Attentions raised on this client by you or any other practitioner in their team

Tabbed Interface - Circles



Circles

The 5th tab is Circles. The Circles function allows you to connect your client to people who are important in their lives (and who's activities may have an impact on your client). These may be people in their family, members of the household or other significant relationships.

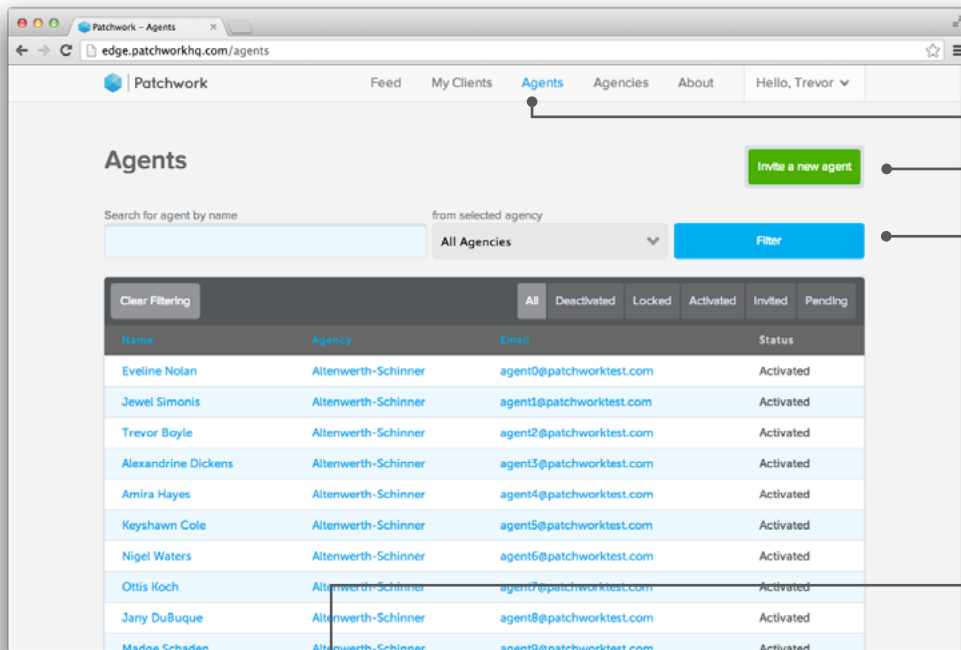
Any Agent working with the client can add or remove people from their Circle (all agents will see the same).

To add a new person, click **Add To Circle**. You will be able to add any of your clients to the Circle. You can add more than one client to the Circle using multiple selection tick boxes.

To remove someone just click the cross in the top right corner.

You can view the Client page of people in the circle by clicking **View Client**.

If there are people in the Circle who are not your client (i.e. If another Agent has added them), you can join their team by clicking **Join Team**.



Search for and add an Agent

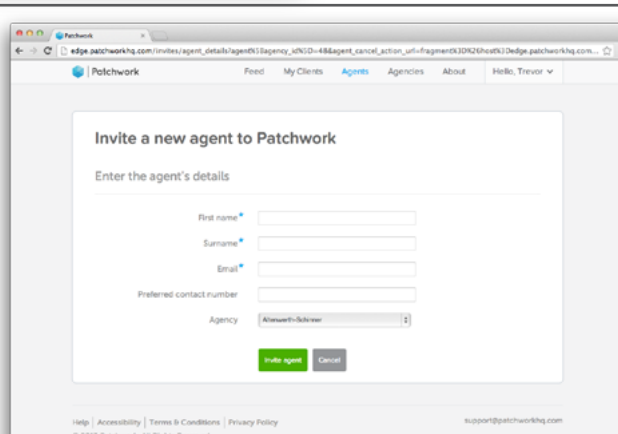
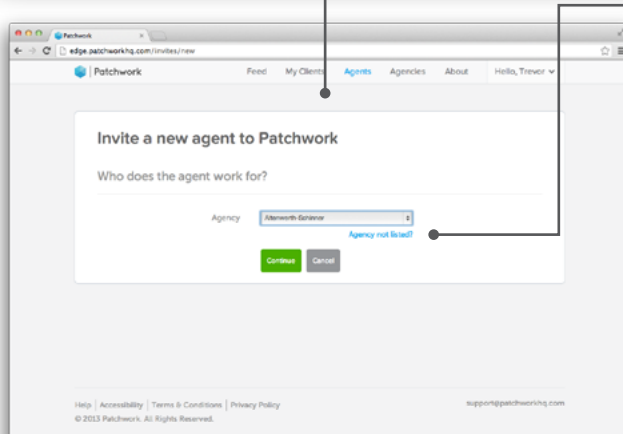
By clicking **Agents** you can view all the Agents using Patchwork in your area.

If you want to find a specific agent you can use the search functionality.

You can search for an agent by name, or filter the agents by agency using the dropdown menu, or a combination of both.

To invite a new agent to Patchwork click **Invite A New Agent**. Choose the agency they work for and add their details. They will then be sent an invite email.

If the agency is not listed you can request for them to be added or them to be added by clicking **Agency Not Listed?**



Agencies

The screenshot shows the Patchwork web application interface. The navigation bar includes 'Feed', 'My Clients', 'Agents', 'Agencies', and 'About'. The 'Agencies' page displays a table of agencies with columns for Name, Reception telephone number, and Email. A callout box shows the details for 'Altenwerth-Schinner', including its contact information and a list of agents. An 'Edit this agency' button is visible in the callout.

Name	Reception telephone number	Email
Altenwerth-Schinner	225-922-7455 x036	contact@agency46.org
Armstrong LLC	765.584.6757	contact@agency85.org
Bahringer-Bechtelar	(216)277-8227 x2001	contact@agency106.org
Bartoletti, Gorkzany and Rohan	113-369-8699	contact@agency111.org
Batz-O'Kon	064-969-0899 x764	contact@agency20.org
Beatty, Bergnaum		
Becker Group		
Beer, Goldner and		
Beer, Toy and K		
Beier-Grant		
Beier-Mosciski		
Berge, Turner and		
Bernhard, Bucke		
Blick-Hickle		

Altenwerth-Schinner [Edit this agency](#)

Reception telephone number 225-922-7455 x036

Email contact@agency46.org

Website http://www.agency46.com/

Description Fuga dolorum nihil qui possimus. Dolores ut sint asperiores corrupti. Et dolor ab et magni aut.

Agents

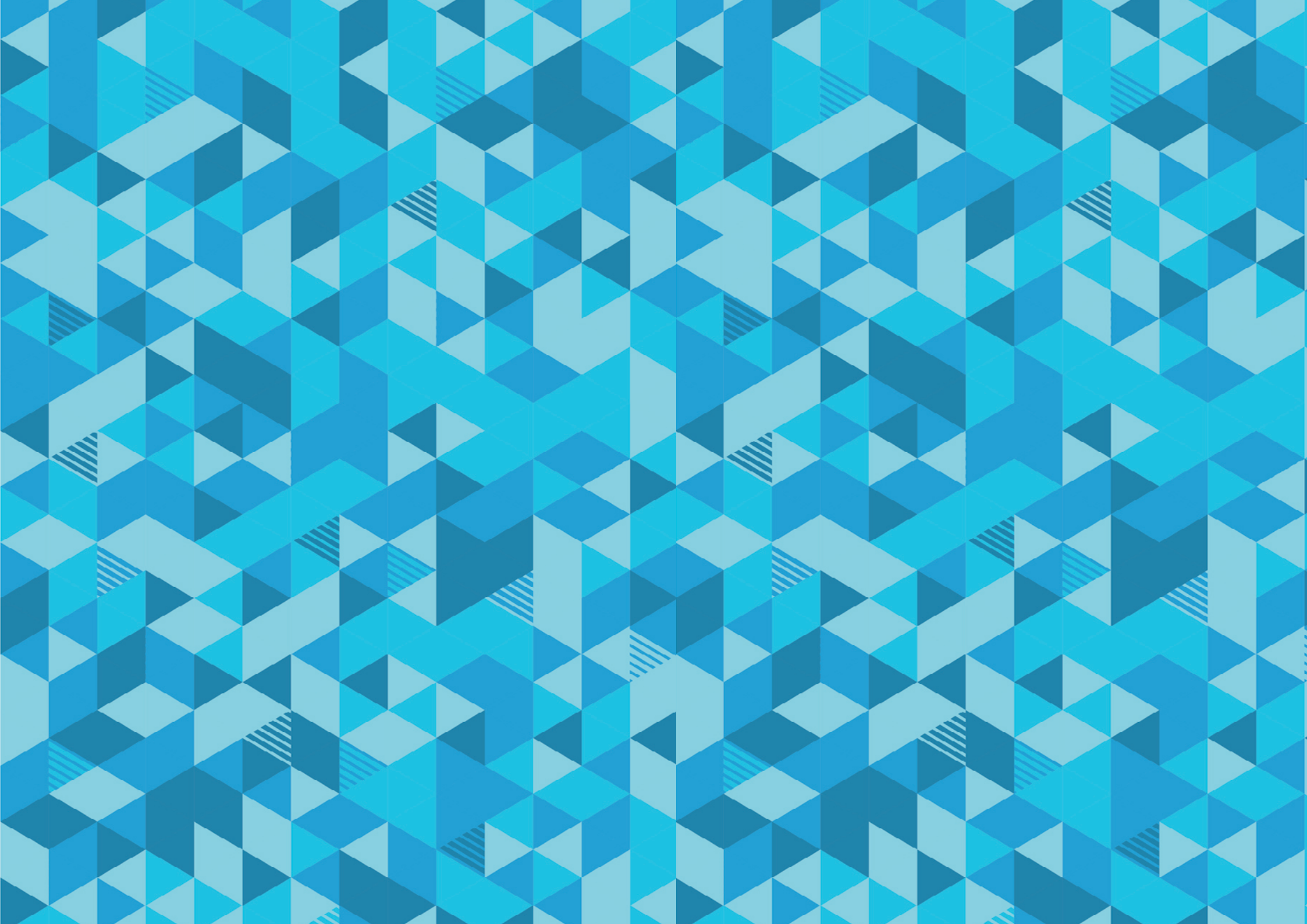
Name	Preferred contact number	Email	Role
Adela Erdman	077.563.2095	agent13@patchworktest.com	
Alan Bright	07828392746	alan@agency.com	
Alexandrine Dickens	136-346-9988	agent3@patchworktest.com	
Amira Hayes	666-418-5340 x329	agent4@patchworktest.com	
Augustine Tillman	076-083-5291 x9786	agent15@patchworktest.com	
	270-2889 x06822	agent25@patchworktest.com	











Viewing agencies

When you click **Agencies** at the top of the page you will be taken to a list of all the agencies using Patchwork in your area and their contact details

By clicking on an agency name you will see a longer description and a list of the individual agents working for that agency. You can edit the details here.

NB. To add a new agency to Patchwork email : **patchwork@mav.asn.au** with the Agency name and a brief description of why they should be added to Patchwork.



WHO	SCENARIO	ACTION
 <p>Agent</p> <div data-bbox="80 1061 604 1380"> <p>ALL EXISTING PROCEDURES STILL APPLY</p> </div>	 <p>New Case</p>	 <p>Add client to Patchwork – only if there is a need</p>
	 <p>Case Work</p>	 <p>Look in Patchwork</p>
	 <p>Special attention needed on a Client</p>	 <p>Raise attention on Client in Patchwork for other practitioners to see</p>
	 <p>Discover new Agents, agencies that are relevant to your Client</p>	 <p>Add to Client's team in Patchwork or invite to join Patchwork</p>
	 <p>Need to contact all Agents working with your Client</p>	 <p>Email all Agents from client team page</p>

HOW CAN PATCHWORK SUPPORT ME IN MY ROLE?

WHO



Agent

"The Agency / agent I need to add for my Client is missing..."



System Administrator



Agency

PROCESS



Add new Agency

NAME
E:
T:
WWW:

Input details

**GOES TO ADMIN
(control point)**

SHARING
GUIDELINES



Email Information
Sharing Guidelines



Added to Patchwork

OUTCOME



Agency available

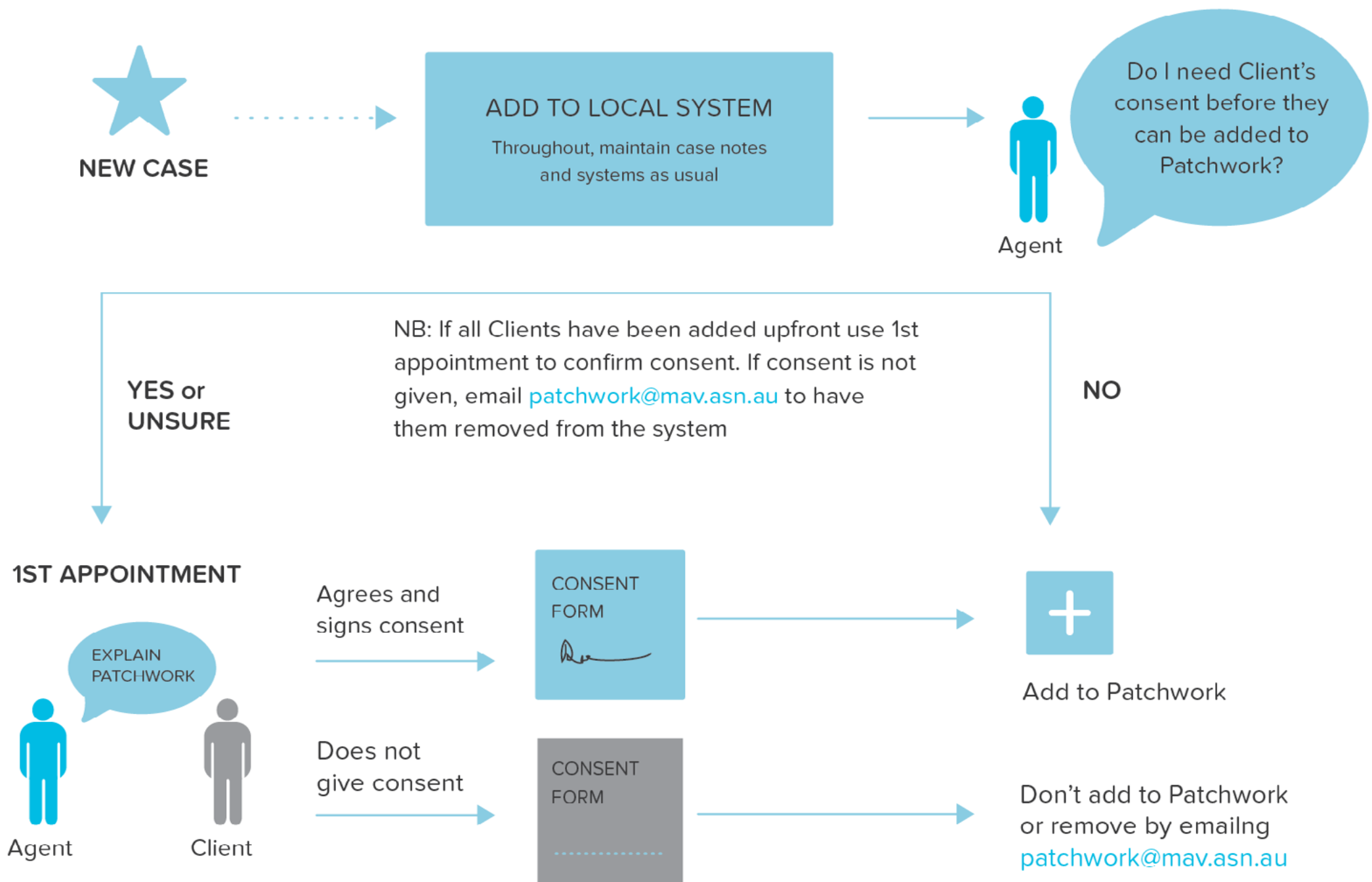


Agents can be added to
that Agency

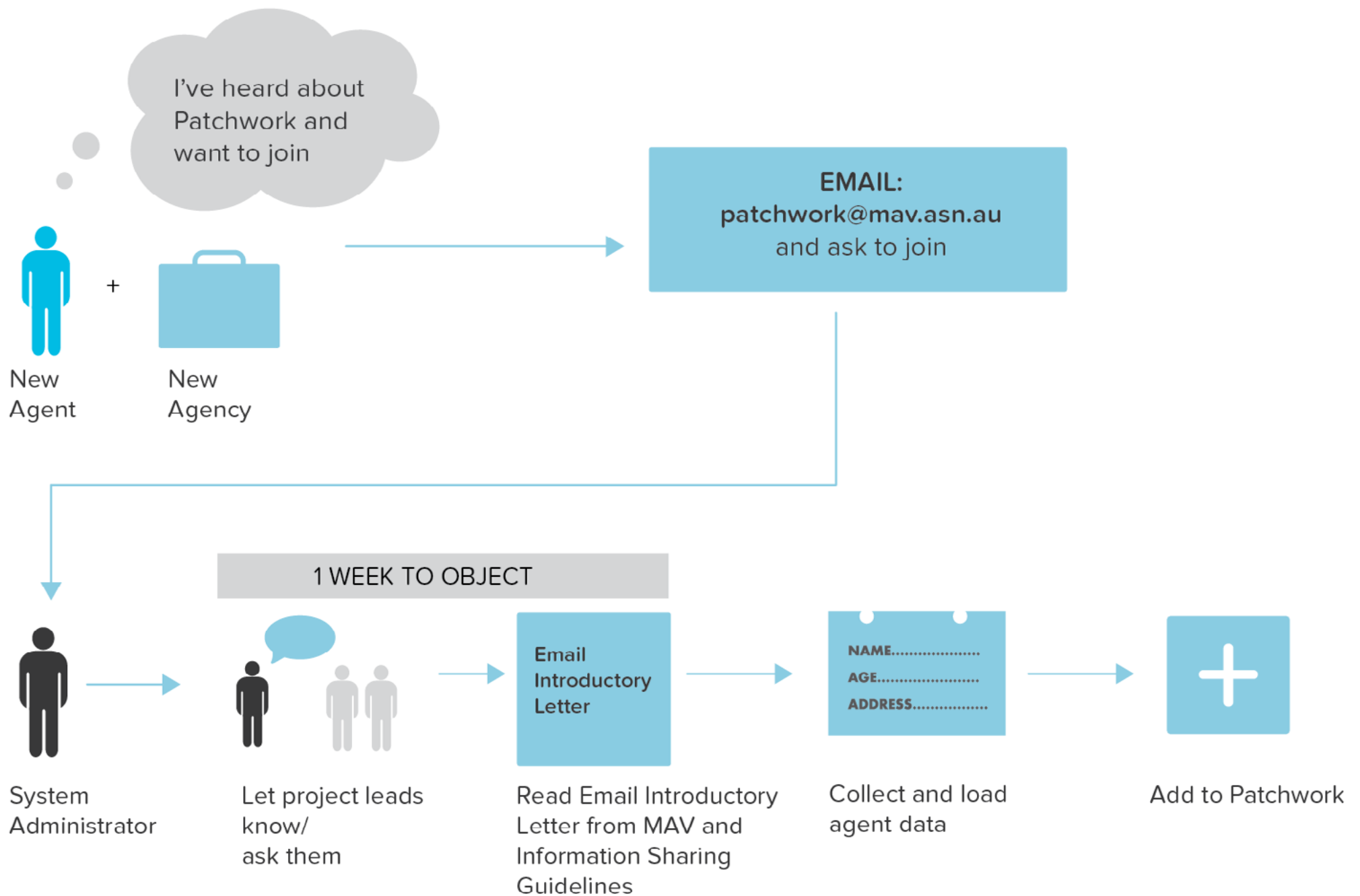


Agents or Agency to
can be added to
Client's team

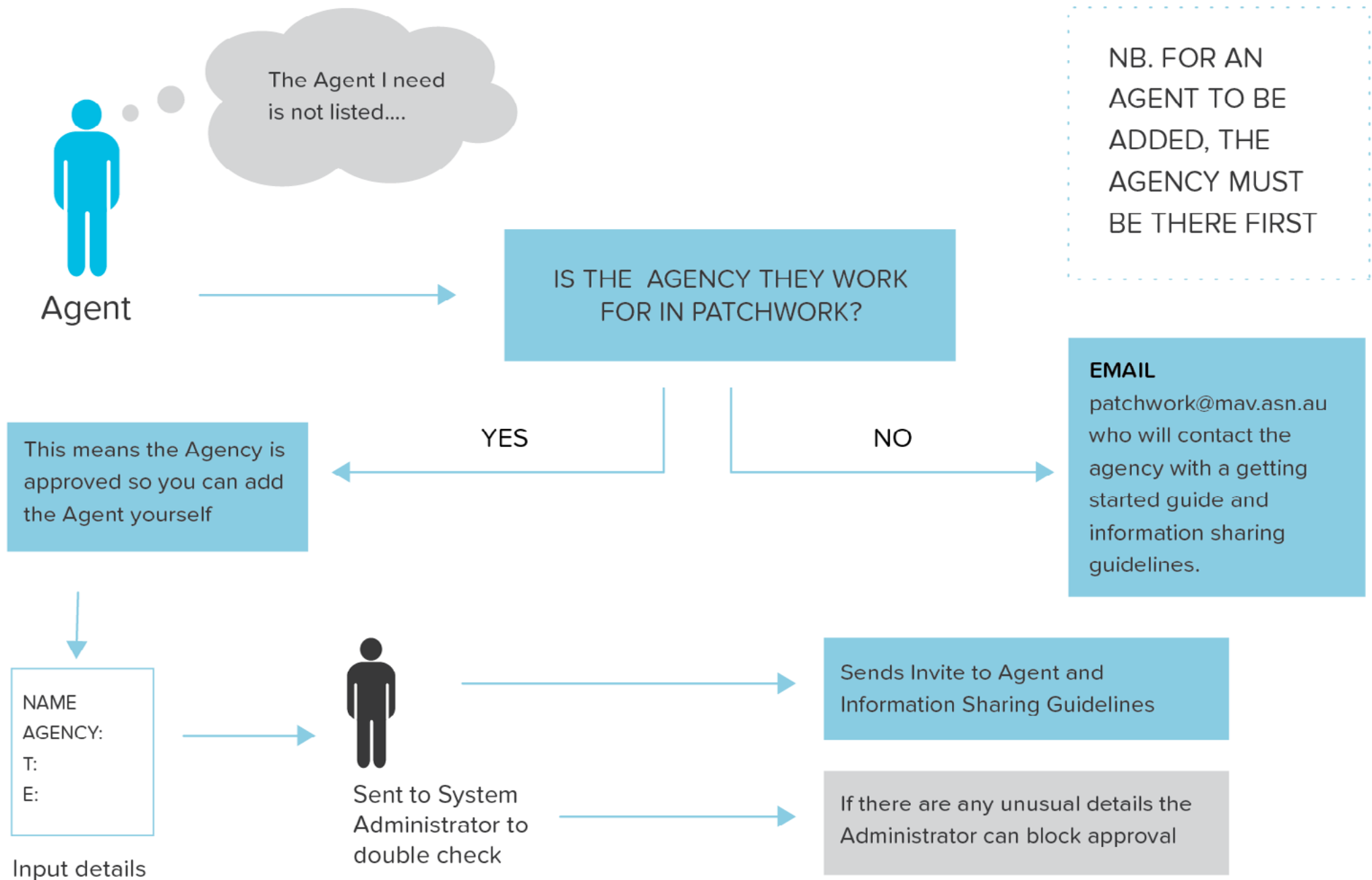
HOW DO AGENCIES GET ADDED TO PATCHWORK?



HOW DO I ADD NEW CLIENTS AND GET CONSENT?



I WOULD LIKE MY ORGANISATION TO JOIN PATCHWORK



WHO CAN ADD AGENTS TO PATCHWORK?



Agent

I'M LEAVING

I'M MOVING

I WON THE
LOTTERY

FOLLOW USUAL LOCAL EXISTING
PROCEDURES
(HR, IT, MANAGER ETC)

Remove yourself from
clients' teams on
Patchwork

Alert others that
you are leaving

EMAIL:
patchwork@mav.asn.au

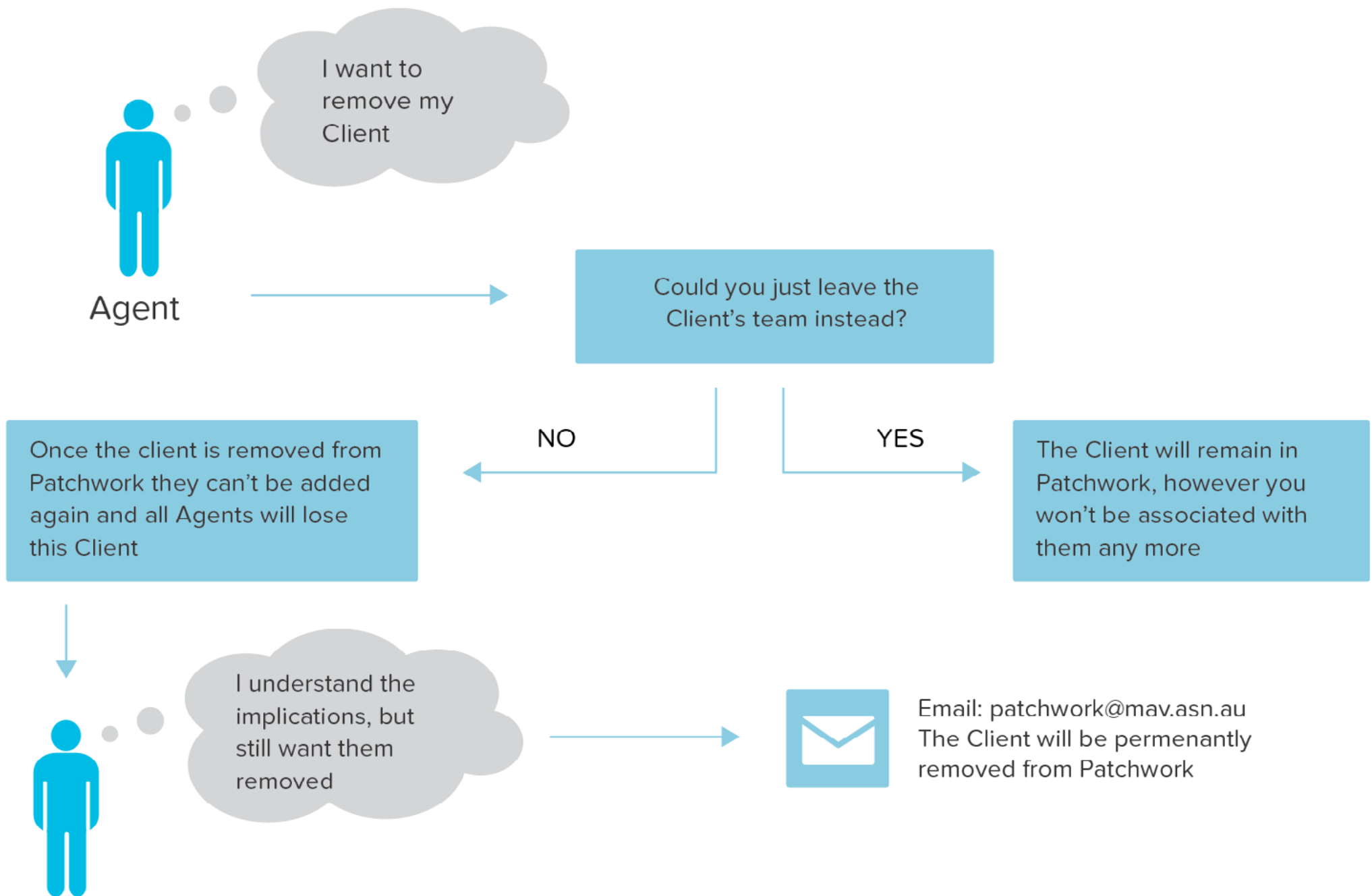
Supply leaving date



System
Administrator

Schedule closing of
account

I NO LONGER REQUIRE ACCESS TO PATCHWORK



HOW CAN I REMOVE A CLIENT FROM PATCHWORK?