

# Advice Note: 2011-2021 Recording the PSR Pilot Oral Screening Tool in NDelius

## Contents:

Introduction .....	1
Background .....	1
User Notes .....	1
Adding the PSR Oral Screening Contact .....	2
Completing the Screening Tool using the IWP Template option .....	3
Uploading a completed screening tool to the contact .....	4
Contacts .....	5

## Introduction

This Advice Note provides all Probation Court Staff with recording the PSR Oral screening tool for PSR Pilot Courts.

## Background

This tool is to enable PSR writers to screen report requests from the three cohort groups of Women, and under 25 and those at risk of custody.

This criteria list will be smaller than the complexity issues assessed when oral reports are produced in non-pilot courts. [Please see Pre-Sentence Reports: Interim Guidance on Report Format Feb 2019.](#)

**Equip Link:** [https://equip-portal.rocstac.com/ctrlwebisapi.dll?id=webMyTopics.searchOne&k=225&as\\_sfid=AAAAAX6HSw1JSCJlzwui79T](https://equip-portal.rocstac.com/ctrlwebisapi.dll?id=webMyTopics.searchOne&k=225&as_sfid=AAAAAX6HSw1JSCJlzwui79T)

## User Notes

This guidance should only be followed in the 15 Courts running the oral screening pilot.

## Adding the PSR Oral Screening Contact

The following Contact Type has been created to allow court staff to add and upload PSR Pilot Oral Screening Tool and the outcome of the assessment in NDelius:

- **PSR Pilot Oral Screening Tool – Pilot Courts Only** (Code = PSRO)

This contact has been linked to the **All/Always** and **Courts & Reports** Contact Categories.

This contact can be recorded at Offender Level and/or Event Level in NDelius.

1. Find Person on Probation Case record or Create if not known
2. Navigate to the '**Contact List**'
3. Click '**Add Contact**' button
4. Select 'person' or 'Event' in the Relates To field
5. Select Contact Category
6. Select '**PSR Pilot Oral Screening Tool**' contact type



Figure 1 - Add Contact Details screen

7. Enter the Time and Date of the screening completed
8. Complete the Provider, team and Officer details
9. Select Outcome:
  - if you are recording prior to the completion of the screening tool, select '**Pending**' -this will also allow you to complete the template within NDelius.
  - If you have completed the tool, select the output of the assessment:
    - o Standard
    - o Oral
    - o Short Format
    - o Advice to Court – No Report
10. Enter Notes where applicable
11. Click Update Button

At this point the user can either create the screening tool from the template within NDelius or Upload a completed assessment.

**Add Contact Details**

Relates To: \* Offender - dev ops

Contact Category: \* Courts & Reports

Contact Type: \* PSR Pilot Oral Screening Tool - Pilot Courts Only

Description: \*

Alert the OM?: \* No

Date: \* 20/11/2021

Start Time: \* 16:16

Provider: \* ZZ BAST Public Provider 1

Team: \* National Admin

Location: \* Location 1

Officer: \* Baker, Karen (NPS - External Organisation)

Contact Outcome: \* [Please Select]

Sensitive Contact?: \* [Please Select]

Notes: \*

- Advice to Court - No report
- Oral
- Pending**
- Short Format Report
- Standard Delivery

NEXT APPOINTMENT

Next Contact Date: \*

[Save](#) [Update](#) [Document](#) [Print](#) [Cancel](#)

Figure 2 - Add Contact Details screen

## Completing the Screening Tool using the IWP Template option

Following on from Step 11 above

- Click the **'Document'** Button
- Click **'Confirm'** button
- Select **'NAT PSR Pilot Oral Screening Tool'** in template list
- Click **'Create from template'** button

**Document List**

Linked To: Contact

No Documents Exist for the current record

Template List: NAT PSR Pilot Oral Screening Tool

[Create from Template](#) [Upload Document](#) [Close](#)

Figure 3 - Document List Screen

- Complete the tool using the Update hyperlink and following current IWP process

**Document List**

Linked To: Contact

Document	Author	Date Created	Last Action By	Date Modified	WIP	
NAT PSR Pilot Oral Screening Tool_20112021_162548_ops_d_e228205.doc	Karen Baker	20/11/2021	Karen Baker	20/11/2021	N	<a href="#">view</a> <a href="#">update</a>

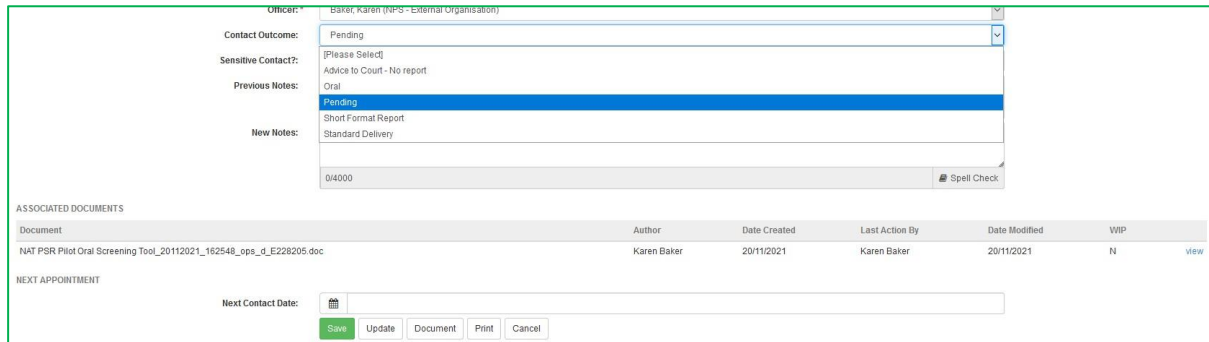
Template List: NAT PSR Pilot Oral Screening Tool

[Create from Template](#) [Upload Document](#) [Close](#)

Figure 4 - Document List Screen

Once the assessment has been completed close the document list screen and this will return the user to the Update Contact List Screen.

Enter the appropriate outcome as per step 9 above. The document will be listed within the associated documents list at the bottom of the screen.



Document	Author	Date Created	Last Action By	Date Modified	WIP	
NAT PSR Pilot Oral Screening Tool_20112021_162548_ops_d_E228205.doc	Karen Baker	20/11/2021	Karen Baker	20/11/2021	N	<a href="#">view</a>

NEXT APPOINTMENT

Next Contact Date:

[Save](#) [Update](#) [Document](#) [Print](#) [Cancel](#)

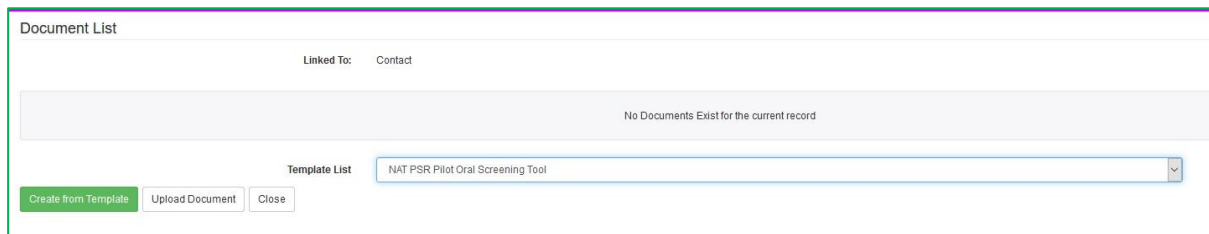
Figure 5 - Update Contact Details screen

17. Add any Notes where applicable
18. Save

## Uploading a completed screening tool to the contact

If the screening was completed outside of NDelius prior to the contact being added follow steps 1-13 above recording the output of the assessment as detailed in step 9.

19. Click 'Upload External Document' button



Document List

Linked To: Contact

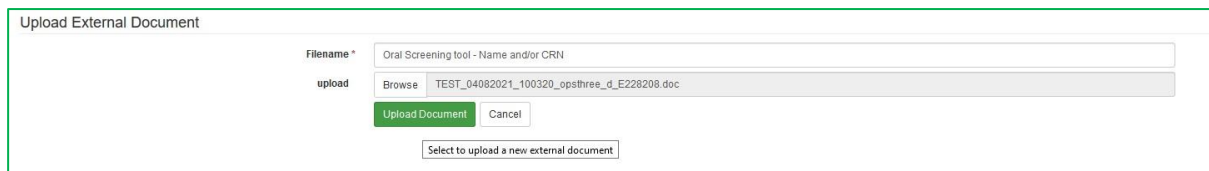
No Documents Exist for the current record

Template List: NAT PSR Pilot Oral Screening Tool

[Create from Template](#) [Upload Document](#) [Close](#)

Figure 6 - Document List screen

20. Enter a **unique file name**
21. Click **Browse** – this will open another window where you should navigate to the locate the screening tool as been save to. Add
22. Click 'Upload Document' button



Upload External Document

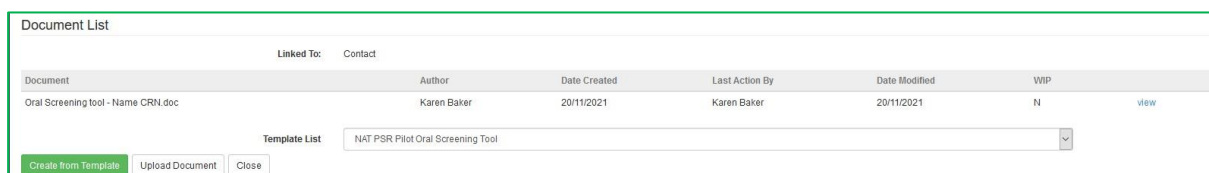
Filename: Oral Screening tool - Name and/or CRN

upload: [Browse](#) TEST\_04082021\_100320\_opsthrree\_d\_E228208.doc

[Upload Document](#) [Cancel](#)

[Select to upload a new external document](#)

Figure 7 - Upload External Document screen



Document	Author	Date Created	Last Action By	Date Modified	WIP	
Oral Screening tool - Name CRN.doc	Karen Baker	20/11/2021	Karen Baker	20/11/2021	N	<a href="#">view</a>

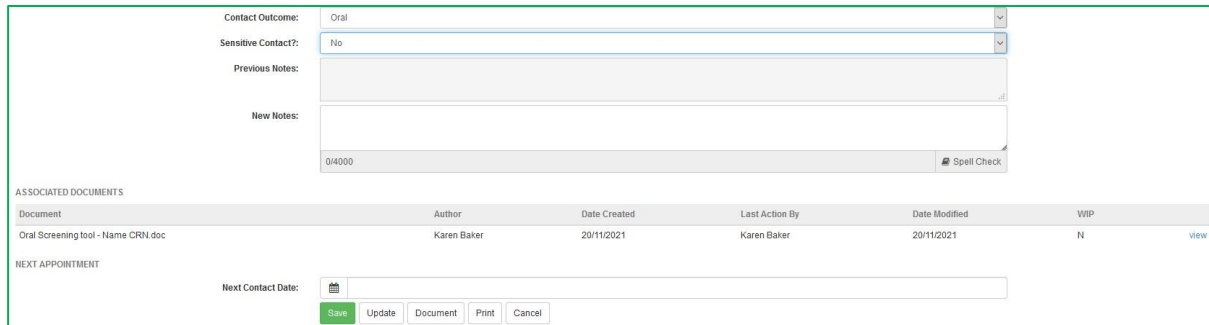
Template List: NAT PSR Pilot Oral Screening Tool

[Create from Template](#) [Upload Document](#) [Close](#)

Figure 8 - Document List screen

Document will be displayed as per figure 6, click 'Close' button

### 23. Enter Notes where applicable and Save



Contact Outcome: Oral  
 Sensitive Contact?: No  
 Previous Notes:  
 New Notes:  
 014000 Spell Check

Document	Author	Date Created	Last Action By	Date Modified	VIP	
Oral Screening tool - Name CRN.doc	Karen Baker	20/11/2021	Karen Baker	20/11/2021	N	<a href="#">view</a>

NEXT APPOINTMENT  
 Next Contact Date:   
 Save Update Document Print Cancel

Figure 9 - Update Contact Details screen

Once the contact has been saved and the screening tool has been uploaded that is the end of the process and courts should action the relevant Court Report as normal.

## Contacts

For queries relating to the process described in this Advice Note please contact:  
**[NDeliusqueries@justice.gov.uk](mailto:NDeliusqueries@justice.gov.uk)**