

Advice, Referrals and Case Management (ARC) system

User Manual

August 2019





This manual provides the user with information on how to access and use the Advice, Referrals and Case Management system for Assessment and Service Connect services.

DISCLAIMER

This User Manual reflects the functionality of the system as at August 2019. As enhancements and updates are made to the Advice, Referrals and Case Management (ARC) system, the content of screens and functionality may differ from that represented in this document.

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1 About ARC

Advice, Referrals and Case Management (ARC) is the system developed for Assessment and Service Connect (ASC) services to undertake an ASC co-response following notification that a child may be in need of protection, with the ASC service provider enabling connections for a child and family to ongoing support. An ASC co-response is to determine if a child is in need of protection and provide children and families with the right service, at the right time, in the right place, to increase safety.

Throughout this manual, those data fields which are critical for reporting and evaluation purposes are marked with *.

To access ARC you will need:

- Internet connection
- Internet browser: Infoxchange supports the three most recent versions of Internet Explorer, as well as the latest stable versions of Chrome and Firefox.

1.1 Logging into ARC

- 1. Type the URL <u>https://srs-qld-families.infoxchangeapps.net.au</u> into the browser
- 2. Login using your unique username and password. For first time access, refer section Logging In for the first time.
 - You have 4 attempts to enter the correct username and password
 - On a 5th unsuccessful attempt you will be blocked from logging in for a period of 1 hour

The **News** section will keep you informed of updates with new features or help tips for hot topics.

Details of support options are listed in the **Need help using ARC**? Section.

supporting families			📀 Infoxchange
Advice Referrals and Case Management This database contains private and confidential information. Access to this information legislation. Only authorised persons should access this database. You should not give your username and password to any other person. Please keep y to this application is logged and is subject to regular audits.	i is subject to State privacy our password secret. All access	Login to you Username Password	Faccount Forgot your password? Sign in
About ARCC An external and Case Management (APC) is an oilline clerit management system diveloped in pattership with, and Inded by the Department of Child Safety, Youth and Youngon Safety Vio, Io support service delivery for Family and Child Connect, Intensive Family Support, Aboriginal and articles Family Mathematic Aboriginal and Torress That Handner Family Participation Program and Assessment and Sarvice Connect services in Queensland Child Connect Violation and activities of violation and Imalien Ranses to ARC is managed through Infexchange with DCSYW receiving reports containing performance and is reviewed by a small number of staff subject to tight controls and is destroyed after use.	News What's new for you - December news Got the low down on mer features and recent changes here SPECIAL ALERT : Referrals now attach to all Person record IMPORTANT NOTICE about Contact Report and group ac The Contact Report . standard SRS Ineport. deen not accurr Group Notes or Activity Records. Adjustments are required to using this report Shead more . Any or up-to-date with - Mastring the Cases Page- using the Associated Reco- Luing the Groups Instance - for IFS services and for A - Understanding your Report providing insights for mu- streamling reportments . • for FACL and IFS services - for ALTSI Family Welbeing services - For your reference: - For Core Organn Cuidedines - ASTSI Family Welbeing Program Cuidedines	sl tivities Hey raflect worker time recorded via records recorder worker time ards feature ATSI Family Weltbeing services anaging your service and	Need help using ARCC? Detailed how to guidance is available in the User Manual. Simply click here to access: . • User Manual for FAIS • User Manual for ARIS Franky Weltbeing . • User Manual for ARIS Franky Weltbeing . • User Manual for ARIS Franky Participation Program. If you experience any problems with ARC, please contact Infoxchange Helpline on 1300 366 516 or (30) 5418 7487 or email son-support@infoxchange.org. Tyou contact the Helpline, please quote the web address you use the access ARC and the westgroup op use helpline. Jease quote the web address you use the access ARC and the westgroup op use helpline. Jease quote the web address you use the access ARC and the westgroup op use helpline. Jease guote the web address you use the access ARC and the westgroup op use helpline. The access ARC and the westgroup op use helpline. Jease Segont for practice related quories is available from Supporting Families and Family and Child Connect. For any queries relating to practice matters, please email faccand/issupport@csaye qdd gov au or ATIStfamiliee@csaye.gdd gov au

1.2 Logging in for the first time

When you log in for the first time, you will be asked to change your password. We recommend that you change your password to something easy to remember.

- Username must be unique within ARC. Recommend Firstname.Surname (e.g. John.Dough)
- Passwords needs to be a minimum of 10 characters, contain 1 upper case letter, 1 lower case letter, 1 numeric character and 1 special character.

Do not write down your password.

When logging in the first time, you will also be asked to update your security questions and email address, this will help identify you within the system and allow you to reset your password if required. You will be prompted to update these preferences each time you login until you complete these items. Refer to <u>User Preferences</u> for an outline of the security preferences available.

1.3 Navigating ARC



Once you have logged into ARC, the Home page displays as the default view.

Each screen within ARC comprises 3 areas :

- Pages 7 options on the left-hand side
- Tabs appear across the top for each Page
- Workspace area the central area.

Pages are grouped according to theme :

Home page:	Range of worker tools + Enquiry form
Persons page:	Search for clients and manage client records
Days page:	Enter or view data related to a particular day/date
Cases page:	View and access Case Summaries
Reports page:	Define and run various reports
Admin page:	User preferences, documents and coordinator functions
en han weidelinde Tales	Take allow the community and continuing functions with in the colority of

Each Page has multiple Tabs. Tabs allow the user to carry out particular functions within the selected Page.

The diagram below is a useful reference for understanding the process (start to finish) for using ARC in receiving referrals and undertaking an ASC co-response.



1.4 Viewing Prior Records

Data in ARC should not be deleted unless it was incorrectly entered. If information is no longer current or work has been completed, record an 'end date' / completed date. This will close the record, 'file it' as **View Prior**. Then, simply create a new record to reflect the current / new data or activity.

This **View Prior** feature occurs throughout ARC - the screenshots below provide an example of how it appears.

In Screenshot 1, you can see the **View Prior** button appears against *Cases / Case Summary* : this indicates that this Person does not have a current Case Summary, but does have a previous Case/s.

To view the previous records, simply click the **View Prior** button – the 'closed' records will display, as shown in Screenshot 2.

To hide the closed records, simply click the **View Prior** button again.

Screenshot 1



Screenshot 2



1.5 Toggle for access to Person records

On the left-hand side of your screen, underneath the Pages, there are 3 toggle options to display recent Person records :

- Recent List : displays the 10 most recent Person records you have accessed
- My List : displays the Persons for which you are listed as a Key Worker
- **Team Managed** : displays the Persons where *Team Managed* has been selected as Key Worker.

Simply ...

- click the toggle icon $\stackrel{\frown}{\sim}$ to select your required display
- click on the blue name to open that Person record
- click the box to expand or hide records.



1.6 Logging off

Log off via the log out icon icon on the top at the far right of the screen. Simply click to log out. Users should log out as soon as they have completed their work within ARC.

supporting families	ASC Training 2 Beverley Ba	anana Female, DO	B: 21/04/19	985 (Age 33 yrs)			A Coordinator (Coordinator)
Home	Search Details						\smile
Persons	Person / Alias:			Create new alias	Edit Primary D	etails	B O
Days	Name	Primary/Ali	as	Comments	Later many b		
Cases	Beverley Banana	Primary Name	9		Given Name	Beverley	
Reports	Relationships:			Create new relationship	Middle Name		
Admin	Person	Relationship	DOB	Comments	Family Name	Banana	
	Brian Banana	Husband	02/02/1983	3	**	O Mala @ Famala	

1.7 Access to more than one workgroup

In ARC, each service is set-up as a separate workgroup. In some areas, where staff work across a number of services, access is required for more than one workgroup. Each User only has one log in to ARC.

Simply click the **Change Workgroup** icon, as shown below, in the top right of your screen to select the workgroup you require.

supporting families	ASC Training 2 Advice, Referral and Case Management (ARC)	Coordinator (Coordinator)
Home	My List Team List My Actions Team Actions Referrals	Change Menu
Persons	Open Between: Start date 09/05/2018 📰 End date 09/05/2018 📰 Hide Team Managed: 🗋 Profile Status: Please select 💟 👩	workgroup
Days	My List (A Coordinator)	
Cases	No matches to your criteria.	
Reports		
Admin		

The workgroup options you have available will display. Simply select the radio button for the required workgroup and click OK.

My Workgroups	×
Select to change to another workgroup	
 ASC Training 2 FaCC Training 2 FW Training 2 IFS Training 2 	
Show this window after every login	ОК

Tick the checkbox on this screen to display your workgroups options on each log in. If not checked, you will be logged in to the workgroup you last exited. Access to your other workgroups is available via the **Change Workgroup** icon.

1.8 Concurrent edit warning

Should two workers be concurrently editing / updating a record, the following message will appear:

This record has been updated by another user while you were editing it.
Updated by on 16/02/2016 09:40:31.661835 AEST
Please choose one of the following action to proceed:
 Apply my changes anyway (the other user's changes will be overwritten)
 Discard my changes and redisplay (load changes made by the other user)
Continue

Select the required option and **Continue**.

1.9 Forgotten password

After you have logged in for the first time and have completed your Preferences (on the Admin page), the 'Forgot your password?' link on the landing page can be of great help.

If you haven't set up your User Preferences, you will need to contact an ARC Coordinator within your service or call the Infoxchange Support Team to reset your password.

1. Click **Forgot your password** in the log-in section on the ARC landing page.

Login to y	our account
Login to ye	
Username	I
Password	
[Forgot your password?
	Sign in

2. Enter your username and the email address registered with your user profile and select **Submit Step 1**

sup) far	porting nilies	🔿 In	ıfo <mark>x</mark> change
To r	eset your pas	sword you have to follow 3 simple steps.	
Ste Ent At t	p 1 of 3 - Please fill the er your username and the ne completion of Step 1	form below er egistered email address recorded in your SRS/SHIP user preferences. a reset key will be sent to your registered email address.	
	Username	firstname.lastname	
	Email address	adrian@email.com	
		Submit Step 1 Cancel	

An email containing a reset key is sent to the registered email address.

 Copy the reset key from your email and paste it into the Reset Key field, answer the security question and select Submit Step 2, as shown below

otep 2 of 0 - f lease fill the	form below
An email was sent to you wi program.	th your reset key. If you do not receive the email, check the junk / spam folder in your email
Enter the reset key in the fo you entered in your user pre	rm below and enter your response to the security question. This must match the response ferences.
Note: If there is no security password reset function. Ple	question below you have not completed your preferences and will not be able to use this aase contact your administrator or contact SRS Support.
Reset Key	1304bb16ac
Security Question	What are the last five(5) characters of my drivers license?

4. Enter your **new** username and password

Note: Your password must:

- be at least 8 characters long
- contain 1 upper case letter
- 1 lower case letter
- 1 number
- be different to your current password.

Select Submit Step 3

Step 3 of 3 - Enter your new	r password	
Your reset key and security of Please select a secure passo	uestion have been validated. You may now reset your password, word. You should not disclose your password to other people.	
Passwords need to comply - Must contain at least 8 chain - Must contain at least 1 upp - It cannot be the same as you	with the following rules: acters. r-case letter, 1 lower-case letter and 1 number. ur current password.	
New password	•••••••	

5. Select Login Page and enter your new password.

families	Infoxchange
To reset your password you have to follow 3 simple steps.	

2 Home Page

2.1 My List

The My List tab is used to view the list of Persons you have been allocated as a Key Worker.

The **Cases/ Case Summary** to which you have been assigned as a *Case worker* is displayed on the **Cases** Page. (Simply use the Apply Filter button to refine the search for your Cases).

From the Home page, select the My List tab :

supporting families	ASC Training Advice, I	a 2 Referra	l and Ca	ise Manage	ement (ARC)			A Coordina	tor (Coordin	ator)
Home	My List Jean	m List My	Actions Te	am Actions Re	ferrals						Menu
Persons	Open Betwee	en Between: Start date 09/05/2018 📰 End date 09/05/2018 🔠 Hide Team Managed: 🗌 Profile Status: Please select 🔽 📷 🔮									
Days	My List (A Co	/ List (A Coordinator)									
Cases	Oliver News	To an Iba	Manhan	March Mandana	March Mandree	First	Mark Darrah	Number of	Time Class Lock	Guard	
Reports	t f	Name	Role	Started	Ended	Contact*	Contact*	Contacts*	Contact*	Plan	
Admin	Beverley	Banana		09/05/2018				0		No	
🗆 🔁 Recent List	1 to 1 of 1 results							x	ß		
Beverley Banana	* Includes all	recorded cor	ntacts with AS	C Training 2 (does i	not include file notes)						

The following options can be used to customise your view:

- Click the calendar icon and alter the Start date and End date to filter data by date.
- You can exclude those clients managed by the entire Workgroup by clicking the Hide Team Managed box.
- Profile Status (if used by your service) will be displayed if selected click Go.
- To sort the list of persons, click on the Given Name or Family Name blue column headings.
- Click Export List to export the data currently displayed to a Microsoft Excel spreadsheet.
- Clicking on the Person's name will open the Person record.

2.2 Team List

The **Team List** tab on the **Home** page is used to view the list of Persons allocated within your Workgroup –only able to be viewed by those with Coordinator access.

NOTE : The Case workers allocated to Cases /	Case Summary must be viewed from the Cases Page
--	---

supporting families	ASC Trainin Advice	^{ig 2} Referra	al and C	Case Ma	nagement	(ARC)				A Coordinate	or (Coordina	ator)
Home	My List Tea	am List M	y Actions									Menu
Persons	Open Betwee	en 09/05/20	18 📰 and	09/05/2018	Key Worker	Please sele V Sh	ow Last worke	r 🗌 Alerts 🗌 Prof	file Status Please :	select 🗸 Go		8
Days	Mv Team Lis	st (ASC Tra	inina 2)									
Cases												_
Reports	Key Worker †	Given Name	Family Name	Worker Role	Key Worker Started	Key Worker Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan	
Admin	A Coordinator	Beverley	Banana		09/05/2018				0		No	
🗆 🔁 Recent List	K User	Peter	Potato		09/05/2018				0		No	
Peter Potato Beverley Banana		1 to 2 of 2 results									x	B
	* Includes a	II recorded co	ontacts with A	ASC Training 2	does not include	e file notes).						

The following options can be used to customise your view:

- By clicking the calendar icon and altering the displayed date range you can filter data by date.
- You can show additional details such as Last Worker, existing Alerts and Profile Status by clicking the options at the top of the form.
- To sort the list of Persons, click on the **Worker Name**, **Given Name** or **Family Name** blue column headings.
- Click **Export List** to export the data currently displayed to a Microsoft Excel spreadsheet.
- Clicking on the Person's name will open the Person record.

2.3 My Actions

The **My Actions** tab provides a quick way for you to check on any tasks, alerts, plans, document reviews and any other actions that have been allocated to you. From the **Home** page, select the **My Actions** tab.

My Actions lists all of your actions and tasks that are due shortly or those that are overdue. Overdue tasks are highlighted with a pink background.

supporting families	ASC Training 2 Advice, Referral	ASC Training 2 A Coordinator (Coordinator) Advice, Referral and Case Management (ARC)										
Home	My List Team List My	Actions Team /	Actions Ref									
Persons	Due Date Between: Start d	late 14/03/2018	End date 0	6/06/2018 📰 Go			Calendar View ?					
Days	My Tasks											
Cases	Due Date I	Time A	Action Type	Workgroup	Person	Description	Details					
Reports	21/05/2018	т	ask	ASC Training 2	Peter Potato	Internal Case review	Go to Task					
Admin	15/05/2018	т	ask	ASC Training 2	Beverley Banana	Contact CSO for details	Go to Task					
🗆 🔁 Recent List	Mark Complete											
Peter Potato Beverley Banana		1 to 2 of 2 results										
	NOTE: This list shows all ac logged on). To view the det	tions you are responsion tails of these action	onsible for. Thi ns you will need	s may include actions associ I to change to that workgrou	ated with your work for anot Ip.	ner workgroup (other than the one fo	r which you are currently					

The following options can be used to customise your view:

- By default, the system displays actions that are due in the next four weeks or were due in the past six weeks that are yet to be completed or closed. To alter the period you are viewing, enter dates into the Start date and/or End date fields, or use the calendar icon to specify a period. Click **Go**.
- To sort the list of tasks, click on the Due Date or Action Type blue column headings.
- Clicking on the Person's name will open the Person record.
- **Go to Task** directs you to the individual action.

2.4 Team Actions

The **Team Actions** tab is used to view the list of actions within your Workgroup – viewed only by users with Coordinator access.

From the **Home** page, select the **Team Actions** tab.

supporting families	ASC Training 2 Advice, Rei	Advice, Referral and Case Management (ARC)								
Home	My List Team Li		Team Actions	leferrals						
Persons	Due Date Betwee	n: Start date	.4/03/2018 End o	date 06/06/2018 🔳 G	o		Calendar View 😯			
Days	My Team Tasks				-					
Cases	Due Date I	Time	Action Type	Worker	Person	Description	Details			
Reports	21/05/2018		Task	K User	Peter Potato	Internal Case review	Go to Task			
Admin				A Coordinator						
	15/05/2018		Task	A Coordinator	Beverley Banana	Contact CSO for details	Go to Task			
C Recent List Peter Potato Beverley Banana					1 to 2 of 2 results					

The same features for navigating and customising My Actions can be applied to this tab.

3 Person Details

3.1 Searching for a Person

To maintain the accuracy of your data by ensuring duplicate records for Persons are not created, you can only add new Person records after you have completed a search.

There are 2 ways you can search for a Person :

- 1. via the **Persons** page, using the **Search** tab; or
- 2. using the **Family name** search box on the bottom left of the screen.



A quick way to access existing Person records you have recently accessed is to select them from your Recent List on the lefthand side of your screen.

Fuzzy searching allows you to search for clients with names that are a close match, or sound similar, to the one you typed. It is highly recommended to always do Fuzzy searching (leave it ticked).

The system is capable of **wildcard searching**. The % character can be used as a substitute for characters in a search, which greatly increases efficiency and flexibility, and mitigates against the inadvertent creation of a duplicate Person record. Establishing this habit is strongly encouraged. For example:

%son in the Family name field will return a list of all persons whose Surname ends in 'son'

K% in the Given name field will return all Persons whose name starts with K

A% in the *Given name* field and J% in the *Family Name* field will return all Person records starting with A and S respectively.

supporting	ASC Training 1	Training 1 vice, Referral and Case Management (ARC)						
Home	Search		inagement (AICC)				Menu
Persons	Search By:	lame○ Identifier○ Address () Phone () DOB					0
Days						et		
Cases	Given name A%	Family name	0%		Llear			
Reports	Search Results							
Admin	Given Name	Family Name	Sex	DOB	Alias?	Match †		
	Alexis	Jenkins	Female	01/01/1978		11		
Bella Banana	Annabelle	Jackson	Female	04/06/1983		14		

3.2 Add a Person

1. On the **Persons** page, **Search** tab, enter the criteria for the person you are searching for. Click **Search**. For this example, the *Family name* is Carrot.



As there were no records found, 'No matches to your search' message will be displayed.

- 2. Click Add new Person to create a record.
- 3. The Add New Person form is displayed.

Complete as much information as possible.

Sex and Indigenous status are mandatory fields (*).

If the exact date of birth is unknown, select a year only and tick the **year estimated** checkbox.

Add New Person	B 0
Given Name	Carissa
Middle Name	
Family Name	Carrot
*Sex	○ Male Female Intersex Unknown
Date of Birth	21 4 1986
*Identifies as	O Aboriginal
	O Torres Strait Islander
	O Both
Identifies as	Australian South Sea Islander
Country of birth	
Preferred Language	
	Culturally and Linguistically Diverse
Comments	
Primary diagnosed disability	
Secondary diagnosed disability	
Person Identifier	
ICMS ID	
Date of Death	DD/MM/YYYY 🛍 (dd/mm/yyyy)
Last Updated	
	Save

For recording Indigenous status,

Unknown – the person does not know their Indigenous status *Unspecified* – the person does not wish to specify their Indigenous status.

- 4. Select the **Save** button or select the 🖹 icon in the top right of the form.
- 5. The **Person** record is created the **Details** tab is the default view.

supporting families	ASC Training 1 Carissa Carrot Female, D	DB: 21/04/1986 (Age 32 yrs)					A Coordinator (Coordinator)
Home	Search Details Notes Alerts	Referrals Plans Tasks Documents					
Persons	View Primary Details			Edit Brimany Dotaile			B 0
Days	Person / Alias:		Coate new alloc	Eure Frindry Decails	(matrix)		
Cases	Name	Primary/Alias	Comments	Given Name	Canssa		
Reports	Carissa Carrot	Primary Name		Middle Name			
Admin	Relationships:		Create new relationship	Family Name	Carrot		53
🖯 🕽 Recent List	No relationship exists			*Sex	⊖ Male	Inknown	
Carissa Carrot Thomas Tomato	Profiles:		Create new profile	Date of Birth	21 04 1986		
Bella Banana	No profiles exist				year estimated		
	No Cases exist		Create new Case	Tidautifias as			
	Address:		Create new address	-toenones as	Torres Strait Islander		
	No address exists				O Both		
	Phone & other contacts:		Create new econtact		Neither		
	No contacts exist				O Unknown		
	Key Workers:		Create new key worker		O Unspecified		
	This person has no assigned key worker	5		Identifies as	Australian South Sea Islander		
			Export Details Refresh	Country of birth			
				Professed Language			
				Preferred Language			
					Culturally and Linguistically Div	verse	
				Comments			
				Primary diagnosed disability		*	
				Secondary diagnosed disability		Y	
				Person Identifier	6375		
				1013 10	4		
Family name search				Date of Death	DD/MM/YYYYY	(dd/mm/yyyy)	
GO				Last Updated	A Coordinator, ASC Training 1 12/02/2019 10:58:07 AEST		

Person Identifier / Person ID :

The system-generated **Person Identifier** number can be found by hovering over the Person name on the **Details** tab, as shown below, <u>or</u> from the Edit Primary Details form, as shown above.

supporting families	ASC Tra Caris	iining 1 sa Ca	rrot Fe	emale, [DOB: 21/0	4/1986	(Age 3	2 yrs)
Home	Search	Details	Notes	Alerts	Referrals	Plans	Tasks	Docu
Persons	View	Primar	y Deta	ils				
Days	Person	/ Alias:				Cr	anto nouv	
Cases	ID:6375/6375	,	Driv	norv/Ali	20	Comm		allas
Reports	<u>Carissa C</u>	<u>arrot</u>	Prim	ary Name	as 9	comm	ients	
Admin	Relatio	nships:			C	Create ne	w relation	ship

The following sections step though completing the segments on the **Details** tab.

3.3 Create Alias

supporting	ASC Training 1		A Coordinator (Coordinator)					
families	Carissa Carrot Female, DOB: 2	21/04/1986 (Age 32 yrs)			\$	•		
Home	Search Details Notes Alerts Refer	rals Plans Tasks Docu						
Persons	View Primary Details		Add New Alia		Be	2		
Days	Person / Alias:	Create new alias	Add New Alla					
Cases	Name Primary/Alias	Comment	Given Name					
Reports	Carissa Carrot Primary Name	connents	Middle Name					
Admin	Relationships:	Create new relationship	Family Name					
🗆 📿 Recent List	No relationship exists		Preferred Name]				
Carissa Carrot Thomas Tomato	Profiles:	Create new profile	*Sex					
Bella Banana	No profiles exist		56, 0					
	Cases	Create new Case	Date of Birth	ld mm yyyy				
	No Cases exist] year estimated				
	Address:	Create new address	Comments					
	No address exists		comments					
	Phone & other contacts:	Create new econtact	Last Updated					
	No contacts exist		c.	21/0				
Family name search	Key Workers:	Create new key worker	5	ave				
GO	This person has no assigned key workers							
		Export Details Refresh						

1. From the **Person** page, **Details** tab, select **Create new alias**.

- 2. Record relevant details in the Add New Alias form. Select Save.
- 3. To modify the Alias, click on the Alias name and the **Edit Alias Details** form will display on the right hand side.
- 4. Update the details and select **Save.**

ASC Training 1		A C	oordinator (Coor	dinat Ö	tor)
Search Details Notes Alerts Referrals Plans Tasks Documents				÷.	Menu
View Primary Details	Edit Alias Details		e	0	
Derson / Alias:	Luic Anda Decuna				
Create new alias	Given Name	Carrie			
Name Primary/Alias Comments Carissa Carrol Drimary Name	Middle Name				
Carrie Bas (Preferred) Whilst Carissa is her legal name, Carrie is to be used for all interactions.	Family Name				
Relationships: No relationship exists	Preferred Name	V			
Profiles: Create new profile	*Sex	○ Male ● Female ○ Intersex ○ Unknown			
No profiles exist	Date of Birth	dd mm yyyy			
Cases Create new Case		year estimated			
No Cases exist					
Address: Create new address	Comments	Whilst Carissa is her legal name, Carrie is to be used for	all	2	
No address exists		Initer actions.		1	
Phone & other contacts: Create new econtact	Last Updated	A Coordinator, ASC Training 1 12/02/2019 11:14:17 AEST			
	ASC Training 1 CarlisSa Carrot Female, DOB: 21/04/1986 (Age 32 yrs) Search Details Notes Alerts Referrais Plans Tasks Documents View Primary Details Person / Alias: Create new alias Name Primary/Alias Comments Carrise Carrot Imary Name Carrie Das (Preferred) Whilst Carissa is her legal name, Carrie is to be used for all interactions. Relationships: Create new relationship No relationship exists Profiles: No profiles exist Cases exist Address: Create new address No address exists Phone & other contacts: Create new contact	ASC Training 1 CarlisSa CATTOT Female, DOB: 21/04/1986 (Age 32 yrs) Search Details Notes Alerts Referrais Plans Tasks Documents View Primary Details Person / Alias: Create new alias Primary/Alias Comments Carries Carrot Imary Name Carrie Dass (Preferred) Whilst Carissa is her legal name, Carrie is to be used for all interactions. Relationships: No relationship exists Profiles: No profiles exist Create new profile No profiles exists Create new profile No address exists Phone & other contacts: Create new econtact	ASC Training 1 AC CarlSSa Carrot Female, DOB: 21/04/1986 (Age 32 yrs) Search Details Notes Alerts Referrals Plans Tasks Documents View Primary Details Person / Alias: Create new allas Relationships: Re	ASC Training 1 A Coordinator (Coor CarlisSa Carrot Female, DOB: 21/04/1986 (Age 32 yrs) Search Details Notes Alerts Referrals Plans Tasks Documents View Primary Details Person / Alias: Create new alias Name Carrie As (Preferred) Whilst Carissa is her legal name, Carrie is to be used for all interactions. Relationships: Create new relationship No relationship exists Profiles exist Cases exist Address: Create new address No address exists Phone & other contacts: Create new address	ASC Training 1 Carlissa Carrot Female, DOB: 21/04/1986 (Age 32 yrs) Search Details Notes Alerts Referrals Plans Tasks Documents View Primary Details Person / Alias: Primary/Nias Comments Carrie Carrie Carrie Carrie Carrie Carrie Carrie Carrie Carrie Create new relationship No relationship exists Profiles: No relationship exists Create new relationship No address exists Address: No address exists Phone & other contacts: Create new eddress Carrie Coordinate Comments Carrie Carrie III Carrie IIII Carrie IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII

When you search for **Car%**, both names will display – for the one Person record.

supporting	ASC Training 1					A Coordinator (Coordinator)
families	Carissa Carro	t Female, DOB: 21/04	/1986 (Age 32 yr	s)		8	i 🗘 🕩
Home	Search Details No	otes Alerts Referrals	Plans Tasks Do	cuments			Menu
Persons	Search By: ●N	ame 🔿 Identifier 🔿 Address 🔿) Phone () DOB				0
Days						_	
Cases	Given name Car%	Family name		○ Male ○ Female ○ Intersex ○	Unknown 🗹 Fuzzy Search	Clear	
Reports	Search Results						
Admin	Given Name	Family Name	Sex	DOB	Alias?	Match †	
	Carrie		Female		Alias	3	
🗆 🔁 Recent List	Carissa	Carrot	Female	21/04/1986		4	
Carissa Carrot							

3.4 Create Relationships

1. From the **Person** page, **Details** tab, select **Create new relationship**.

and a state of								A Coordi
families	Carissa	a Carrot Fe	emale, DOB: 21/0	4/1986 (Age 3	2 yrs)			A Coordi
Home	Search D	etails lotes	Alerts Referrals	Plans Tasks	Documents			
Persons	View Pr	imary Deta	ils			Soorch for ro	lated persons	0
Days	Person /	Alias:			Create new aliac	Search for re		-
Cases		D.:	61		create new anas	Given name		
Departe	Name	Primary/Alias	Comments			Family name		
Reports	Carissa Carrot	Primary Name				Sev	Male Eemale Intersey	
Admin	Carrie	Alias (Preferred)) Whilst Carissa is her	legal name, Carrie	is to be used	Jex		
		(· · · · · · · · · · · · · · · · · · ·	for all interactions.	- y ,,				
E Carissa Carrot	Relations	hips:				Fuzzy	\checkmark	
Thomas Tomato	Relations			Create	new relationship		GoClear	
Bella Banana	No relations	hip exists						
	Profiles:			C	eate new profile	Results		

2. Search for the related person – enter details (use of wildcard is recommended). Click **Go**. If no records are found, select **Add new person**.

supporting families	ASC Training 1 Carissa Carrot Female, DOB: 21/04/1986 (Age 32 yrs)	A Coordin
Home	Search <mark>Details</mark> Notes Alerts Referrals Plans Tasks Documents	
Persons	View Primary Details	0
Days	Percen / Alice	Ŭ
Cases	Create new alias Given name Char%	
	Name Primary/Alias Comments Family name Car%	
Reports	Carrisa Primary Name	
Admin	Carrie Alias (Preferred) Whilst Carissa is her legal name, Carrie is to be used for all interactions.	
Carissa Carrot	Relationships:	
Thomas Tomato	No relationship exists Go Clear	
Bella Banana	Profiles: Results	
	No profiles exist	
	Cases Create new Case Tip:If you are not sure about the spelling try using the symbol as a wildcard.	%
	No Cases exist For example, johns% would return both johnstone and joh	nnson.
	Address: Create new address	
	No address exists Add new person	
	Dhana & athan contractor	

3. Complete record as outlined in the preceding section <u>Add a Person</u>. Click **Save**.

4. The **Edit Relationship** form will display.

supporting families	ASC Trai Cariss	aining 1 Sa Carrot Female, DOB: 21/04/1986 (Age 32 yrs)	A Coordir
Home	Search	Details Notes Alerts Referrals Plans Tasks Documents	
Persons	View F	Primary Details	B 2
Days	Person	/ Alias: Contracting Related person Charles Carrot	
Cases	Name	Primary/Alias Comments is Carissa Carrot's	
Reports	Carissa	Primary Name Start Date 12/02/2019	
Admin	Carrot Carrie	Alias (Preferred) Whilst Carissa is her legal name, Carrie is to be used End Date dd/mm/yyy)	
Carissa Carrot	Relation	nships: Create new relationship	
Thomas Tomato Bella Banana	No relatio	onship exists Last update	
	Profiles	S: Create new profile Save	
	No profile:	es exist Print View	
	Casos		

5. From the drop-down list, select the required relationship type. In this example, Charles Carrot is Carissa Carrot's *Husband*. Select **Save**.

Note: the start date for a relationship defaults to today's date – this can be left as is or modified to reflect Date of Birth or it could be the start date of care (e.g. foster care).



6. The relationship is now shown on the Person's **Details** tab.



You can access Charles Carrot's **Person** record by clicking on his name. Carissa is displayed in the **Relationships** on his record. .

supporting families	ASC Training Charles (¹ Carrot м	1ale, DC)B: 02/	06/1982 (Age 36 y	yrs)
Home	Search Deta	ils Notes	Alerts	Referr	als Plans	Tasks	Documents
Persons	View Prim	ary Deta	ils				
Days	Person / Alia	as:					Create new alias
Cases	Name		Primarv	/Alias		Comme	ents
Reports	Charles Carrot		Primary N	Iame			
Admin	Relationship	s:				Create I	new relationship
🗆 🞜 Recent List	Person	Rel	ationshi	р	DOB	Co	omments
Charles Carrot	Carissa Carro	t Wife	•		21/04/1986	5	
Curissa Carrot	D (1					_	

If you click the relationship value (ie. Husband, Wife), the **Edit Relationship** screen opens if you need to edit / update.

Note : The **Person** record you have open is the name shown in the top section of your screen, above the tabs.

supporting families	ASC Training 1 Carissa Carrot Ferna	ile, DOB: 21/04/1986	6 (Age 32 yrs)		A Coordinator	(Coordin	nator	
Home	Search Details Notes Ale	erts Referrals Plans	Tasks Documents				Me	mu
Persons	View Primary Details			Edit Drimony	Dataila		2	
Days	Person / Alias:		(Edit Prinary	Decails			
Cases	News Drivery (Alies Co		Create new allas	Given Name	Carissa			
Reports	Carissa Primary/Allas Co	mments		Middle Name				
Admin	Carrot Carrie Alias (Preferred) Wh	ilst Carissa is her legal nar	me, Carrie is to be used	Family Name	Carrot			
Carissa Carrot	Relationships:	all interactions.	Create new relationship	*Sex	O Male Female O Intersex O Unknown			
Thomas Tomato Bella Banana	Person Relatio Charles Carrot <u>Husband</u>	nship DOB 02/06/1982	Comments	Date of Bitti	vear estimated			

3.5 Create Profile

The **Child Profile** is available.

The use of this Profile is entirely at the discretion of service providers – please refer to procedures required by your service.

supporting	ASC Training 1					A Coo	rdinator (Coo	dinate	or)
families	Crystal Carr	Ot Female, DOB: 1	17/02/2007	(Age 11 yrs)				¢	•
Home	Search Details	lotes Alerts Refe	rrals Plans	Tasks Documents				P	1enu
Persons	View Primary	Details			Create new profile	80			
	Person / Aliasi								
Cases	Person / Allas.			Create new alias	Child Profile				
	Name	Primary/Alias		Comments	create				
Reports	Crystal Carrot	Primary Name							
Admin	Relationships:			Create new relationship					
🗆 🞜 Recent List	Person	Relationship	DOB	Comments					
Crystal Carrot	Carissa Carrot	Mother	21/04/1986						
Charles Carrot	Profiles:			Create new profile					
Thomas Tomato Bella Banana	No profiles exist								

These records are <u>not</u> included in any departmental reporting.

	Child Profile	2 🖹 🕄	
٢	Education / Care Chi	ld Protection Issues	
	Behaviour		
	Parenting		
	Education		
	Health		
	Development		
	Development		
	*Start Date	12/02/2019	
	End Date		
	Last update		
		Save	1.

There are 3 sub-tabs available.

3.6 Record Address

Multiple current addresses (such as home, postal or respite) can be recorded for a Person. However, at any one time, a Person can only have one Primary address.

A single address can be associated with multiple related persons.

1. Select **Create New Address.** The **New Address Details** form will appear to the right of screen.

supporting families	ASC Training 2 Carissa Ca	a rrot Female, DOE	3: 21/04/1	.986 (Age 32	2 yrs)				А	Coordinator (Coordi 📱 🕻	inato I	or) 🗭
Home	Search Details	Notes Alerts Re	ferrals Pla	ans Tasks	Documer	nts							
Persons	Person / Alias	5:		Create n	ew alias	New Addre	ss Detai	ls:		P 🛛			
Days	Name	Primary/Alias		Comments		Ctr	pot						
Cases	Carissa Carrot	Primary Name				30							
Reports	Carrie	Alias (Preferred)											
Admin	Relationships		C	Create new rela	tionship	Subi	urb						
	Person	Relationship	DOB	Comme	nts	St	ate QLD 🗸	·					
Carissa Carrot	Charles Carrot Crystal Carrot	Husband Daughter	02/06/1982	2 7		Postco	de						
Crystal Carrot Charles Carrot	Profiles:			Croata po	u profilo	Coun	try Australi	a					
Beverley Banana Peter Potato	No profiles exist			Create net	wprome	Comme	nts						
	Cases			Create n	ew Case	Cafaby Jac							
	No Cases exist					Salety Isst	ies 🗌						
	Address:	C	Create ne	w address 🗾	w Prior	Address ty	Home	~					
	No current addres	sses exist				Primary Addres	ss? ● Yes () No					
	Phone & othe	r contacts:		Create new e	econtact	Current Addre	ss? • Yes) No					
	No contacts exist					Others who liv	e at this ad	dress(tick):					
	Key Workers:			Create new key	y worker	Person	Relations	nip Current Address	Address Type	Primary Address			
	This person has r	o assigned key workers				Charles Carrot	Husband						
			E	xport Details	Refresh	Crystal Carrot	Daughter						
						Last upd	ate						
							Save						

- 2. Record the address, including **Street**, **Suburb** and **Postcode**.
- 3. Select the **Address type**.
- 4. Update the **Primary** and **Current** address status (Yes/No) as relevant for that Address type.
- 5. The address can be recorded, where relevant, to related persons by ticking the checkbox, in the **Others who live at this address** box.
- 6. Select **Save.** The **Primary** address is indicated by the green tick.

supporting families	ASC Training 2 Carissa Carrot Female, DOB: 21/04/1986 (Age 32 y	A Coordinator (rrs)
Home	Search Details Notes Alerts Referrals Plans Tasks D	ocuments
Persons	Person / Alias:	alias Edit Address Details:
Days	Name Primary/Alias Comments	
Cases	Carissa Carrot Primary Name	12 First Avenue
Reports	Relationships:	Suburb CHARLEVILLE
Admin	Person Pelationship DOB Comment	
Carissa Carrot	Charles Carrot Husband 02/06/1982 Crystal Carrot Daughter 17/02/2007	Postcode 4470
Crystal Carrot Charles Carrot Beverley Banana Peter Potato	Profiles: Create new p No profiles exist	rofile Country Australia Comments
	Cases Create new No Cases exist	Case Safety Issues
	Address: Create new ad Street Locality Type Comments Last	dress Home Primary Address? • Yes
	v 12 First CHARLEVILLE OLD Home 09/05/20	Current Address? Ves No
	Avenue 4470	Others who live at this address(tick):
	Phone & other contacts: Create new eco	Address Type Address
	No contacts exist	Charles Carrot Husband Home
	Key Workers: Create new key w This person has no assigned key workers Create new key w	orker Crystal Carrot Daughter 🗹 Home 🗹
	Export Details Re	Last update A Coordinator 09/05/2018 15:35:30 AEST Save

To edit the address, select the address blue text - the Edit Address Details page will open.
To view address in Google maps, select the *icon*.

Additional Notes:

- When you start typing the Suburb, a list of possible options will appear.
- When you select the **State**, the **Postcode** will be populated automatically, assuming the **Suburb** is recognised. In the case where a suburb has multiple postcodes, the post code will need to be manually entered.
- When a **Primary Address** has been recorded (it displays with a green tick beside it) and you click on **Create new address** to record additional address types, a warning will show on the New Address Details form, as below.

New Addre	ess Details:			
Another addre Please confirm	ss is currently re 1 whether or not	gistered as this is the r	the primar iew primary	y address. y address.
Str	reet			
Sub	urb			
St	ate QLD 🗸			
Posto	ode			
Cour	ntry Australia			
Comme	ents			
Safety Iss Address t	ues 🗌 ype Home	 Image: A start of the start of		
Current Addre	ss? • Yes • No			
Others who liv	e at this addre	ss(tick):		
Person	Relationship	Current Address	Address Type	Primary Address
Charles Carrot	Husband			
Crystal Carrot	Daughter			
Last upd	late			

Simply record the required information, noting that this will not be the Primary Address for that Person. Click **Save**.

The **Details** tab will display as follows :

supporting families	ASC Training 2 Carissa Carrot Female, DOB: 21/	'04/1986 (Age 32 yrs)	A Coordinator (Co
Home	Search Details Notes Alerts Referral	s Plans Tasks Docume	ints
Persons	Person / Alias:	Create new alias	Edit Address Details:
Days	Name Primary/Alias	Comments	Street 7 Long Mile Bood
Cases	Carissa Carrot Primary Name		
Reports	Relationshins:		
Admin		Create new relationship	
🖯 🖸 Recent List	Charles Carrot Husband 02/0	6/1982	State QLD 💌
Carissa Carrot	Crystal Carrot Daughter 17/0	2/2007	Postcode 4470
Charles Carrot	Profiles:	Create new profile	Country Australia
Peter Potato	No profiles exist		Comments Carissa's mother place - most weekends
	Cases	Create new Case	Safety Issues
	No Cases exist		
	Address: Cre	ate new address View Prior	
	Street Locality Type Com	nents Last Update	Primary Address? () Tes () No
	✓ 12 First CHARLEVILLE Home	09/05/2018 💡	
	7 Long CHARLEVILLE Alternative Cariss	a's mother 09/05/2018 💡	Person Relationship Current Address Primary
	Mile Road QLD 4470 place weeke	- most ends	Address Type Address Charles Carrot Husband
	Phone & other contacts:	Create new econtact	Crystal Carrot Daughter
	No contacts exist		Last undate A Coordinator, ACC Training 2
	Key Workers:	Create new key worker	09/05/2018 15:44:29 AEST
	This person has no assigned key workers		Save
		Export Details Refresh	

3.7 Create Phone & other contacts

A Person can have multiple electronic contact records such as phone, email, fax and mobile. Other contacts such as an emergency contact or workers at external agencies can also be associated with the person record.

supporting families	ASC Training Carissa (2 Carrot Fer	nale, DOB	3: 21/04/1986	(Age 32 yrs)			A Coordinator (
Home	Search Deta	ils Notes	Alerts Re	ferrals Plans	Tasks Docume	nts		
Persons	Person / Ali	as:			Create new alias	Edit Contact	Details:	B 🛛
Days	Name	Prin	nary/Alias	Сог	nments	*Contact		
Cases	Carissa Carrot Carrie	Prim Alias	ary Name (Preferred)			*Contact type		
Reports	Relationship)S:		Creat	e new relationship	Safety Issues		
Admin	Person	Relatio	onship	DOB	Comments	Comments		
Carissa Carrot	Charles Carro Crystal Carro	t Husban t Daughte	d er	02/06/1982 17/02/2007		Start Date	09/05/2018	
Crystal Carrot Charles Carrot	Profiles:				Create new profile	End Date		
Beverley Banana Peter Potato	No profiles exis	t				Current econtact?	• Yes O No	
	Cases				Create new Case	Last update		
	No Cases exist						_	
	Address:			Create new ad	dress View Prior		Save	
	Street	Locality	Туре	Comments	Last Update			
	✓ 12 First C	HARLEVILLE	Home		09/05/2018 💡			
	7 Long C Mile Road C	CHARLEVILLE QLD 4470	Alternative	Carissa's mother place - most weekends	09/05/2018 💡			
	ses Carrisa Carrot Primary Name Carrie Alias (Preferred) min Relationships: Create new relationship Safety Issues min Person Relationship DOB Comments nt List tarrot arrot arrot arrot arrot arrot arrot Crystal Carrot Daughter 17/02/2007 Profiles: Create new profile Start Date 09/05/2018 No profiles exist Create new address View Prior Street Locality Type Comments Last Update Street Locality Type Comments Last Update Y 12 First CHARLEVILLE Avenue Alternative Carisa's mother OgLD 4470 09/05/2018 Save Phone & other contacts: Create new contact 09/05/2018 Save							
	No contacts exi	st						

1. Click **Create new econtact**. The **Edit Contact Details** form will appear on the right of screen.

- 2. In the **Contact** field, record the telephone number, email address etc.
- Select a Contact type from the drop down menu.
 Selecting *Emergency Contact* will display a yellow alert icon against that contact.
- 4. If there are safety issues regarding use of a contact, by ticking the *Safety Issues* box, an orange alert icon will show against that contact.
- 5. Add **Comments** as relevant and useful.
- 6. Enter the **Start Date** by using the calendar icon.
- 7. If this is the current contact for the client set **Current econtact?** to Yes.
- 8. Select Save.

To modify the Contact details, click on the Contact and the edit screen will display on the right hand side. Update the details and select **Save**.

To cease a contact, enter an end date and **Save**. This will display in the View Prior view.

Phone & oth	ner contacts	:	Create new	econtad	t View Prior
Contact	Туре		Comments		Last Update
4556 9887	Emerg Contae	ency ct	For Carissa's Mo Charlotte	ther -	09/05/2018
carissa@car	rot.com Email				09/05/2018
4552 1234	Phone	(Hm)	Don't leave mes	sages	09/05/2018
Prior contacts	;				
Contact	Туре	Com	ments	La	st Update
4556 8899	Phone (Hm)	Don't	leave messages	09/	05/2018

Additional Notes:

• A user with Coordinator access level is able to delete a Contact record.

3.8 Assign Key Workers

A Person can have one or more Key Workers associated with them. Key workers can be members of your service (workgroup) and/or people from external organisations assisting the family e.g. a doctor, a counsellor. <u>Note</u>: Persons external to your workgroup, recorded as Key Workers, do not have access to ARC - their name is simply entered for information purposes only. When you create a new Key Worker, you have the option to record useful comments about the role of the key worker and his or her responsibilities.

- 1. Select **Create new key worker.** The **Edit Key Worker** form will appear on the right of screen.
- Select the Key Worker from the drop down list.
 To record a key worker external to your service, select 'Other, please specify:' from the Key Worker list. Then enter their name, role and organization details.
- 3. Add **Role** and **Comments** as required.
- 4. In May be viewed by, select Workgroup.(In the current configuration of ARC, Workgroup and Cluster are one and the same.)
- 5. Enter the **Start Date** by using the calendar icon.
- 6. Set **Current Key Worker?** to Yes.
- 7. Select **Save**. To modify the details, click on the Key Worker name (in the Details tab) the edit screen will display on the right hand side. Update the details and select **Save**.

supporting families	ASC Trainin Carissa	g 2 Carrot _{Femal}	e, DOB: 21/04/1986	i (Age 32 yrs)			A Coord
Home	Search Det	ails Notes Aler	ts Referrals Plans	Tasks Documents			
Persons	Person / Al	lias:		Create new alias	Edit Key Wor	rker:	Bo
Days	Name	Prima	ry/Alias	Comments	Kay Warker		
Cases	Carissa Carrot	Primar	y Name		Key worker	Other, please specify:	
Reports	Carrie	Alias (Preferred)		Name	Trevor	
Admin	Relationshi	ps:		Create new relationship	Workgroup	CSSC	
	Person	Relation	ship DOB	Comments	Role	CSO	
Carissa Carrot	Charles Carr Crystal Carr	rot Husband ot Daughter	02/06/1982 17/02/2007	2	Comments	4556 9988	
Charles Carrot Beverley Banana	Profiles:	-		Create new profile	May be viewed by	○ Workgroup Cluster	
Peter Potato	No profiles exi	st			Start Date	09/05/2018	
	Cases			Create new Case	End Date		
		L			Current Key	● Yes ○ No	
	Addressi		Create	new address View Prior	worker?		
	Street	Locality	Type Comments	Last Update	Last update	09/05/2018 15:56:28 AEST	
	12 First Avenue	CHARLEVILLE OLD 4470	Home	09/05/2018 💡		Save Delete	
	7 Long Mile Road	CHARLEVILLE QLD 4470	Alternative Carissa's mot most weeken	her place - 09/05/2018 💡 ds			
	Phone & ot	her contacts:	Create	new econtact View Prior			
	Contact	Туре	Comments	Last Update			
	A 4556 9887	Emergency Contact	For Carissa's Mot Charlotte	her - 09/05/2018			
	carissa@ca	rrot.com Email		09/05/2018			
	4552 1234	Phone (Hm) Don't leave mess	ages 09/05/2018			
	Key Worke	rs:		Create new key worker			
	Worker	Workgroup	Role	Comments			
	B User	ASC Training 2	Support worker				
	Trevor	CSSC	CSO	4556 9988			
Family name search				Export Details Refresh			

To close a Key Worker, click on the record to open the Edit Key Worker form, then :

- (a) Select **No** for **Current Key Worker?**
- (b) Click **Save.** The **End Date** auto-populates to today's date upon Save.



TIP Key worker (allocated on Persons > Details tab) will display on the My List and Team List tabs on the Home Page.

Case worker (allocated on a Case Summary) displays on the **Cases** Page. Simply click on the **Show Filters** button to choose the worker you wish to display Cases for. You can use the other filter options to refine the displayed results.

Please refer to Section 4 for more information.

4 Cases / Case Summary

The ASC Case Summary represents the co-response referral from Child Safety.

A Person can only be associated with one active Case Summary at any one time.

Case Summaries can be created in two ways:

- from the **Persons** page RECOMMENDED outlined in Section 4.1 below
- from the **Cases** page outlined in Section 4.2 below.

4.1 Create a Case / Case Summary from Persons page

- 1. From the **Persons** page, **Details** tab, select the **Create new Case** button.
- Select ASC Case Summary from the Case type list. Click Create. The form will open in the right-hand side of your screen. Complete as outlined in Section 4.3 below

supporting families	ASC Training 1 Carissa Cal	rrot Female, DOB:	21/04/1986	(Age 32 yrs)		A Coord
Home	Search Details	Notes Alerts Refe	errals Plans	Tasks Documents		
Persons	Person / Alias:			Create new alias	Create new Case	B2
Days	Name	Primary/Alias		Comments	Case type	
Cases	Carissa Carrot	Primary Name			ASC Case Summary	
Reports	Relationshins:	Allas (Freieneu))		Si Suite	
Admin	Relationships.			Create new relationship		
	Person	Relationship	DOB	Comments		
Carissa Carrot	Charles Carrot	Husband	02/06/1982			
		Daughter	17/02/2007			
	Profiles:			Create new profile		
	No profiles exist					
	Cases			Create new Case		
	No Cases exist					
	Address:			Create new address		

4.2 Create Case / Case Summary from the Cases page

 From the Cases page, select the Create New ASC Case Summary button. The ASC Case Summary form will open in the right-hand side of your screen. Complete as outlined in Section 4.3 below – particularly Step 10, add Persons.

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)	A Coordi
Home	ASC Case Summary	
Persons	Records 20 Show Filters Create New ASC Case Summary & ASC Case Summary	8
Days	ASC Case List	
Cases	Case *I&A Event ID	
Reports	I&A Case Creation Family Suburb Closure Event ID Worker Date Summe of family Status ↓ Date ASC Referral Date	
Admin	22335566 A 12/04/2018 Mandarin ROMA Open Family Surname	
☐ 2 Recent List Margerie Mandarin Carissa Carrot	Coordinator 10 % 2010 Handauk Hork Copen 1 to 1 of 1 results I 2010 Primary Household Suburb Postcode	
	*Case Worker A Coordinator	
	*Case Start Date 10/05/2018	
	Response to ASC Please select	~
	Status Open [\checkmark
	Child Safety Priority Please select	~
	Documents Please save before attaching any documents.	
	Lock after	
	Last update Save	

4.3 Complete ASC Case Summary details

The ASC Case Summary comprises 4 sub-tabs :

- Summary : captures mandatory data about the referral
- Presenting Concerns : as reported by the referrer
- Initial Family Contact : captures the response required / from the family
- *Closure* : captures mandatory data upon completion of your work with the family.

The mandatory fields on each sub-tab are marked with an asterisk * .

• ASC Case S	Summary 🖪 🕑
Summary Presenting	Concerns Initial Family Contact Closure
*I&A Event ID	
ASC Referral Date	
*Family Surname	
Primary Household Suburb	
Postcode	
*Case Worker	A Coordinator
*Case Start Date	10/05/2018
Response to ASC referral	Please select
Status	Open 🗸
Child Safety Priority	Please select 🗸
Documents	Please save before attaching any documents.
Lock after	
Last update	Save

On the *Summary* sub-tab, there are 4 mandatory* fields to be completed in order to save / create the ASC Case Summary.

S ASC Case Summary ■ 2
Summary Presenting Concerns Initial Family Contact Closure
*I&A Event ID
ASC Referral Date
*Family Surname
Primary Household Suburb Postcode
*Case Worker A Coordinator
*Case Start Date 10/05/2018
Response to ASC Please select
Status Open
Child Safety Priority Please select
Documents Please save before attaching any documents.
Lock after 🔒
Last update Save

- 1. Complete the following fields :
- *I&A Event ID : the reference number on the referral received from Child Safety
- ASC Referral Date : the date the referral was received by your service
- *Family Surname : of the referred family
- Primary Household Suburb : of the referred family
- Postcode : this field will auto-populate based on the suburb entered
- *Case Worker : the worker assigned to leading the co-response for this referral
- *Case Start Date : is the date the ASC Case Summary is created this field auto-populates to todays' date (can be backdated).
- 2. Select Save.
- 3. You will be prompted to complete the **Presenting Concerns** sub-tab.

supporting families	ASC Training 1 Carissa Car	TOT Female, DO	B: 21/04/1986 (Age 32 yrs)				A Coord
Home	Search Details	Notes Alerts R	eferrals Plans	Tasks Documents				
Persons	Person / Alias:			Create new alias	ASC Case 5	Summary		80
Days	Name	Primary/Al	ias	Comments	Dancan	Polo Start Date	End Date	
Cases	Carissa Carrot	Primary Nam	e		Carican Carrot	10/05/2018	Ella Date	-
Reports	Carrie	Alias (Preferr	ed)			10/03/2018		
Admin	Relationships:			Create new relationship	Summary Presentin	g Concerns Initial Famil	y Contact Closu	re
	Person	Relationship	DOB	Comments	*I&A Event ID	12345678		
Carissa Carrot	Charles Carrot	Husband	02/06/1982		ASC Referral Date	09/05/2018		
Margerie Mandarin		Daughter	17/02/2007		*Family Surname	Carrot		
	Profiles:			Create new profile	Primary Household	CHARLEVILLE		
					Suburb	4470		
	Cases		Message	from webpage	X			
	No Cases exist				worker	A Coordinator	~	
	Address:			At least one Presenting Concern m	nust be entered t Date 10/05/2018			
	Street	Locality	Туре		to ASC	Please select		\checkmark
	V 12 First Avenue	CHARLEVILLE QLD 4	470 Home		OK Status	Onen		
	Phone & other	contacts:		Create new econtact		open		
	Contact	Туре	Comments	Last Update	Child Safety Priority	Please select		\checkmark
	4552 1234	Phone (Hm)	Don't leave messa	ges 10/05/2018	Documents	Select & Upload		
	carissa@carrot.	com Email		10/05/2018	There are	no files passaisted with	h this decumon	
	Key Workers:			Create new key worker	There are no files associated with this do To upload, click the upload button or in newer l			ers drag
	Worker	Workgroup	Role	Comments		and drop files her	e.	
	A Coordinator	ASC Training 1	Support worker					
				Export Details Refresh	Lock after			
					Last update	A Coordinator, ASC Tr 10/05/2018 12:03:49 Save Save Final	aining 1 AEST	
					Print View			

4. Click OK

3 ASC Case S	Summa	ry			
Person	Role S	tart Date	End [Date	+
Carissa Carrot	1	2/02/2019			ø
Summary Presenting	g Concerns	Initial Fami	ly Contact	Closure	
Child wellbeing Parenting Skill Domestic & Fa	s mily Violer itionships i	nce including co	nflict betw	veen	
Social and/or o	niia/ren community	support ne	twork		
Housing, food, resources	clothing, l	budgeting o	r basic ho	usehold	
Child Physical disability	health incl	uding healtl	n conditior	ıs,	
Parent/Carer p disability	hysical he	alth includir	ng health o	conditions	,
Child mental o depression or s	r emotiona self-harm	al health inc	luding anx	ciety,	
Parent/Carer n anxiety, depre	nental or e ssion or se	motional he lf-harm	ealth inclu	ding	
Child alcohol a	nd/or drug	j misuse			
Parent/Carer A	lcohol and	l/or drug mi	suse		
🖌 Child sexual at	ouse				
🗌 Family law / cu	ustody issu	ies			
Other					
Lock after					
Last update	A Coordin 12/02/20 Save	ator, ASC T 19 11:38:59 Gave Final	raining 1 9 AEST		

5. Complete the relevant check boxes and **Save**.

6. Attach the relevant **Persons** to the **Case Summary** by clicking the 主 icon at the top of the form.



This will open the Person Search and Select pop up box.
 Select the Search radio button, enter the client name in the white box, click Go.
 Note: If you Create new Case Summary from the Person page, Details tab, you can use the Related button to identify relevant family members participating in the Case.

Select Persons to attach to the ASC Case Summary by ticking their checkbox and click Save.



All relevant Persons are now attached to the ASC Case Summary.

• ASC Case S	Summ	ary		8
Person	Role	Start Date	End Date	+
Carissa Carrot		12/02/2019		e
Charles Carrot		12/02/2019		
Crystal Carrot		12/02/2019		
Summary Presenting	J Conceri	ns Initial Famil	y Contact Closure	
*I&A Event ID	12345	678		
ASC Referral Date	08/02/	/2019		
*Family Surname	Carrot			
Primary Household	CHARL	EVILLE		
Postcode	4470			
*Case Worker	A Coor	rdinator	\checkmark	
*Case Start Date	12/02/	/2019		

The Start Date reflected in the *Person* section defaults to today's date.
 It can be manually changed to align with the Case Creation Date (if this is set to a date other than today's date) by clicking on the crayon icon for each Person.

3 AS	SC Case S				
Perso	on	Role	Start Date	End Date	-
Cariss	a Carrot		12/02/2019		(1
	Edit a	associat	ion details		
Person	Carissa Carrot				
Role	Please select		\checkmark		
*Start Date	12/02/2019	Te			
End Date		TH			
Comments					
Last update	A Coordinator, 12/02/2019 1	, ASC T 1:38:30	raining 1) AEST		
	Save Delet	e Ca	ncel		

In the Edit association details form, select the **Role** for the Person from the drop-down list, select the Start Date using the calendar icon, and click **Save**.

The Person section will display as follows :

ASC Case Summary				
Person	Role	Start Date	End Date	+
Carissa Carrot	Primary Carer	12/02/2019		
Charles Carrot	Carer/parent	12/02/2019		
Crystal Carrot	Referred Child	12/02/2019		
Summary Prese	nting Concerns In	itial Family Cont	act Closure	

9. Complete the **Response to ASC Referral** field, in accordance with the procedures for your service.

ASC Case Summary				8
Person Ro	le	Start Date	End Date	+
Carissa Carrot Pri	mary Carer	12/02/2019		<i>"</i>
Charles Carrot Ca	rer/parent	12/02/2019		<i>"</i>
Crystal Carrot Re	ferred Child	12/02/2019		<i>"</i>
Summary Presenting	Concerns Ini	tial Family Conta	act Closure	
*I&A Event ID	12345678]		
ASC Referral Date	08/02/2019			
*Family Surname	Carrot			
Primary Household	CHARLEVILL	E		
Postcode	4470			
*Case Worker	A Coordinate	Dr	~	
*Case Start Date	12/02/2019	TH		_
Response to ASC referral Status	Please select Accepted Not Accepted	t d		

10. Complete the **Child Safety Priority** field, as advised on the received referral.

Child Safety Priority	Please select
,,	24 hour
Documents	5 day 10 day
	/

11. In accordance with the procedures of your service, relevant documents can be uploaded to

L	Select & Upload	
by clicking		•

• ASC Case S	ummary			80
Person Ro	le	Start Date	End Date	+
Carissa Carrot Pri	mary Carer	12/02/2019		<i>.</i>
Charles Carrot Ca	rer/parent	12/02/2019		_
Crystal Carrot Re	ferred Child	12/02/2019		<i>"</i>
Summary Presenting	Concerns Init	ial Family Conta	act Closure	
*I&A Event ID	12345678]		
ASC Referral Date	08/02/2019			
*Family Surname	Carrot			
Primary Household	CHARLEVILLE			
Postcode	4470			
*Case Worker	A Coordinato	r	\checkmark	
*Case Start Date	12/02/2019			
Response to ASC referral	Accepted			~
Status	Open			\checkmark
Child Safety Priority	5 day			~
Documents	Select & Upl	oad		
File Name	Uploa	ded		
Original referral.p	df 12/02/	2019 11:47:0	2 AEST	×
Lock after				
Last update A Coordinator, ASC Training 1				
Print View	Save Save	Final		

..as an example.

The *Summary* sub-tab of the *ASC Case Summary* is now complete.

12. The Initial Family Contact sub-tab is for capturing this response:



If Further family contact not required is selected, a *Reason* is required to be selected.

ASC Case Summary				8
Person	Role	Start Date	End Date	+
Carissa Carrot	Primary Carer	12/02/2019		<i>.</i>
Charles Carrot	Carer/parent	12/02/2019		
Crystal Carrot	Referred Child	12/02/2019		
Summary Prese	nting Concerns Ini	itial Family Cont	act Closure	
*Outcome from initial family contact *Deason further family contact is not required Lock after				
Last upd Print View	ate A Coordinato 12/02/2019 : Save Save	r, ASC Training 11:47:03 AEST e Final	1	

If a *Reason* of Other is selected, then a text box is provided to document that reason.


If Initial family consent received is selected, Date of consent and Who provided it are required to be recorded.

Summary Presenting	Concerns Initial Family Contact Closure
*Outcome from initial family contact	Initial family consent received
ate of family consent to engage	14/02/2019
(*)/ho provided consent to engage	Carissa and Charles
Lock after	
Last update .	A Coordinator, ASC Training 1 12/02/2019 11:47:03 AEST
	Save Save Final
Print View	

13. Record results as applicable, click **Save**.

4.4 Close an ASC Case Summary

The accurate closure of the ASC Case Summary is very important for evaluation and reporting purposes. Closing a Case Summary means you have finished working with the family.

Complete the following steps to close an ASC Case Summary :

- Open the ASC Case Summary by :
 a) selecting it from the Details tab (on the Persons page) or
 b) from the list displayed on the Cases page.
- 2. Open the **Closure** sub-tab.

Person	Role	Start Date	End Date	+
Charles Carrot	Carer/parent	10/04/2018		6
Crystal Carrot	Referred Child	10/04/2018		6
Carissa Carrot	Primary Carer	10/04/2018		6
Summary Pres	enting Concerns In	itial Family Cont	act Closure)
I&A Comple	etion	TI		
*C []	Date			
"Case End	Date			
*Case clo re	sure Please selec	:t	[~
Procedure Re Active Eng	st e view gagement procedu sent and uploaded	re followed (if appropriate	2)	
	ew for non-engage to close	d families		
Data Collecti Case note Relevant o Key worke	on s completed documents upload er ended ng tasks complete	ed d		
Lock	after 🔓			
Last up	date A Coordinato 10/05/2018 Save Sav	r, ASC Training 14:24:46 AEST e Final	1	

The options available here depend on the **Response to ASC referral** recorded on the **Summary** subtab.

- 3. If the Response is Accepted,
 - record the I&A Completion Date

- record the Case End Date

This updates the End Date for each Person in the Case Summary.

This **End Date** displays against the **Case Summary** on their **Persons** page, **Details** tab.

<u>NOTE</u> : If the End Date is changed after the initial Save, you will need to manually change the End Date (in the Person display at the top of the form) by clicking the red crayon.



- 4. You are prompted to respond to **Has all time spent on this case been recorded in Notes?*** A validation rule will not allow you to close the case if the response is No.
- 5. Select the appropriate ***Case closure reason** :



- 6. Complete the **Closure checklist** it is anticipated this will be integrated with practices established within your service.
- 7. Select Save.
- 8. If the *Response to ASC referral* (on the **Summary** sub-tab) is **Not Accepted**,
 - record the Case End Date
 - complete the * mandatory fields displayed.

Summary Prese	enting Concerns Initial Family Contact Closure
I&A Comple	tion
*Case End [Date 10/05/2018
This date wil	I be set as the end date for all persons currently associated with this document
*H)s all time spon this case b recorded in No	pent () Yes () No peen tes?
*Reason for	not Please select
*Rationale for	not Other
accep	ting

To promote data integrity, there are a number of validation messages which may appear :



The following tasks are also required to be completed upon Closure :

- Close Case Plan refer to the section <u>Close Plan</u>
- Close Key Worker refer to the section Close Key Worker

4.5 Managing Cases from the Cases Page

The **Cases** Page displays key information for managing and monitoring Cases within your service. There are a number of features which may enhance operational efficiencies.

supporting families	ASC Train	ning 1 , Refer	ral and	Case	Managem	nent	(ARC)	
Home	ASC Case	Summary						
Persons			Records 20	✓ Show	Filters Create	New ASC	C Case Summary	/
Days	ASC Case	List						
Cases	>		Case					
Reports	I&A Event ID	Case Worker	Creation Date	Family Surname	Suburb of family	Status ↓	Closure Date	
Admin	12345678	A	11/05/2018	Carrot	BURLEIGH	Open	:=	
🖯 🖸 Recent List		Coordinator	,,		HEADS			
Carissa Carrot Barry Beetroot	88997755	A Coordinator	13/04/2018	Mandarin	COOLANGATTA	Open	=	=
Margerie Mandarin	55668899	A Coordinator	04/04/2018	Beetroot	Kirra Beach	Closed	06/04/2018	=
			1	to 3 of 3 r	esults)

a) Order by column

The display of Cases can be actioned from each column – simply click the column to activate as the display, and click again to change the direction of the display.

supporting families	ASC Trainir Advice,	ASC Training 1 Advice, Referral and Case Management (ARC								
Home	ASC Case S	ummary								
Persons			Records 20	✓ Show	Filters Create	New AS	C Case Sumr	nary		
Days	ASC Case L	ist								
Cases			Case							
Reports	I&A C Event ID W	Case Vorker	Creation Date	Family Surname	Suburb of family	status ↓	Closure Date			
Admin	12345678 A C	oordinator	11/05/2018	Carrot	BURLEIGH HEADS	Open		i		
Carissa Carrot Barry Beetroot	88997755 A	oordinator	13/04/2018	Mandarin	COOLANGATTA	Open		≔		
Margerie Mandarin	55668899 A C	oordinator	04/04/2018	Beetroot	Kirra Beach	Closed	06/04/2018	3 🔳		
			1	to 3 of 3 r	esults		X			

b) Apply filters

Specific tailoring of displayed information can be achieved through the use of the **Show Filters** feature.

supporting families	ASC Train	ASC Training 1 Advice, Referral and Case Management (ARC)							
Home	ASC Case	Summary							
Persons			Records 20	✓ Show	Filters Create	New AS	C Case Sum	mary	
Days	ASC Case	e List							
Cases			Case						
Reports	I&A Event ID	Case Worker	Creation Date	Family Surname	Suburb of family	Status ↓	Closure Date		
Admin	12345678	A	11/05/2018	Carrot	BURLEIGH	Open		:=	
🗆 🔁 Recent List	12010070	Coordinator	11,00,2010	Guillot	HEADS	open			
Carissa Carrot Barry Beetroot Margerie Mandarin	88997755	A Coordinator	13/04/2018	Mandarin	COOLANGATTA	Open		æ	

Select your desired parameters for one or a number of columns, click **Apply Filters**.



supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)							
Home	ASC Case	Summary						
Persons		Apply Filte	ers Clear Filters	Hide Filter	s Create N	lew ASC Ca	ase Summary	
Days						Re	ecords 20 🗸	
Cases	ASC Case	e List						
Reports	I&A	Case	Case Creation	Family	Suburb of			
Admin	Event ID	Worker	Date	Surname	family	Status 🖡	Closure Date	
E Carissa Carrot		~	01/05/2018			~		
Barry Beetroot Margerie Mandarin	12345678	A Coordinator	11/05/2018	Carrot	BURLEIGH HEADS	Open		
			1	to 1 of 1 re	sults			

Clear Filters – will clear the previous values and enable you to tailor a new search. **Hide Filters** – returns you to the List view.

c) Create new ASC Case Summary

You can create a new ASC Case Summary directly from the Cases page.

Click Create New ASC Case Summary and the form will open on the right of the screen.

supporting families	ASC Training 1 Advice, Refe	rral and	Case	Managen	nent	(ARC)				A Coo
Home	ASC Case Summary					_				
Persons		Records 20	Show	Filter Create	New ASC	C Case Sur	nmary	• ASC Case	Summary	8
Days	ASC Case List			-				Summany Presentia	a Concerns Initial Family Contact Closure	
Cases		Case						*I&A Event II	S Concerns Innual Family Concact Closure	
Reports	I&A Case Event ID Worker	Creation Date	Family Surname	Suburb of family	Status ↓	Closure Date		ASC Referral Date		
Admin	12345678 A Coordinato	11/05/2018	Carrot	BURLEIGH HEADS	Open		æ	*Family Surnam		
E Carissa Carrot Barry Beetroot	88997755 A Coordinato	r 13/04/2018	Mandarin	COOLANGATTA	Open		≔	Primary Householo Suburi Postcodo		
Margene Manuarin	55668899 A Coordinato	04/04/2018	Beetroot	Kirra Beach	Closed	06/04/20	18 🧮	*Case Worke	A Coordinator	
		1	to 3 of 3 r	esults			зB	*Case Start Date	11/05/2018	
								Response to ASO referra	Please select	~
								Statu	5 Open	\checkmark
								Child Safety Priority	Please select	~
								Document	Please save before attaching any documents.	

Simply complete the 4 mandatory (*) data fields and click Save.





Click the

icon to attach the relevant Person records for this Case.

At the time of creating the **Case Summary**, dependent upon the procedures of your service, it may not be possible to allocate a **Case worker**. The **Case worker** field can be left blank by choosing the *Please select* value. When the Case is assigned, the field can be updated with the relevant worker.

*Case Worker	Please select	
	A Coordinator	
*Case Start Date	A User	
	B Coordinator	
Response to ASC	B User	
response to nee	C Coordinator	

d) View Associated Records

The icon on the right-hand side of the **Cases** Page opens a short-cut to display documents associated with the **ASC Case Summary**.

NOTE : Plans must still be accessed from the **Persons** page.

The individual records can be opened by clicking on the date link.

supporting families	ASC Training Advice,	_{g 1} Referr	al and	Case	Managem	nent	(ARC)						A Coordinator	(Coordi	nator) (
	ASC Case Su	ummary														Menu
Persons		F	Records 20	✓ Show	Filters Create	New ASC	C Case Su	mmary	As	sociati	ed Recor	ds				
Days	ASC Case Lis	st							4	1550	ciated	Reco	ords	Filter	reate Ne	w
Cases			Case						1							
Reports	I&A Ca: Event ID Wo	ise orker	Creation Date	Family Surname	Suburb of family	Status ↓	Closure Date			Date		Record	Туре	Notes	Acti	ons
Admin	12345678 A		11/05/2018	Carrot	BURLEIGH	Onen		(=		11/0	5/2018	Alert	Family violence	History of violence although	s	
🗆 🖸 Recent List	12545070 Co	ordinator	11,03,2010	Carrot	HEADS	open			0	11/0	5/2018	Note	Phone call	Contacted Bill from Aldo		
Peter Parsnip Carissa Carrot	88997755 A Co	ordinator	13/04/2018	Mandarin	COOLANGATTA	Open		≔	6	18/0	4/2018	Note	Home visit	Met with family		
Barry Beetroot Margerie Mandarin	88997755 A Co	ordinator	11/05/2018	Parsnip		Open		≔	đ	11/0	4/2018	Note	Planning (before consent)	Had a chat with Mary		
	55668899 A Cor	ordinator	04/04/2018	Beetroot	Kirra Beach	Closed	06/04/20	018 🧮					1 to 4 of 4 re	sults	x	A
			1	to 4 of 4 r	esults			24	Р	lans d	o not dis	play in	this table - you must vie	w / action these from the Per	sons pag	e.
									R	ererra	is must i	be actio	neu rrom tnë Persons pa	ge.		



Click on the Associated Records at the top of the screen to return to the list of Associated Records.

The button (on the list of Associated Records) shows the worker/s and any external people associated with the record.

Date	Record	Type	Notes	Action
11/05/20	018 Alert	Family violence	History of violence although s	
11/05/2	018 Note	Phone call	Contacted Bill from Aldo	
Worke Trevor A Cool	rs / Worl ; CSSC. [C rdinator, As	kgroups SO] SC Training 1 consent)	et with family	
		1 to 4 of	4 results	🖈 🖾

The display of records can ordered by clicking each column – with the arrow indicator appearing. Simply click again to reverse the order.

A	ssociated	d Rec	ords	Filter	Create New
	Date 1	Record	Туре	Notes	Actions
0	11/04/2018	Note	Planning (before consent)	Had a chat with Mary	
Ð	18/04/2018	Note	Home visit	Met with family	
Ð	11/05/2018	Note	Phone call	Contacted Bill from Aldo	
Ð	11/05/2018	Alert	Family violence	History of violence although) S
			1 to 4 of 4	results	🖈 🖍
Pla Re	ans do not di ferrals must	splay in be actio	this table - you must ned from the Persons	view / action these from the Pe page.	rsons page.

Associated Records ate New Associated Records (D Record: Note From: 02/04/2018 🛗 \checkmark Search Clear To: 26/04/2018 🛗 Date Record Type Notes Actions () 18/04/2018 Note Home visit Met with family 11/04/2018 Note Planning (before consent) Had a chat with Mary 1 to 2 of 2 results 🖹 🛃 Plans do not display in this table - you must view / action these from the Persons page. Referrals must be actioned from the Persons page.

The Filter button enables you to define the parameters of your search.

The Create New button enables you to select a record type to create a new record.

Ass	ociated Reco	rds			1	
Α	ssociated	d Rec	ords	Fil	er	Create New
						Note
	Date	Record	Туре	Notes		Alert
0	11/05/2018	Alert	Family violence	History of violence alt	hc	Document
0	11/05/2018	Note	Phone call	Contacted Bill from Al	do	
0	18/04/2018	Note	Home visit	Met with family		

The Persons attached to the **ASC Case Summary** are automatically included in each record. If the particular record only pertains to one Person, simply uncheck the box for the other Person/s listed.

This note is associated with (tick):	
Carissa Carrot	\checkmark
Crystal Carrot	\checkmark
Charles Carrot	\checkmark

5 Record Notes

Notes (located in the **Persons** page, **Notes** tab) are important for recording the activities undertaken with your families and capturing the associated time spent by the worker/s.

1. From the **Person** page, select the **Notes** tab.

2. Click **Create New Note**.

supporting families	ASC Training 1 Margerie Mandarin Female, DOB: 03/03/1983 (Age 35 yr:	A Coordinator (
Home	Search Details Notes Alerts Referrals Plans Tasks Document	
Persons	Notes Filter Create New Note	Edit Note Details
Days	No Notes to display	Activity Data 11/05/2018
Cases		
Reports		* Worker/s A Coordinator, ASC Training 1
Admin		* Direct/Indirect
		* Activity Type
🕀 🐱 Recent List		Case Summary 88997755
	N	Notes
		Consultation with DFV Consultation Cultural Consultation Disability Support Practice Consultation Other
		Michelle Mandarin Daughter
		Mark Mandarin Son
		* Activity Length Contact Case Work Travel mins
		May be edited to 14/05/2018
		Last update
Family name search		Save Save Final

There are 4 (*) mandatory fields required to save a Note.

- 3. **Activity Date** default's to today's date can be backdated to reflect actual date of the activity being recorded.
- 4. Add *** Worker/s**. The Worker will default to the user entering the data. Additional workers can be added by selecting the icon. External workers can also be added to the note to record their attendance. (Persons external to your service do not have access to ARC.)

Use the drop-down arrows to select, then Add, then Close.

	Edit Note Details	8] [Edit Note Details	8
	Activity Date 11/05/2018			Activity Date 11/05/2018	
	* Worker/s 📥 A Coordinator ASC Training 1 🗙 K User ASC Training 1 🗙			* Worker/s 着 A Coordinator ASC Training 1 🗙 Trevor Child Safety. [CSO] 🗙	
	Additional workers			Additional workers	
	Workgroup: ASC Training 1			Workgroup: External Organisation	
	Marken		Ш	Organisation: Child Safety	
	K User	~		Worker: Trevor	ן ו ר
N	Role:		Π	Role: CSO	i 🛛
	Add Close			Add Close	

5. Select the * Direct / Indirect



6. The * Activity Type values are dependent on whether Direct / Indirect was selected.

* Direct/Indirect	Direct activity	
* Activity Type		
Case Summary	Planning (after consent) Home visit Meeting	
Notes	Phone call Connection to supports File note Planning (before consent) Case consultation Provide specialist advice Correspondence Child Safety interaction Other	
	00101	

For **Direct activity**, * **Activity Types** available are :

For Indirect activity, * Activity Types available are :

* Direct/Indirect	Indirect activity 🔽	
* Activity Type		
Case Summary Notes	Planning (after consent) Home visit Meeting Phone call Connection to supports File note Planning (before consent) Case consultation Provide specialist advice Correspondence	
	Child Safety interaction Other	

How the **Activity Type** values display is dependent on your browser (the above reflects how they appear using Internet Explorer)– the light gray values showing in the above screenshots are not available to select.

- 6. The **Case Summary** field will display the open **ASC Case Summary** for this Person. This is auto-populated.
- 7. Record any relevant comments in the **Notes** box.

8. Click / 'tick' each box as relevant, if there has been consultation with other professionals in the conduct of this activity.

Consultation with	h 🗌 DFV Consultation
	Cultural Consultation
	Disability Support
	Practice Consultation
	Other

9. If the note is associated with other persons that are associated/related to the client, select the person (tick the box) from the **This note is also associated with** section.

This note is also associated with (tick):				
Michelle Mandarin	Daughter			
Mark Mandarin	Son	\checkmark		

Refer section Create Relationships for more information on creating relationships.

10. Enter the time spent on this activity in the **Activity Length*** field/s.

The definitions for each category of **Activity length *** are:

- *Contact*: direct time spent with the client
- *Case Work*: time spent on behalf of the client
- *Travel* : other travel undertaken with or on behalf of a client (including travel to meetings with clients, without them in the car)

Enter time **in minutes**.

- 11. Select **Save** to save a draft of the note all notes will automatically become locked/uneditable after 3 days of saving.
- 12. Select **Save Final** if you want to lock the note now.

Edit Note Detail	S	8				
Activity Date 11,						
* Worker/s <mark>ሬ</mark> A Co Trev	* Worker/s 📥 A Coordinator, ASC Training 1 🗙 Trevor, Child Safety [CSO] 🗙					
* Direct/Indirect Inc	direct activity 🔽					
* Activity Type Pla	anning (before consent) 🔽					
Case Summary 88	997755					
Notes		-				
Mandarin family. Consultation Consultation Cultural Consultation Disability Support Practice Consultation						
	Other					
This note is also asso Michelle Mandarin	Daughter					
Mark Mandarin	Son					
* Activity Length Co	ontact Case Work Travel	mins				
May be edited to 14/05/2018						
Last update A Coordinator, ASC Training 1 11/05/2018 13:50:18 AEST Save Delete Save Final Print View						

Additional Notes:

- Only users with Coordinator access are able to delete a Note that is not locked.
- Only users with Coordinator access are able to unlock a locked Note.

Please refer to screenshot examples on the next page.

Note Details	; ?				
Activity Date	23/04/2018				
Worker/s	Worker Two, ASC - UAT Service				
Work group	ASC - UAT Service				
Activity Type	Planning (before consent)				
Direct/Indirect	Indirect activity				
Case Summary	55667788				
Notes					
Did some things ar	nd spoke with the CSO				
Also associated with:	Marg Mango, Wife Michelle Mango, Indirect association				
Activity Length	Contact Case Work Travel				
	45 mins				
Edit locked	29/04/20 8 🖨				
Last update	Worker Two, ASC - UAT Service 26/04/2018 11:02:19 AEST				
Print View					

Note Details	0			
Activity Date	23/04/2018			
Worker/s	Worker Two, ASC - UAT Service			
Work group	ASC - UAT Service			
Activity Type	Planning (before consent)			
Direct/Indirect	Indirect activity			
Case Summary	55667788			
Notes				
Did some things an	d spoke with the CSO			
Also associated with:	Marg Mango, Wife Michelle Mango, Indirect association			
Activity Length	Contact Case Work Travel			
	45 mins			
Edit locked	29/04/2018 🔒			
Unlock for	Days			
Unlock reason	Please select			
Last update	Remove record from incorrect person Remove record from incorrect workgroup Edit inappropriate or incorrect information in text fields Edit incorrect dates Edit to other non-text fields Other			

Simply click the **blue** unlock icon, then..

- **1.** Enter the number of days you wish the record to be open for (it will autmatically re-lock after this time).
- 2. Select an Unlock reason Note 1
- **3.** Click **Save.** The note is now able to be edited.

Note 1 : Implemented 4th July 2018, Infoxchange SRS Update (v4.13.18)

6 Plans

A Plan is a structured program of activities you are able to create and maintain for a family from the **Plans** tab.

6.1 Create Plan

- 1. On the **Persons** Page, select the **Plans** tab.
- 2. Click Create New Plan. The Edit Plan Details form will appear.

supporting families	ASC Training 1 Carissa Carrot Female, DOB: 21/04/1985 (Age 32 yrs)	A Co
Home	Search Details Notes Alerts Referrals Plans asks Documents	
Persons	Plans Filte Create New	Plan
Days	No Plans to display	
Cases		B
Reports		
Admin	Date 15/05/2018 This plan is also associated with Review date (tick):	
☐ ₽ Recent List Carissa Carrot	* Oversight A Coordinator, ASC Training 1 Charles Carrot Husband Close date Description Last update Save	

3. Complete the details as below:

- the **Date** (auto-populates to today's date) and **Review date** (if required) by using the calendar icon

- in the **Description** field, record the name of your plan in line with the procedures of your service

- the **Oversight** field will default to the user entering the Plan. If additional workers are involved in the Plan, select the licon to add the relevant worker/s from the drop down list. To delete workers, select the 💌 icon

- in the **This plan is also associated with** section, select the family members involved in this Plan (as for the **ASC Case Summary**).

- 4. Click **Save**. Once the pla
- 5. n is saved, you are able to add Actions.

supporting families	ASC Training 1 Carissa Carr	Ot Female, [DOB: 21/04/1986	(Age 32 yrs)		A C
Home	Search Details N	lotes Alerts	Referrals Plans	Tasks Docum	ents	
Persons	Plans					Filter Create New Plan
Days	Date †	Review Date	Worker	w	ork Group	Description
Cases	15/05/2018		A Coordina	ator		Carrot Family Plan
Reports						1 to 1 of 1
Admin	Export Plans					
⊖	Edit Plan Deta Date 15/(* Oversight A Con Train Description Carr Actions	ails	This plan is al (tick): Charles Carrot Crystal Carrot	so associated w Husband Daughter Actions to display Save Delete	th I	Review date Close date Last update A Coordinator, ASC Training 1 15/05/2018 09:45:58 AEST Create New Action

6.2 Create new Action within a Plan

1. On the Edit Plan Details form, select Create New Action.

supporting families	ASC Training 1 Carissa Carrot Female, DO	B: 21/04/1986 (Age 32 yrs)	A C
Home	Search Details Notes Alerts R	eferrals <mark>Plans</mark> Tasks Documents	
Persons	Plans		Filter Create New Plan
Days	Date † Review Date	Worker Work (Group Description
Cases	15/05/2018	A Coordinator	Carrot Family Plan
Reports	•		1 to 1 of 1
Admin	Export Plans		
⊖ 2 Recent List Carissa Carrot	Edit Plan Details Date 15/05/2018 Ⅲ * Oversight ▲ A Coordinator, ASC Training 1 ★ Description Carrot Family Plan Actions	This plan is also associated with (tick): Charles Carrot Husband Crystal Carrot Daughter	Review date Close date Last update A Coordinator, ASC Training 1 15/05/2018 09:45:58 AEST Create New Action
	Print View	Save Delete	

2. The Edit Action Details template will appear.

supporting families	ASC Training 1 Carissa Carro	t Female, DOB	: 21/04/1986 (#	Age 32 yrs)			A C
Home	Search Details No	tes Alerts Ref	errals Plans T	asks Documents			
Persons	Plans					Filter	ate New Plan
Days	Date † F	Review Date	Worker	Work	Group	Description	
Cases	15/05/2018		A Coordinate	or		Carrot Family Plan	
Reports							1 to 1 of 1
Admin	Export Plans						
Carissa Carrot	Edit Plan Detai Date 15/05 * Oversight & A Coor Trainin Description Carrot Actions Edit Action De Date 15/05/2018	Is (2018) (IIII) (IIII) (IIII) (IIII) (IIII) (IIIII) (IIIII) (IIIII) (IIIIII) (IIIIIII) (IIIIIIII	This plan is also (tick): Charles Carrot Crystal Carrot No A ries	Actions to display		Review date Close date Last update A Coordinator, A Training 1 15/05/2018 09:2 AEST Creat	E New Action
Family name search	* Oversight 着 A Coordinator, ASC Training 1 🗙 Last update	Service ┛	G ac 1	oal not Goal fully chieved achieved OOOO5	N/A O	Ord	er: 0
			9	Save Delete			

3. Complete the details – refer guidance below:

- enter the **Date** (auto-populates to today's date) and **Review date** (if applicable) – this will create a task in *My Actions* (on the Home page) for those workers

- for **Oversight**, select the icon to add the relevant worker/s from the drop down list. This auto-populates with the worker recording the Action. To delete workers, select the icon - record details for the **Concerns and Worries**, **Strengths and Resources**, **Goal** and **Actions**, as appropriate / required.

- 4. Select Save.
- 5. To record another Action, click **Create New Action** the details screen will display. Complete as above and **Save**.
- 6. To print the plan, select **Print View** and print. The template includes signature blocks for your family and your service for use in accordance with the procedures of your service.

An example of a Plan with Actions is shown below :

The highlighted Action is the one which displays in the bottom of the screen.

supporting families	ASC Training) 1 Carrot Female,	DOB: 21/0	4/1986 (Age	e 32 yrs)			
			Referrals	Plans Tas				
Persons	Plans						Filt	er Create New Plan
Days	Date †	Review Date		Worker	Work	Group	Descriptio	on
	15/05/2018			A Coordinator			Carrot Fam	ily Plan
Reports								1 to 1 of 1
Admin	Export Plans							
⊖ 3 Recent List Carissa Carrot	Edit Plan Dat * Oversight Description Actions Date/Work	Details e 15/05/2018 A Coordinator, ASC Training 1 n Carrot Family Plan ter Strengths, Conce	This (tick Charl Cryst	plan is also a:): es Carrot al Carrot Goals	ssociated with Husband Daughter	Re C La Actions	view date Close date st update A Coord Training 15/05/2 AEST	Create New Action Review/Close Bridem Net
	15/05/2018 A Coordinate	Uncertain sleeping arrangements Concerns and Wo Strengths:	rries:	Improve sleep accommodatio	ping on	Secure se Crystal	eparate bed for	Review: Not Set Closed: Not Set
	15/05/2018 A Coordinate ♥ := 15/05/2018 A Coordinate ♥ :=	Concern No. 2 Concerns and Wo Strengths: Concern No. 3 Concerns and Wo Strengths:	rries: rries:	enter details	here	enter d	letails here letails here	Review: Not Set Closed: Not Set Review: Not Set Closed: Not Set
	Edit Acti Date 15/05/2018 Review date Closed date Closed date Coordinator Training 1 & Last update	on Details Concerns an Uncertain s arrangemen Strengths an	d Worries leeping hts d Resources	Goal Impi acco Outco Goal 1 Outco	rove sleeping mmodation me X coal fully coal fully coal fully coal fully coal fully coal fully coal fully for the	N/A O	Actions Secure separate	© i≣ bed for Crystal
Family name search	A Coordinato ASC Training 15/05/2018 12:50:11 AE	r, 1 ST						Order: 0



Within an Action, the icon with the yellow cross provides a short-cut to record a **Note**, **Support** payment and/or **Task** directly from the Plan. This is a particuarly useful, time-efficient feature.

Order: 0

When each Action within a Plan is created, it is numbered "0" – displayed in the bottom right of your screen. You can change the order in which your Actions are arranged in your Plan by using this box to assign the order you want for each Action.

Additional Notes:

- When using plans for the first time, it is recommended to keep the plan relatively simple create a new action for each different issue.
- You can record an external worker against an Action this is for information purposes only as they do not have access to ARC.

• A closed action can be viewed by clicking **View Prior Action**. This is required if you wish to print all actions associated with a plan.

6.3 Close an Action within a Plan

- 1. From the **Persons** Page, select the **Plans** tab.
- 2. Select relevant Plan from the Plans list to open the **Edit Plan Details** form.
- 3. Select relevant Action against the plan to open the **Edit Action Details** form.
- 4. Indicate the **Outcome** achieved based on the scale of 1 to 5 and record any notes in the **Comments on Outcome** box provided.
- 5. Enter a **Closed date** and select **Save** (update any comments as applicable).

6.4 Close Plan

- 1. From the **Persons** page, select the **Plans** tab.
- 2. Select relevant Plan from the Plans list to open the **Edit Plan Details** page.
- 3. Enter a **Close Date** and select **Save**.

As shown below, a Closed Plan and Closed Actions will show under View Prior button.

supporting families	ASC Training 1 Carissa Carrot Fe	male, DOB: 21/0	4/1986 (Age	: 32 yrs)		
Home	Search Details Notes	Alerts Referrals	Plans Task			
Persons	Plans				Silter Cro	to New Plan View Prior
Days	(No current P	Plans to display	فلنك للنستك	
Cases	Prior Plans			. ,		
Reports	Date † Review	w Date	Worker	Work G	roup Descri	iption
Admin	15/05/2018	4	Coordinator		Carrot I	Family Plan
□ C Recent List Carissa Carrot	Export Plans Edit Plan Details					1 to 1 of 1
	Date 15/05/2018	This (tick	plan is also as:):	sociated with	Review date	
	* Oversight A Coordinato Training 1 X	or, ASC Charl	es Carrot	Husband	Close date 15/	/05/2018
	Description Carrot Fami	ily Plan	al Carrot	Daughter	Last upuate A Ge Train 15/0 AES	ning 1 05/2018 12:58:25 T
	Actions				Creat	e New Action View Prior
	Date/Worker Strength 15/05/2018 Concern A Coordinator Concern \$\[colored] \$\] ::= Strength	ths, Concerns/Worn n No. 3 rns and Worries: ths:	ies Go e	oals Inter details here	Actions enter details here	Review/Close Review: Not Set Closed: Not Set
	Prior Actions					
	Date/Worker Strengths, Concerns/	Worries	Goals		Actions	Review/Close
	15/05/2018 A Coordinator ⊕ ∷≣ Uncertain sl arrangemer Concerns a Strengths:	leeping nts and Worries: :	Improve sleepir accommodation	ng 1	Secure separate bed for Crystal	Review: Not Set Closed:15/05/2018
	15/05/2018 A Coordinator Time Concerns a Strengths:	and Worries:	enter details h	nere	enter details here	Review: Not Set Closed:15/05/2018
	Edit Action Details	5				€]≣
	Date Conc	erns and Worries	Goal	or dotalla hora	Actions	
	LIS/US/2018 Con	ICEITI NO. 3	ente	er uetalis neré	enter detai	is here
	Strer	ngths and Resources	~			
	Closed date		Outcor	me 🗙	Comments on	Outcome 🗸 📥
Family name search	* Oversight A Coordinator, ASC Training 1 X	ice ┛	Goal no achieve 1 〇	ot Goal fully ed achieved f OOO5	N/A O	

6.5 Delete an Action within a Plan

Deleting an Action within a Plan should only occur in the circumstance where the action is a duplicate or was incorrectly entered.

<u>Note</u>: This action is irreversible therefore should be completed with caution.

- 1. From the **Persons** page, select the **Plans** tab.
- 2. Select appropriate Plan from the Plans list to open the **Edit Plan Details** form.
- 3. Select appropriate Action against the plan to open the **Edit Action Details** form.
- 4. Select **Delete**. The Action will now be deleted.

7 Tasks & Alerts

7.1 Create a Task

Tasks and Alerts display on the My Actions and Team Actions tab on the Home Page.

- 1. On the **Persons** page, select the **Tasks** tab.
- 2. Click Create New Task.

supporting families	ASC Tra Caris	aining 1 sa Cal	r rot Fe	emale, [DOB: 21/0	4/1986	(Age 3	2 yrs)			A Coordinat
Home	Search	Details	Notes	Alerts	Referrals	Plans	Tasks	Documents			
Persons	Tasks			Filter	Calendar '	View Cr	reate New	Task 🚺 🔊	Edit Task Det	tails	8
Days				No Tas	ks to display				Task date		
Cases									Start time		
Reports									Start time		
Admin									End time		
									* Worker/s 峕	A Coordinator, ASC Training 1 X	
⊟ ♂ Recent List Carissa Carrot									* Task type	~	
									Case Summary	12345678	
									Notes		-
									Send to calendar	○ Yes No	
									This task is also a	ssociated with (tick):	
									Charles Carrot	Husband	
									Crystal Carrot	Daughter	
									Created Completed/Closed Last update	15/05/2018	
										Save	

- 3. Enter **Task date** and **times**.
- The Worker/s field will default to the user entering the Task details.
 To add more workers, select the [▲] icon. To delete workers, select the [×] icon.
- 5. Select **Task type** and add any **Notes.**
- 6. Select 'Yes' to **Send to calendar** if the task is to be sent as a Microsoft Outloook calendar invitation. All workers associated with the task will receive a Microsoft Outlook calendar invitation <u>if</u> their email address has been supplied via their User Preferences details.
- 7. Include related family members as relevant by checking the tickbox in the **This task is also associated with (tick) :** section.
- 8. Select Save

NOTE :

> If Send to calendar has been selected, a message will be displayed at the top of the Edit Task Details form: either a confirmation that the invitation was sent or an error message that the calendar invitation was not able to be sent.

> When the Task has been completed, the **Completed/Closed** date field <u>must</u> be recorded – if not, the Task will continue to display on the **My Actions** and **Team Actions** tabs on the Home page.

To modify the Task, click on the Task and the edit screen will display on the right hand side. Update the details and select **Save.**

Edit Task Det	ails	80
Task date	23/05/2018	
Start time	10:00 am	
End time	11:00 am	
* Worker/s 备	A Coordinator, ASC Training 1 🗙	
* Task type	Appointment 🗸	
Case Summary	12345678 🗸	
Notes		-
Meeting with family	and CSO	
Send to calendar	○ Yes ● No	
This task is also a	ssociated with (tick):	
Charles Carrot	Husband	✓
Crystal Carrot	Daughter	✓
Created Completed/Closed	15/05/2018	
Last update	A Coordinator, ASC Training 1 15/05/2018 13:03:24 AEST Save Delete	
Print View		

Tasks can also be created and viewed in a Calendar View which gives users a visual representation of scheduled tasks by Day, Week or Monthly views.

9. From the **Tasks** tab, select the **Calendar View** button.



10. A schedule of tasks can be viewed by selecting the Day, Week or Month buttons (highlighted below).



Tasks display on the My Actions and Team Actions tabs on the Home page.

Overdue Tasks are highlighted in pink – as below.

supporting families	ASC Train	ning 1 e, Refer	ral and	Case Mana	agement (A	RC)	A Coordinat	or (Coordin	iator)
Home	My List	Team List	My Actions	Team Actions	Referrals				
Persons	Due Date	Between: Si	tart date 20/0	3/2018 🎹 End d	ate 12/06/2018	Go	(Calendar V	iew ?
Days	My Tasks					-			
Cases		e Date I	Time	Action Type	Workgroup	Person	Description	Details	
Reports	23/	/05/2018	10:00 AM	Task	ASC Training 1	Carissa Carrot	Meeting with family and CSO	Go to Ta	sk
Admin						Charles Carrot Crystal Carrot			
□ 2 Recent List Carissa Carrot	17/	/05/2018	03:00 PM	Task	ASC Training 1	Carissa Carrot Charles Carrot Crystal Carrot	Internal review	Go to Ta	sk
	01/	/05/2018		Task	ASC Training 1	Carissa Carrot Charles Carrot Crystal Carrot	review referral details and follow-up as required	Go to Ta	šk
	Mark Co	mplete							

Where an 'overdue' task has been completed, the **Completed/Closed date** needs to be recorded to stop them from displaying.

Additional Notes:

- Once a Task has been completed, enter the date in the **Completed/Closed** field using the calendar icon.
- To export tasks to a PDF file, click Export Tasks and the Export Task to PDF form will appear to the right of screen.
- From the Person record, **Tasks** tab, you can filter the tasks listed by clicking **Filter** and selecting the desired date range, type or worker, then click **Go**.

families	ASC Trainir Carissa	Carrot	Female, D	OB: 21/04	4/1986	(Age 3	2 yrs)
Home	Search De	tails Note	s Alerts	Referrals	Plans	Tasks	Documents
Persons	Tasks		Filter	Olendar V	lew Cre	ate New	Task 🔊
Days	Action Date	Start/End	Worker	Task			
Cases	1 23/05/2018	10:00 am	A	Annointme	nt		
Reports	0	11:00 am	Coordinator	Meeting wi	th family	and CSO	
Admin	17/05/2018	3:00 pm	A Coordinator	<i>Planning</i> Internal re	view		
Carissa Carrot	01/05/2018 ()		A Coordinator	Follow Up review refe as required	erral detai	ls and fo	llow-up
	Export Tasks	5				İ	L to 3 of 3
supporting families	ASC Trainin Carissa	^{ng 1} Carrot	Female, D	OB: 21/04	4/1986	(Age 3	2 yrs)
supporting families ^{Home}	ASC Trainir Carissa Search De	ng 1 Carrot stails Note	Female, D s Alerts	OB: 21/04 Referrals	4/1986 Plans	(Age 3 Tasks	2 yrs) Documents
supporting families Home Persons	ASC Trainir Carissa Search De Tasks	ng 1 Carrot Itails Note	Female, D s Alerts Filter	OB: 21/04 Referrals Calendar V	4/1986 Plans ^{(iew} Cre	(Age 3 Tasks ate New	2 yrs) Documents Task 🔉
supporting families Home Persons Days	ASC Trainin Carissa Search De Tasks Filter: From:	ng 1 Carrot stails Note	Female, D s Alerts Filter Type:	OB: 21/04 Referrals Calendar V	4/1986 Plans 'iew Cre	(Age 3 Tasks Pate New	2 yrs) Documents Task 2 Go
Supporting families Home Persons Days Cases	ASC Trainin Carissa Search De Tasks Filter: From: To:	ng 1 Carrot Italis Note	Female, D s Alerts Filter Type: Worker	OB: 21/04 Referrals Calendar V Appo	4/1986 Plans ^r iew Cre	(Age 3 Tasks ate New	2 yrs) Documents Task Go Clear
Supporting families Home Persons Days Cases Reports	ASC Trainin Carissa Search De Tasks Filter: From: To:	ng 1 Carrot Itails Note	Female, D s Alerts Filter Type: Worker Workgr	OB: 21/04 Referrals Calendar V Appo : : oup:	4/1986 Plans 'iew Cree intment	(Age 3 Tasks ate New	2 yrs) Documents Task S Go Clear
Supporting families Home Persons Days Cases Reports Admin	ASC Trainin Carissa Search De Tasks Filter: From: To:	ng 1 Carrot Italis Note	Female, D s Alerts Filter Type: Worker Workgr	OB: 21/04 Referrals Calendar V Appo : : oup:	4/1986 Plans 'iew Cre intment	(Age 3 Tasks ate New	2 yrs) Documents Task O Go Clear
Supporting families Home Dersons Cases Cases Admin Carissa Carrot	ASC Trainin Carissa Search De Tasks Filter: From: To: Action Date 23/05/2018	start/Er 10:00 am 11:00 am	Female, D s Alerts Filter Type: Worker Workgr A Coordi	OB: 21/04 Referrals Calendar V : Appo : Tasl Tasl	4/1986 Plans riew Cree intment <i>intment</i> ing with fa	(Age 3 Tasks Pate New	2 yrs) Documents Task () Go Clear d CSO

• A user with a Coordinator access level is able to delete a task record.

7.2 Create an Alert

The **Alerts** tab is used to create and manage alerts to record safety risks, health risks or other issues of concern in relation to a particular Person.

- 1. From the **Persons** Page, select the **Alerts** tab.
- 2. Click **Create New Alert** the Edit Alert Details form will open on the right-hand side.



- 3. Complete details, as guidance below:
 - the **Date** auto-populates to todays' date. This can be backdated.
 - Worker/s will default to the user entering the Alert record.

To add more workers, select the 🚨 icon. To delete workers, select the ጆ icon.

- select the **Alert type** from the drop-down list
- record details about the alert issue in the **Notes** box.

- tick the checkbox against related Persons, as relevant, for the Alert to display on their record.

4. Select Save.

A warning icon will appear next to the person's name, as highlighted below. (For the icon to display, click away from the **Alerts** tab (eg. click on the **Details** tab)).

A red icon relates to a safety risk and a blue icon for all other alerts. Once the alert expires, the warning icon will no longer be visible in the banner.



- 5. Enter a **Review date** (the task will appear in the **My Actions / Team Actions** tabs on the **Home** page). The *Review Date* and *Expiry Date* auto-populate these can be manually adjusted, as required. When an Alert is no longer relevant / required, open the Alert and record an **Expiry date**.
- 6. Click Save.

Additional Notes:

- To modify the Alert, open the Alert record, update as required, then select Save
- A user with a Coordinator access level is able to delete an alert record.

8 Managing Referrals

This section outlines the important functionality for making referrals to another service.

All Referrals are made / recorded from the **Referrals** tab on the **Persons** page.

Click the **Create new Referral** button to open the Referral form.

supporting families	ASC Training 1 A Coordinator (Coordi Carissa Carrot Female, DOB: 21/04/1986 (Age 32 yrs)	nator) F
Home	Search Details Notes Alerts Referrals Plans Tasks Documents	
Persons	Referrals Create new Referral Referral	8
Days	This person has no history of referrals on record	
Cases	○ Search ○ Favourites ○ Manual ● Family Services	
Reports	Send Enter Service, Organisation or Suburb	
Admin	Submit	
□ 2 Recent List Carissa Carrot		

There are **two** options for making a referral to another service - these are:

- Send a Referral to another service within ARC Family Services: This <u>sends</u> a referral to another service provider using ARC. The referral form is set to this option as the default.
- **Record a Referral Manual**: This <u>records</u> referrals to external providers services not using ARC.
 - IMPORTANT NOTE: The actual notification and documentation for the referral must be sent via channels <u>external to</u> ARC.

The *Search* and *Favourites* radio buttons relate to the Service Seeker database (maintained by Infoxchange), the use of which is not recommended for ASC services. For details of local service providers, please refer to <u>oneplace</u>

The following sections step through making a referral using both of the above methods.

- 8.1 Send a Referral to another service within ARC Family Services
- 1. On the **Persons** page, **Referrals** tab, click **Create new Referral**.
- 2. You will notice the Referral type of **Family Services** is already selected.
- 3. Enter *FaCC* or *IFS*, to bring up the list of services within ARC.
- 4. Select the required service from the dropdown list which appears
- 5. Select **Submit**.

supporting	ASC Training 1	A Coordinator (Coordinato	r)
families	Carissa Carrot Female, DOB: 21/04/1986 (Age 32 yrs)		•
Home	Search Details Notes Alerts <mark>Referrals</mark> Plans Tasks Docume	ents M	
Persons	Referrals Create new Referral	Referral 🕜	
Days	This person has no history of referrals on record		
Cases		O Search O Favourites O Manua O Family Services	
Reports		Send Dunk Island IFS	
Admin		Submit	
Carissa Carrot		Service Details	
Curissa Currot		Service Name Dunk Island IFS	
		Organisation IFS Training 2	
		Address Dunk Island QLD 4205	
		Phone 1 07 1234 1234	

The Referral form appears.

Referral		(
Status	New referral	
Linked Case Summa	rv	E
Please c	lick Save Draft button to enable Case Summary to link	
From ASC Training 1		Æ
To Dunk Island IES		
Service	Dunk Island IES	
Program / Group		
nogram / croup		
Organisation	IFS Training 2	
Referred Persons		E
PI	ease click Save Draft button to associate people	
Details		E
* Service Type		~
Presenting issues		
Additional Information		
Attachments		E
Please clic	k Save Draft button to enable documents to be attached	
Referral History		E
*Consent to refer	⊖ Yes ● No	
Date consent		
received		
Who provided consent to refer		
Comment		

6. Select **Service Type ***, then click **Save Draft**.

Service Type is required for departmental reporting. The Referral will not save if this field has not been completed.

Referral	0
Status	New referral
Linked Case Summa	ry 🖯
Please o	lick Save Draft button to enable Case Summary to link
From ASC Training 1	Œ
To Dunk Island IFS	Θ
Service	Dunk Island IFS
Program / Group	
Organisation	IFS Training 2
For Carissa Carrot	Œ
Referred Persons	Θ
PI	ease click Save Draft button to associate people
Details	Θ
* Service Type	Referred - ATST Family Wellbeing
Presenting issues	Referred - Family and Child Connect Referred - Intensive Family Support
Additional Information	
Attachments	Θ
Please clic	k Save Draft button to enable documents to be attached
Referral History	Θ
*Consent to refer	⊖ Yes ● No
Date consent received	
Who provided consent to refer	
Comment	
	Save Draft Sand

7. The **Referred Persons** section is populated with the primary Person record.

Click on the icon to attach the other Persons in the Case (to the referral).

Referral		0
Status	Draft	
Linked Case Summary		Θ
	12345678 (12/02/2019 -)	\checkmark
From ASC Training 1		Œ
To Dunk Island IFS		Θ
Service	Dunk Island IFS	
Program / Group		
Organisation	IFS Training 2	
For Carissa Carrot		Œ
Referred Persons		Θ
Additional associated	clients	•

8. The Person Search and Select box will pop-up.

Click the **Related** radio button to easily display the related Persons to select, as relevant for this referral.

<u>Note</u>: It may be that only <u>some</u> of the Persons with whom relationships are held are included in the Case.

Referre	ed Persons		
Additi	onal associated clients		+
Details	Ρε	erson Search and Select	
	O My List Recent Search	Crystal Carrot F 17/02/2007	^
Pr			
Additio			~
Attach		GO a-z 🤅 Save	Cancel

Simply, tick the checkbox as appropriate, then click **Save**. The selected Persons are now attached to the referral.

For Carissa Carrot		Œ
Referred Persons		E
Additional associated clients	Relationship	+
Charles Carrot	Husband	
Crystal Carrot	Daughter	A

9. Enter relevant details **Presenting Issues** and **Additional Information** to advise the receiving service about the needs of your family.

10. Click Save Draft.

At any point you can expand or collapse segments within the form by selecting the 🗐 icon. Note that once the Referral has been saved, *Comments* are stored in the Referral History segment, which needs to be expanded in order for them to be viewed.

11. The **Client File** is available to attach to the referral, to promote efficient sharing of information. Other documents can also be attached as a record of information provided to the referrer.

Client File Select & Upload		ttachments
There are no files associated with this document		
To upload, click the upload button or in newer browsers dra and drop files here.	ıg	There are no files associat To upload, click the upload butto and drop fil

12. If you choose to attach the **Client File**, click the button then select the information you wish to attach to the referral. Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes** and select **Attach file**.

Document Title Corises Corret Client File	
Document nice Calissa Califul Cilent File	
Person Information	Include
Name, Sex, DOB	
Alias Details	
Demographic Details	
Current Relationships	\checkmark
Addresses	
*12 First Avenue CHARLEVILLE 4470 (Home)	•
7 Long Mile Road CHARLEVILLE 4470 (Alternative)	\checkmark
Contacts	
4552 1234 (Phone (Hm))	\checkmark
carissa@carrot.com (Email)	\checkmark
4556 9887 (Emergency Contact)	\checkmark
Cases	
12345678 (ASC Case Summary 12/02/2019 -)	
Additional Details	
Select All	
Notes	
Alerts	
Plans	
Tasks	
Documents	
Include worker name details	
Additional Notor	

This file is now shown on the Referral form in the Attachments segment, as a pdf document.

You can choose which documents to send with the referral by clicking the red cross to remove them from the referral record.

Attachments		Θ
	Client File Select & Upload	
File Name	Uploaded	
client_file_6375.pdf	12/02/2019 12:35:15 AEST	×

13. Check **Consent to refer*** has been provided, and complete the 2 mandatory fields to capture when the consent was received and from whom.

Referral History	
*Consent to refer	Yes No
*Date consent received	
*Who provided consent to refer	
Comment	
	Save Draft Send Delete PDF Copy

14. Click Send when you are ready to send the referral.A pop-up box will appear asking if you are sure you wish to send the referral. Click OK.

			Are yo	ou sure you wis	sh to send this re	ferral?		×	
							Ca	ancel	
ASC T	raining	1 arrot camala	DOD: 21/04/1086	(Aco 22 uro)					A Coordinator (Coordinator (Coordinator)
Search	n Deta	ils Notes Alerts	Referrals Plans	Tasks Documents					— •
Refe	errals				Create	new Referral	Referral		0
	Id	Referral Date 1	Status	From	То		Referral sent 12/02/2019 12:4	41:52 AEST	
6	184	12/02/2019	Waiting	ASC Training 1 ASC Training 1	Relationships Matter		Status Waiting		
2	185	12/02/2019	Waiting	ASC Training 1 ASC Training 1	Dunk Island IFS IES Training 2		Linked Case Summary		
			1 to	2 of 2 results		R	12345678 (12/0	2/2019 -)	n.
							To Dunk Island IFS Service Dunk Island IFS Organisation IFS Training 2 For Carissa Carrot		e
							Referred Persons		Belatienshin
							Charles Carrot		Husband
							Crystal Carrot		Daughter
							* Service Type Referred - Intens	sive Family Support	<u> </u>
							Attachments		
							File Name	Uploaded	
							client_file_6375.pdf	12/02/2019 12:35:15 AEST	
							Referral History		
							Reterral sent by A Coordinator, ASC Training 1		12:41pm AEST Tue 12/02/19
							Date consent received 12/02/2019		
							Who provided consent to Carissa and Char refer	rles	
							Recall	Сору	

The Referral record will show on the **Person** page, **Referral** tab for all Persons included in the referral

- as above for CarrisaAND
- as below for each of Charles and Crystal.

supporting families	ASC Training 1 Charles Carrot Male, DOB: 02/06/1982 (Age 36 yrs)								
Home	Search	Details	Notes	Alerts	Referrals	Plans	Tasks	Documents	
Persons	Referr	alc						Create new R	eferral
Days	Keren	u15							
Cases	Id	Referr	al Date 🌡	Sta	ntus Fr	om		Го	
Reports	184	12/02	/2019	Wa	iting AS	SC Training SC Training	1	Relationships Matter	
Admin	185	12/02,	/2019	Wa	iting AS	SC Training SC Training		Dunk Island IFS IFS Training 2	
C Recent List Charles Carrot					1 to 2 of 2	results			2
supporting families	ASC Trai	ining 1 al Cai	rrot F	emale, I	DOB: 17/	02/2007	/ (Age 1	1 yrs)	
Home	Search	Details	Notes	Alerts	Referra	s Plans	Tasks	Documents	
Persons	Poforr	alc						Create new	Referral
Days	Refeff	ais						create new	Kererrur
Cases	Id	Refe	rral Date	1	Status	From		То	
Reports	18	5 12/0	2/2019		Waiting	ASC Trai ASC Trai	ning 1 ining 1	Dunk Island IF IFS Training 2	S
Admin					1 to 1 of	1 results			x 🔎

Simply click on the blue document icon to open the record.

supporting families	ASC T Advi	raining 1 ice, Refei	rral and	Case M	anageme	nt (ARC	:)
Home	My Lis	t Team List	My Actions	Team Acti	ons Referral		
Persons	6						
Days	Sen	Draft					
Cases	Referr	als					
Reports	I	d↓ Send Date	Status	Sent From	Sent To	Sent By	Client
Admin Crystal Carrot Carles Carrot Carles Carrot Thomas Tomato		12/02/2019 85 12:41:52	9 Waiting	ASC Training 1 ASC Training 1	Dunk Island IFS IFS Training 2	A Coordinator	Carissa Carrot DOB: 21/04/1986 Gender: female
Bella Banana		12/02/2019 84 12:01:21	9 Waiting	ASC Training 1 ASC Training 1	Relationships Matter	A Coordinator	Carissa Carrot DOB: 21/04/1986 Gender: female
				1 to 2 of 2 r	esults		x 🖌

ALL referrals sent are also listed on the Home Page, Referrals tab, Sent sub-tab.

<u>NOTE</u> : Each column on this screen is active as a sorting option. Simply click on the blue column heading you wish to use to sort records.

The receiving service within ARC will **Acknowledge** the referral, then respond as **Accepted** or **Declined**. This will update the **Status** showing in your workgroup.

If the Referral needs to be recalled, open the Referral by clicking the blue pencil icon and click the **Recall** button in the bottom left of the form. This will only function while the Status is *Waiting*.

The referral will no longer display in the **Sent** tab (**Referrals** tab, **Home** page) and will display as below on each of the **Person** records :

supporting families	ASC Training 1 Carissa Carrot Female, DOB: 21/04/1986 (Age 32 yrs)								
Home	Sear	ch D	etails Notes	Alerts	Referral	ls Plans	Tasks	Documents	
Persons	Rei	forral	c		Cr	reate new R	eferral	View Recalled and	Declined
Days		cira	5						
Cases		Id	Referral Date	Sta	tus F	From		То	
Reports	Ø	184	12/02/2019	Wai	ting A	ASC Training ASC Training	g 1 <i>g 1</i>	Relationships Mat	ter
Admin				:	1 to 1 of	1 results			x 🛃
	Reca	lled an	d Declined						
Carissa Carrot		Id	Referral Date	, St	tatus	From		То	
Crystal Carrot Charles Carrot	Ø	185	12/02/2019	Re	ecalled	ASC Trai ASC Trai	ning 1 ning 1	Dunk Island IFS Training	IFS 2
Thomas Tomato Bella Banana	1 to 1 of 1 results								

8.2 Record a Manual Referral

Manual referrals are used to record referrals made to services not using ARC.

IMPORTANT NOTE : Notification of the referral and associated documents **must be sent separately** via channels (eg. email, post, fax) external to ARC.

1. On the **Persons** page, **Referrals** tab, click **Create new Referral**.

supporting	ASC Training 1 A Coordinator (Coordinator)	-
families	Carlssa Carrot Female, DOB: 21/04/1986 (Age 32 yrs) 🗮 🌻 🕩	
Home	Search Details Notes Alerts Referrals Plans Tasks Documents Men	
Persons	Referrals Create new Referral Referral ?	
Days	This person has no history of referrals on record	
Cases	Search Favourite Manual Family Services	
Reports	Service Family Relationship Counselling	
Admin	Designed (
🗆 🖸 Recent List	Group	
Carissa Carrot	Organisation Name	
	Phone 4589 1234	
	Fax	
	Email	
	Submit	

2. Select Referral type of **Manual**,

- enter name of the service / organisation to whom you are making the referral (not all data fields need to be completed),

- select Submit.

The Referral form will appear.

Note the message in the light blue box at the top of the form – the actual referral notification and documentation must be sent to the receiving service via channels external to ARC.

Referral	
You may wis	This type of referral will NOT be sent electronically.
Status	New referral
Linked Case Summary	New reterrat
pl.	ease dirk Save Draft button to enable Case Summary to link
From ACC Training 1	
From ASC Training 1	
To Family Relationship Co	Esmilu Balationship Councelling
Service	Panny Relationship Coursening
Program / Group	
Organisation	
Phone	4589 1234
Fax	
Email	
For Carissa Carrot	f.
Referred Persons	
	Please click Save Draft button to associate people
Details	
* Service Type	
Presenting issues	
Additional Information	
Attachments	E
Plea	se click Save Draft button to enable documents to be attached
Referral History	E
*Consent to refer	⊖Yes ● No
Date consent received	
Who provided consent to refer	
Comment	
comment	
	Status to: Save Draft Waiting

3. Select **Service Type***, then click **Save Draft**.

A validation message will appear if you attempt to save the Referral without selecting the relevant **Service Type**. **Service Type** is required for departmental reporting.

Details	8
* Service Type	
	Referred - Domestic and Family Violence
	Referred - Substance Misuse
Presenting issues	Referred - Mental Health Child
	Referred - Mental Health Adult
	Referred - Disability
Additional	Referred - Youth
Information	Referred - Health
	Referred - Other Child and Family Support
Attachments	Referred - Other

4. The **Referred Persons** section is now populated with the primary Person record.

	For Carissa Carrot	Œ
	Referred Persons	Θ
	Additional associated clients	+
Click on th	e 🚺 icon to attach the other Persons in the (Case to the referral.

Using the **Related** search button, select the Persons to be included in the referral.
 <u>Note</u>: It may be that only some of the Persons with whom relationships are held are included in the Case. Click **Save**. The selected Persons are now included in the Referral.

For <i>Carissa Carrot</i> Referred Persons		
Additional associated clients		+
Per	son Search and Select	
My List ream List Recent Related Search	□Crystal Carrot F 17/02/2007 ☑ Charles Carrot M 02/06/1982	^
At	GO a-z i Save	Cancel

For Carissa Carrot		Œ
Referred Persons		Θ
Additional associated clients	Relationship	+

- 6. Enter in **Presenting Issues** and **Additional Information** if required.
- 7. Enter any **Comments** and select **Save Draft.**

At any point you can expand or collapse segments within the form by selecting the 🙂 icon. Note that once the Referral has been saved, *Comments* are stored in the Referral History segment which needs to be expanded in order for them to be viewed.

8. To create a record of the files provided with the referral, expand the **Attachments** segment by selecting the Browse / Select & Upload from files located on the user's computer (external to ARC)



9. If you select **Client File**, simply tick the information you wish to attach to the referral. Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes** and select **Attach file**.

Export Person Details	
Export Person Details	
Document Title Carissa Carrot Client File	
Person Information	Include
Name, Sex, DOB	V
Alias Details	
Demographic Details	V
Current Relationships	V
Addresses	
*12 First Avenue CHARLEVILLE 4470 (Home)	Y
7 Long Mile Road CHARLEVILLE 4470 (Alternative)	Y
Contacts	
4552 1234 (Phone (Hm))	V
carissa@carrot.com (Email)	V
4556 9887 (Emergency Contact)	V
Cases	
12345678 (ASC Case Summary 12/02/2019 -)	V
Additional Details	
Select All	
Notes	
Alerts	
Plans	
Tasks	
Documents	
Include worker name details Yes No 	
Additional Notes	
Autonal Notes	
	Attach fi

This file is now shown on the Referral form in the Attachments segment, as a pdf document.

Attachments	Client File Select & Upload	E
File Name	Uploaded	
Family consent.docx	12/02/2019 14:23:55 AEST	×
client_file_6375.pdf	12/02/2019 14:22:55 AEST	×

Any documents attached to the Case Summary will also be automatically included in the referral. You can choose which documents to send with the referral by clicking the red cross to remove them from the referral record.

10. Record **Consent to refer*** - when checked *Yes*, the date and who provided the consent are mandatory fields.

Referral History	Θ
*Consent to refer	⊙ Yes ⊖ No
*Date consent received	12/02/2019
*Who provided consent to refer	Carissa and Charles
Comment	
	Status to: Save Draft PDF Delete Waiting

11. Click **Waiting.** The message below will appear, click **OK**.

The status of this referral will be updated to Waiting. Are you sure you wish to continue?	×
Cancel	

<u>Note</u>: A PDF copy of the referral <u>must</u> be generated and either emailed or printed/faxed to the receiving service – it is <u>not sent</u> to the other service through ARC.

Referral		
You m	This type of referral will NOT be sent electronically. nay wish to PDF the referral and send this manually to the destination service.	
Referral sent	12/02/2019 14:29:35 AEST	
Status	Waiting	
Linked Case Summary		(
	12345678 (12/02/2019 -)	
From ASC Training 1		
To Family Relationship Counselli	ing	l
Service	Family Relationship Counselling	
Phone	4589 1234	
For Carissa Carrot		
		(
Referred Persons		
Referred Persons Additional associated clients	Relationship	
Referred Persons Additional associated clients Charles Carrot	Relationship Husband	
Referred Persons Additional associated clients Charles Carrot Details	Relationship Husband	
Referred Persons Additional associated clients Charles Carrot Details * Service Type	Relationship Husband Referred - Other Child and Family Support	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments	Relationship Husband Referred - Other Child and Family Support	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name	Relationship Husband Referred - Other Child and Family Support Uploaded	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History Referral sent by A Coordinator, ASC Trai	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST 12/02/2019 14:22:55 AEST	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History Referral sent by A Coordinator, ASC Trai * Consent to refer	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST 12/02/2019 14:22:55 AEST ining 1 2:29pm AEST Tue 12/02/19 Yes	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History Referral sent by A Coordinator, ASC Trai *Consent to refer Date consent received	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST ining 1 2:29pm AEST Tue 12/02/19 Yes 12/02/2019	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History Referral sent by A Coordinator, ASC Trai *Consent to refer Date consent received Who provided consent to	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST 12/02/2019 14:22:55 AEST ining 1 2:29pm AEST Tue 12/02/19 Yes 12/02/2019 12/02/2019 Yes 12/02/2019 Carissa and Charles	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History Referral Sent by A Coordinator, ASC Trai *Consent to refer Date consent received Who provided consent to refer	Relationship Husband Referred - Other Child and Family Support uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST 12/02/2019 14:22:55 AEST uploaded 12/02/2019 14:22:55 AEST 12/02/2019 14:22:55 AEST 12/02/2019 14:22:55 AEST 12/02/2019 14:22:55 AEST 12/02/2019 12/02/2019 2:29pm AEST Tue 12/02/19 Yes 12/02/2019 Carissa and Charles	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History Referral sent by A Coordinator, ASC Trai *Consent to refer Date consent received Who provided consent to refer Comment	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST ining 1 2:28pm AEST Tue 12/02/19 Yes 12/02/2019 Carissa and Charles	
Referred Persons Additional associated clients Charles Carrot Details * Service Type Attachments File Name Family consent.docx client_file_6375.pdf Referral History Referral Sent by A Coordinator, ASC Trai *Consent to refer Date consent received Who provided consent to refer Comment	Relationship Husband Referred - Other Child and Family Support Uploaded 12/02/2019 14:23:55 AEST 12/02/2019 14:22:55 AEST ining 1 2:29pm AEST Tue 12/02/19 Yes 12/02/2019 Carissa and Charles	

The *Status* is updated to *Waiting* and at the bottom of the form, the **Accepted** and **Declined** buttons are now displayed.

12. Once the referral has been accepted by the other service (by way of a communication exchange outside of ARC), you must <u>manually update</u> the **Status** of the referral to **Accepted** or **Declined**. Click relevant button.

Where the referral is **Accepted**, the referral will show on the **Person** page, **Referral** tab for each Person included in the referral.

supporting families	ASC Training 1 Carissa Carrot Female, DOB: 21/04/1986 (Age 32 yrs)
Home	Search Details Notes Alerts Referrals Plans Tasks Documents
Persons	Poformals Create new Referral View Recalled and Declined
Days	
Cases	Id Referral Date 🖡 Status From To
Reports	Iso 12/02/2019 Accepted ASC Training 1 ASC Training 1 ASC Training 1 ASC Training 1
Admin	1 to 1 of 1 results 🔀 🔀
supporting families	ASC Training 1 Charles Carrot Male, DOB: 02/06/1982 (Age 36 yrs)
Home	Search Details Notes Alerts Referrals Plans Tasks Documents
Persons	Referrals Create new Referral View Recalled and Declined
Days	Id Referral Date Status From To
Cases	
Reports	ACCEPTED ACCEPTED ACCEPTED ASC Training 1 Family Relationship Counselling
Admin	1 to 1 of 1 results

... AND on the Home Page, Referrals tab, Sent sub-tab....

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)							
Home	My L	ist T	Feam List	My Actions	Team Action	s Referrals		
Persons	1		_					
Days	Sent Draft							
Cases	Referrals							
Reports		Id↓	Send Date	Status	Sent From	Sent To	Sent By	Client
Admin								Carissa
☐ ♂ Recent List Charles Carrot Carissa Carrot Crystal Carrot Thomas Tomato Bella Banana	⊘	187	12/02/2019 14:29:35	Accepted	ASC Training 1 ASC Training 1	Family Relationship Counselling	A Coordinator	Carrot DOB: 21/04/1986 Gender: female
	 Image: Constraint of the second se	184	12/02/2019 12:01:21) Declined	ASC Training 1 ASC Training 1	Relationships Matter	A Coordinator	Carissa Carrot DOB: 21/04/1986 Gender: female

The status of <u>all</u> Referrals <u>made to another service</u> are shown on the Home Page, **Referrals** tab, on the **Sent** sub-tab.
8.3 Viewing Declined Referrals

When a referral to another service is Declined by them, it will display in the **View Recalled and Declined** segment on the **Referrals** tab, on the **Persons** page.

To record the situation where the service has declined a Manual referral, click **Declined**. The *Reason declined* field will display.

Commen	No capacity at this time	
Reason declined	Does not meet eligibility requirements Insufficient information to assess referral Outside catchment area Other reason for declining referral	
	Decimeu	

Select the relevant response from the drop-down options and click **Declined**.

supporting families	ASC Car	Train İSS a	ing 1 a Cai	rrot F	emale, I	DOB: 21/	′04/1986	(Age 3	2 yrs)		
Home	Searc	ch D	etails	Notes	Alerts	Referral	s Plans	Tasks	Documents		
Persons	Ref	erra	ls			Cr	eate new R	eferral	View Recalled and Declined		
Days		Create new Referral View Recalled and Declined									
Cases		This person has no history of referrals on record									
Paparta	Reca	lled ar	nd Decl	ined							
Reports		Id	Refer	ral Date 🌡	Sta	atus I	From		То		
Admin	Ø	185	12/02	/2019	Re	called 4	ASC Trainin ASC Trainin	g 1 <i>g 1</i>	Dunk Island IFS IFS Training 2		
Carissa Carrot	6	184	12/02	/2019	De	clined	ASC Trainin ASC Trainin	g 1 <i>g 1</i>	Relationships Matter		

The referral record is available in the **View Recalled and Declined** section.

NOTE : As outlined in the preceding sections, the *Status* of *Declined* is recorded :

- for Manual Referrals by the user manually updating the Status
- for *Family Services* Referrals by the other service in ARC.

9 Days

The **Days** page provides an alternate view for Notes and Tasks for the relevant day/date.

supporting families	ASC Training 1 Advice, Ref	erral and C	ase Mana	agement (A	RC)
Home 🤇	Notes Tasks				
Persons	List date ┥ 16/05/2	018 🔳 🕨			8
Days	Notes:			Filter Create New	Note 🔈
Cases	Given Name	Family Name 🌡	DOB	Contact Type	
Reports	1 📝 Carissa	Carrot	21/04/1986	at_70 Indirect activity	† O
Admin	2 📝 Crystal	Carrot	17/02/2007	at_70 Indirect activity	† O
□ C Recent List Carissa Carrot	3 📝 Charles	Carrot	02/06/1982	at_70 Indirect activity	† 0

Navigating within the Days Page 9.1

When you select a tab (Notes or Tasks), the records displayed will default to show those for the displayed date.

You can navigate through the days by clicking the left and right navigation arrows or by selecting a date via the calendar icon.

Click the icon to open the record. Click the record. Click the record.

Hovering over the information icon displays a summary of the record's information. The Filter button can also be used to refine search parameters.

Note : If a Note or Task is associated with more than one Person, it will display multiple times - as shown in the screenshot above.

9.2 Creating a New record from a Tab on the Days Page

- From each tab, you are able to create a new record for Notes or Tasks respectively. 1. Click Create New <Note/Support/Task> button. The Search for person form will appear to the right of screen (as below).
- Complete Search and click on the 🖤 icon beside the appropriate Person to create a new 2. record.

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)					A Coo	ordii
Home	Notes Tasks						
Persons	List date 🚽 16/05/2018	Search for pers	son to create	new Tasl	for 16/05	/2018	
Days	Tasks: Create New Task 2	Given Na	ame				
Cases	No Tasks exist.	Family Na	ame Carrot				
Reports			Sex () Male()	Female			
Admin		Fu	izzy 🖌	_			
□ C Recent List Carissa Carrot			Search or Select Fro Last 28 D	om Recen Days 🔽	t		
		Results					
		Given Name †	Family Name	Sex	DOB	Match	
		Carissa	Carrot	Female	21/04/86	0)
		Charles	Carrot	Male	02/06/82	0 🐏	
		Crystal	Carrot	Female	17/02/07	0 🐏	
					1 to 3 of	3 results	

10 Documents

Documents may be associated with a Person record in two ways:

- As an attachment any file, up to a maximum of 5 MB, can be attached to a person record.
- Via the <u>Merge</u> function selected information from the person record, including information about the user and some system information, can be merged into a new Rich Text Format (RTF) document that can be opened in Microsoft Word or OpenOffice. A user with Coordinator access level is able to create and edit merge document templates.

10.1 Documents on the Person record

To attach and manage documents on the Person record :

From the Persons page, on the Person record, select the Documents tab.
 Click Create New Document and the Edit Document Details form will appear to the right of screen.

supporting families	ASC Training 1 Crystal Carrot Female, DOB: 17/02/2007 (Age 11 yrs)	
	Search Details Notes Alerts Referrals Plans Tasl Documents	
Persons	Documents Filt Create New Document (OP	Edit Document Details
Days	Documents	Date 12/02/2010
Cases	No Documents to display	Bring Up
Reports		
Admin		* Worker/s 📥 A Coordinator, ASC Training 1 ≍
Admin		Document Type Attachment
🖯 🛢 Recent List		Document
Crystal Carrot Carissa Carrot		Туре
Charles Carrot		Case Summary 12245679 (12/02/2010 - current)
Thomas Tomato Bella Banana		12343076 (12/02/2013 - Currenc) •
		Description
		This document is associated with (tick):
		Name † Relationship Associate record with:
		Carissa Carrot Mother
		Charles Carrot Father
		May be edited to 19/02/2019
		Last update
		Save Save Final

- 2. Select the **Date** by clicking the calendar icon defaults to today's date.
- 3. Enter the **Bring Up** (review) date by clicking the calendar icon, if required.
- 4. Click the **Worker/s** icon to add additional workers, if relevant.
- 5. Select **Type** from drop down list : Referral, Assessment, Other.

The **Case Summary** field auto-populates the current Case Summary for this Person. <u>NOTE</u>: Documents relevant to the **Case / Case Summary** can be attached to the **Case Summary** record.

- 6. Add a **Description** of the document. (This description will be displayed in the Documents list).
- 7. Click Save.

The **Select File...** button (highlighted below) will now be available to select the document you wish to attach.

supporting families	ASC Training 1 Crystal Car	rot Female, DOB: 17	7/02/2007 (Age 11 yrs)					
Home	Search Details	Notes Alerts Referra	als Plans Tasks <mark>Docum</mark>	ents				
Persons	Documents		Filter Create New Do	cument O D	Edit Docum	ent Details		80
Days	Documents				Luic Docum]==	
Cases	Date †	Worker	Document Type		Dat	te 12/02/2019		
Reports	12/02/2019	A Coordinator	Attachment 2018 School report		Bring U	Jb		
Admin	Evenet Depending of	of Decumente		1 to 1 of 1	* Worker/s	A Coordinator	r, ASC Training 1 X	
Admin	Export Properties o	or Documents			Document Typ	on Attachment		
Coveral Correct					Docume	nt Select File	(Max File Size: 5 MB)	
Carissa Carrot					Тур	oe Other	~	
Charles Carrot Thomas Tomato					Case Summar	12245670 /	12/02/2010 - current)	1
Bella Banana					Cube Dumma	12345078 (.	12/02/2019 - currency +	1
					Descriptio	2018 School	report	
						2010 001001	Topore	
					This document is a	ssociated with (tick):	
					Name †	Relationship	Associate record with:	
					Carissa Carrot	Father		
					May be edited t	to 19/02/2019		
					Last updat	te A Coordinator	r, ASC Training 1	
						Save Delete	Save Final	

8. Click **Select File...** and the following dialog box will appear.

Upload File	supporting families
Select File	Browse (Max File Size: 5 MB) Upload File Cancel
Instructions	 First select the file to load to the server using the browse button. Once the file has been selected, click 'Upload File' to load to server. You will receive a confirmation when the action has been completed.

- 9. Click **Browse** and locate the file you would like to upload.
- 10. Click **Up Load File**. The document will be attached to the person record and the filename will be displayed in the Document field. Click **Save**.

supporting families	ASC Training Crystal Ca	1 arrot Female, I	DOB: 17/02/	/2007 (/	Age 11 y	rs)					
	Search Detail	s Notes Alerts	Referrals	Plans ⁻	Tasks D	ocuments					
Persons	Documents			Filter	Create N	ew Document	00	Edit Docume	nt Details		80
Days	Documenta	,								1	
Cases	Date †	Worker	Document 1	Гуре				Date	12/02/2019]	
Reports	12/02/2019	A Coordinator	Charleville St	ate Scho	ol - 2018.d	locx		Bring Up		J	
Admin			2018 School	report		1	to 1 of 1	* Worker/s 🎴	A Coordinator	, ASC Training 1 ≍	
➡ ₴ Recent List Crystal Carrot Carissa Carrot Charles Carrot Thomas Tomato Bella Banana	Export Propertie	s of Documents						Document Type Document Type Case Summary Description	Attachment Charleville Sta Change Other [12345678 (1 2018 School	ate School - 2018.docx Max File Size: 5 MB)	
								Name 1	Relationship	Associate record with:	
								Carissa Carrot	Mother		
								Charles Carrot	Father		
								May be edited to	19/02/2019		
Family name search								Last update	A Coordinator 12/02/2019 1 Save Delete	, ASC Training 1 5:01:10 AEST Save Final	
GO									View Docum	ent	

The record will automatically lock on the date displayed *May be edited to dd/mm/yyyy*. If you click **Save Final**, it will lock the record immediately.

supporting families	ASC Training Crystal Ca	1 arrot Female,	DOB: 17/02/2007 (A	Age 11 yrs)				
Home	Search Detail	ls Notes Alerts	Referrals Plans	Tasks Documents	;			
Persons	Documente	-	Filter	Create New Docume		Document D	etails	0
Days	Documenta	5				Document D	otano	
Cases	Date †	Worker	Document Type			Date	12/02/2019	
-	12/02/2019	A Coordinator	Attachment	-1 2010 dam.		Bring Up		
Reports	0		2018 School report	01 - 2018.docx		Worker/s	A Coordinator, ASC Training 1	
Admin	Export Propertie	e of Documents		1	1 to 1 of 1	work group	ASC Training 1	
E C Recent List	export roperate					Туре	Attachment	
Crystal Carrot						Туре	Other	
Carissa Carrot Charles Carrot						Case Summary	12345678	
Thomas Tomato						Document Name	Charleville State School - 2018.docx	
Bella Banana						2018 School report		
						2010 301001 10001		
						Last update	A Coordinator, ASC Training 1	
						Edit locked	12/02/2019 1.04.45 AEST	
						Luit locked	12/02/2019	
							View Document	

Users with Coordinator access are able to unlock locked records by clicking on the blue unlock icon.

Additional Notes:

• Only one document file can be uploaded for a document record. If you want to attach multiple document files, you will need to create multiple document records.

To view the document

11. Click View Document.

r		
Edit Docume	nt Details	80
Date	12/02/2019	
Bring Up		
* Worker/s 🖴	A Coordinator, ASC Training 1 🗙	
Document Type	Attachment	
Desument	Charleville State School - 2018.docx	
Document	Change (Max File Size: 5 MB)	
Туре	Other 🔽	
Case Summary	12345678 (12/02/2019 - current) 🗸	
Description		
	2018 School report	
This document is ass	ociated with (tick):	
Name †	Relationship Associate record with:	
Carissa Carrot	Mother 🗌	
Charles Carrot	Father 🗌	
May be edited to Last update	19/02/2019 A Coordinator, ASC Training 1 12/02/2019 15:07:40 AEST Sava Deleta Sava Final	
C	View Document	

Important Note: If you view the attached document and make changes to the document, the changes will not be saved in the attached document. You will need to save the modified document to your network or local PC and then re-attach the modified document.

To change the document:

12. Click **Change**... and locate the required new file via the dialog box.

Edit Documer	nt Details	80
Date	12/02/2019	
Bring Up		
* Worker/s 🎴	A Coordinator, ASC Training 1 🗙	
Document Type	Attachment	
Document	Change	
Туре	Other 🗸	
Case Summary	12345678 (12/02/2019 - current) 🗸	
Description		
	2018 School report	
This document is ass	ociated with (tick):	
Name 🕇	Relationship Associate record with:	
Carissa Carrot	Mother 🗌	
Charles Carrot	Father	
May be edited to	19/02/2019	
Last update	A Coordinator, ASC Training 1 12/02/2019 15:07:40 AEST	
5	Save Delete Save Final	
	View Document	

13. The document attachment pop-up box will appear:

https://srs-qld-families-trainin	.infoxchangeapps.net.au/loaddoc.php	notesid=821&doctyp	e=Attachment			
Upload File				suppo fami	rtin lies	g
Select File		Browse	(Max File Size: 5	5 MB)		
[Jpload File Cancel					
Instructions	First select the file toOnce the file has beerYou will receive a con	load to the se selected, clic firmation whe	rver using the bro k 'Upload File' to n the action has b	owse butto load to se been comp	n. rver. leted.	

Locate the new document to attach, click Upload File.

14. Click **Save.** The new document will attach and the old document will be removed.

10.2 Merging Documents

This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon 😨 to access SRS Help.

Merge documents allows you to create letters and documents containing merged client information based on a standard template. Examples include referral letters and notifications.

Note that the merge document option will only be shown if merge templates have already been created for your organisation.

Additional Notes:

• A user with an Administrator or Coordinator access level is able to create and edit merge document templates.

10.3 Deleting Documents

A user with a Coordinator access level is able to delete a document record.

Edit Docume	nt Details	8
Date	12/02/2019	
Bring Up		
* Worker/s 🖴	A Coordinator, ASC Training 1 X	
Document Type	Attachment	
Document	Charleville State School - 2018.docx (Max File Size: 5 MB)	
Туре	Other 🗸	
Case Summary	12345678 (12/02/2019 - current) 🗸	
Description		
	2018 School report	
This document is ass	ociated with (tick):	
Name †	Relationship Associate record with:	
Carissa Carrot	Mother 🗌	
Charles Carrot	Father 🗌	
May be edited to	19/02/2019	
Last update	A Coordinator, ASC Training 1 12/02/2019 15:07:40 AEST	
2	Save Delete Save Final	
	View Document	

11 Reports

ARC includes a report engine that enables you to generate a wide variety of aggregated reports and data lists to assist with organisational management and reporting to stakeholders.

The different tabs on the **Reports** Page access different report categories: Reports, Lists, Referrals, Custom and Results.

Users with Coordinator Access profile can view all tabs. Normal Users have a subset available.

11.1 Reports

Reports are located in several of the tabs within the Reports page.

11.1.1 Reports tab

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)					
Home	Reports Lists Refe	errals Custom Results				
Persons	Workgroup	ASC Training 1				
Days	Workgroup					
Cases	Report type	Please select Demographic Report				
Reports	Include in report	Profile Report Contact Report				
Admin	Period of Interest	Family Report (using relationships) Plan Report				
		ARC Performance Report (ASC) OASIS Report (ASC)				
	Ctart data					

On the **Reports** page, **Reports** tab, you can generate a number of reports. The *Demographic, Profile, Contact, Family* and *Plan* reports are generic to the SRS product.

The *ARC Performance Report* and *OASIS Report* have been specifically developed for Assessment and Service Connect services to assist in managing your service and streamline reporting requirements.

ARC Performance Report

The ARC Performance Report provides data to support the oversight and management of your work with families. It is used by the department to consolidate performance reporting figures provided to key internal and external stakeholders.

Services are able to run a corresponding *ARC Performance List* (from the Lists tab) which displays the individual records representing the totals included in the *ARC Performance Report*, for data verification and validation.

The ARC Performance Report presents 6 tables of data for your service :

- 1. Service hours showing Direct activity and Indirect activity Notes
- 2. Number of Case Summaries, by status, at the end of the specified period (cumulative)
- 3. Number of Case Summaries created during the specified period by Priority
- 4. Number of Open Case Summaries by *Initial Family Contact* response, as at the end of the specified period
- 5. Number of Case Summaries closed within the specified period by Closure Reason
- 6. Number of Referrals out to a secondary service by Service Type.

OASIS Report

The OASIS Report is used for satisfying performance-based acquittal obligations of services. The format of the report is the same as required to be entered into OASIS by service providers. The **Counting Rules** defined for each of the measures in the **OASIS Report** are available in <u>Section</u> <u>11.5</u> of this Manual.

Services are able to run a corresponding **OASIS List** (from the Lists tab) which displays the individual records representing the totals included in the OASIS Report, for data verification and validation.

11.1.2 Lists tab

The **Lists** tab provides details of the individual records that have been used to generate the corresponding reports. The List can be exported to Excel, enabling you to format and analyse the data as you require. (Refer section <u>Exporting Report Results</u>)

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)
Home	Reports Lists Referrals Custom Results
Persons	Workgroup ASC Training 1
Days	workgroup.) (To view lists for another workgroup change to that workgroup.)
Cases	List type Please select
Reports	Demographic Details Profile Details (by person)
Admin	Contact Details (by person)
	Include Identifying Details Details Details (by contact) Contact Totals (by person) Family List (using relationships)
	Period of Interest Payments Payments (by family)
	Start date Plans
	End date ARC Performance List (ASC) OASIS List (ASC)

11.1.3 Referrals tab

The Referrals tab allows you to generate reports about :

• Referrals *sent* by your service

The option for *Referrals received* by your service will be NIL as this functionality is not applicable for Assessment and Service Connect services.

11.1.4 Custom tab

This is standard functionality from the Infoxchange SRS product. It is generic to all SRS systems and not specific to ARC.

For guidance on using this feature, click on the Help icon ^(?) to access SRS Help or review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides

Custom Reports provide a variety of ways to aggregate data, allowing more flexibility in reporting than the standard Reports tab. Using Custom Reports may also mean that you are able to run one regular report instead of multiple standard reports.

11.2 Generating Reports and Lists

1. On the **Reports** page, **Reports** tab or **Lists** tab, select the **Report type** or **List type** required.



Select parameters as required.
 Select period range from the **Period of Interest** drop down menu.
 Alternatively, you can use the calendar icon to enter a date range : Start date / End date.

Period of Interest	Select range from list or enter start and end dates
	Today
C	Last Week
Start date	This Month
	Last Month
End date	This Quarter
End dute	Last Quarter
	This Six Months
	Last Six Months
	This Year
	Last Year
	This Financial Year
	Last Financial Year

3. Click **Generate Report**. The following screen will be displayed.

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)				
Home	Reports Lists Referrals Custom Results				
Persons					
Days					
Cases	Period of Interest Last Month				
Reports	Start date 01/01/2015 mm				
Admin	End date 31/01/2015				
	Generate Report				
	Request Submitted				
<	This report may take a few minutes to run. The report will be displayed in the results tab. The report ID number is: 2066 Please delete the report when no longer of use.				

The report can be accessed from the **Results** tab using the report ID number (highlighted above).

11.3 Viewing Report Results

The **Results** tab allows you to view and delete reports generated through the Report tabs.

New reports are added at the bottom of the Results list.

Once reports are no longer needed, they should be deleted from the Results list (to keep it manageable).

supporting families	ASC Training 1 Advice, Refe	ASC Training 1 A Coordinator (Coordinator Advice, Referral and Case Management (ARC)								
Home	Reports Lists R	Reports Lists Referrals Custom Results								Menu
Persons										
Days	Display:	Display: My Reports								0
Cases	Report/List ID	Report/List ID Run By Processing Time			te Range	Workgroup	Туре	Included persons / Report Title	Acti	ons
Reports	Report 2066	A Coordinator	12/02/2019 15:31 0.315154 secs	From: To:	01/01/2019 31/01/2019	ASC Training 1	ARC Performance Report (ASC)		Delet: Repor	View Report
Admin	List 2067 12/02/2019 15:32	A Coordinator	12/02/2019 15:32 0.258136 secs	From: To:	01/01/2019 31/01/2019	ASC Training 1	ARC Performance List (ASC)		Delete List	View List
	Report 2068 12/02/2019 15:33	A Coordinator	12/02/2019 15:33 0.301285 secs	From: To:	01/01/2019 31/01/2019	ASC Training 1	OASIS Report (ASC)		Delete Report	View Report
	List 2069 12/02/2019 15:33	A Coordinator	12/02/2019 15:33 0.43257 secs	From: To:	01/01/2019 31/01/2019	ASC Training 1	OASIS List (ASC)		Delete List	View List

To view a report, click **View Report**. Depending on the report type, a screen similar to that below will appear.



- 1. To delete a report from the **Results** tab, simply click **Delete Report**.
- 2. A pop-up message will appear click **OK** to delete the report or **Cancel** to retain the report.

11.4 Exporting Report / List Results

Reports and Lists are able to be exported to Excel. This enables users to perform their own analysis of the data and to use it in other ways.

1 From the View Results screen, click the **Excel** icon

supporting families	ASC Training 1 Advice, Referral	A Co	ordinator (Coor	dinator) 🏟 🕩								
Home	Reports Lists Referral	Reports Lists Referrals Custom Results										
Persons	Back to Report Results List	Back to Panort Results List Delate this Report										
Days	Advice. Referrals and Ca	se Management (ARC)	ARC Performan	ce List (ASC) ID: 206	7 - for period 01/0	1/2019 to 31/01/2019.	1. This report	twas				
Cases	run at 12/02/2019 15:3 information. If you recei	2:46 and all data contain ved this report in error p						idential				
Reports												
Admin	ARC PERFORMANCE	E LIST (ASC)										
	Service Service O Name Numb	er Organisation	Service Type No.	Service Type	Service Type Name	Reporting Period Start Date	Reporting Pe Date	riod End				
	ASC Training	ASC Training 1	ASC	Assessment and Servic Connect	e ASC	01/01/2019	31/01/20	019				
	ASSESSMENT AND SERVICE CONNECT PERFORMANCE MEASURES 1. Service hours recorded (A01.1.06, A07.1.02) I&A Referral Family Response to ASC Note Direct / Activity Associated Contact Casework Travel Contact Worker I&A Referral Gate Surname referral Date Indirect type with time time time time Length											

2 At the bottom of your screen, a message will appear - select Open, Save or Cancel. Select as required, answer Yes to the format message that may appear - results are displayed in Excel.

700	Close	NO	01/00/2010	Deetroot	03/00/2010			
556 D	56 Do you want to open or save srsreport.xls from srs-qld-families-training.infoxchangeapps.net.au ?							

11.5 OASIS Report with counting rules

The **OASIS Report** reflects each of the performance measures for Assessment and Service Connect services, together with aggregating the details for Case Closures and referrals made during the reporting period (as documented within the *Families Investment Specification*).

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)							
Home	Reports List	Reports Lists Referrals Custom Results						
Persons	Back to Report	t Results	List Delete this Report					
Days	Advice, Refer immediatelv	rrals an and not	d Case Management (ARC). C tifv the sender.	ASIS Report ID: 2070. 1. This	report was run at	12/02/201	19 15:38:04	
Cases			,					
Reports	UASIS KEP	OKI						
	Sector Onder	Repo	rt Information					
Admin	Service Outlet	Nome:	ASC Training 1					
	Bariad Ecom	. Name:	ASC Training 1					
	Period To:		12/02/2019					
	Funding Area:		Families					
	Service Type I	No:	T448					
	Service Type:							
	PERFORMA	ANCE					_	
	Measure No.		1	Measure Name		Response		
	GM07	Number	r of Service Users with cases close	d as a result of majority of identifie	d needs being met	0	_	
	IS35	Number	r of Service Users identifying as Ab	original and/or Torres Strait Island	er	0	_	
	IS39	Number	r of Service Users identifying as be	ing from culturally and linguistically	/ diverse backgrounds	0	_	
	I5133	Number	r of existing Service Users			0	_	
	IS145	Number	r of Service Users who have exited	from the service		0		
	IS201	IS201 Number of referrals received				1		
	OUTPUTS Measure No.		Measure N	ame	Response			
	A01.1.06	Number	r of hours provided during the repo	orting period	0			
	A01.1.06	Number of Service Users who received a service during the reporting period 0						
	A07.1.02	Number of hours provided during the reporting period		orting period	0			
	A07.1.02	Number	r of Service Users who received a s	service during the reporting period	0			
	1070 0							
	IS/0 : Clos	SUIRE	and Referrals					
	CASE CEO.	JUKL	5	_		-		
	Referral pet a	contod	Clos	ure Reason		Res	o	
	Referral not at	conted -	- Other				0	
	Indirect servic	e only (r	no contact with family) (A07.1.02)				0	
	Indirect servic	e and in	itial contact with family only (A07.	1.02 and A01.1.06) – Family does r	not consent to further	contact	0	
	Indirect servic	e and in	itial contact with family only (A07.	1.02 and A01.1.06) - Further family	y contact not required		0	
	Early exit after	r initial c	ontact (A07.1.02 and A01.1.06) -	Unable to locate family			0	
	Early exit after	r initial o	ontact (A07.1.02 and A01.1.06) -	Family disengaged from ASC co-re	sponse		0	
	Early exit after	r initial o	ontact (A07.1.02 and A01.1.06) -	Family withdrew consent to an ASC	C co-response		0	
	Early exit after	r initial o	ontact (A07.1.02 and A01.1.06) -	ASC co-response deemed no longe	r appropriate		0	
	Direct and indirect service completed (A07.1.02 and A01.1.06) - ASC co-response completed						0	
	Direct and indirect service completed (A07.1.02 and A01.1.06) - Ongoing Statutory Intervention 0						0	
	Referrals Referred - Oth	Service her Child	Type Response and Family Support 1					
	OASIS Report Generated by A Security Classifi	Coordin ication (1	ator at 12/02/2019 15:38:04 In Confidence)					

The counting rules defined for each of the measures for Assessment and Service Connect services are detailed in the following tables.

** Understanding the ARC Performance Report and the OASIS Report

The ARC Performance Report and the OASIS Report are different reports that serve different purposes.

Table 1 of the ARC Performance Report (APR) looks directly to **Notes** as either Direct or Indirect type.

The Hours measures in the OASIS Report (A01.1.06 and A07.1.02) look to certain criteria relevant to the **Case**. Based on this criteria, it includes <u>all</u> Notes for that Case. These measures are not a correlation of *Direct* or *Indirect* as recorded on the Note.

Any discrepancy between the total time reflected in Table 1 of the *ARC Performance Report* and the total of time (A01.1.06 and A07.1.02) in the *OASIS Report* (for the same reporting period with both reports are generated at the same time) is likely to represent Notes with no Case attached. These can be identified as those Notes at the bottom of Table 1 in the *ARC Performance List* (with no Case details displayed).

<u>Important to note:</u> An *active Case Summary* is one where the *Response to ASC referral* is **Accepted** and the Case Summary is not closed.

Measure No.	Measure Name	Counting rule
GM07	Number of Service Users with cases closed as a result of majority of identified needs being met	Each Accepted Case Summary closed within the reporting period where > Outcome from initial family contact = Further family contact not required AND Reason further family contact is not required = Needs met at initial family contact OR > Outcome from initial family contact = Initial family consent received AND Case closure reason = ASC co-response completed.
1535	Number of Service Users identifying as Aboriginal and/or Torres Strait Islander	Each active Case Summary open at the end of the reporting period and closed within the reporting period where one or more person associated with the Case Summary identifies as Aboriginal, Torres Strait Islander or both.
1539	Number of Service Users identifying as being from culturally and linguistically diverse backgrounds	Each active Case Summary open at the end of the reporting period and closed within the reporting period where one or more person associated with the Case Summary has the Culturally and Linguistically Diverse flag (on their Person record) ticked
IS133	Number of existing Service Users	Each active Case Summary on the day before the start date of the reporting period.
IS145	Number of Service Users who have exited from the service	Each <i>Accepted</i> Case Summary closed within the reporting period.
IS201	Number of referrals received	Each Case Summary with a <i>Referral Date (for this service</i>) within the reporting period.

PERFORMANCE

... continued

OUTPUTS

Measure No.	Measure Name	Counting rule
A01.1.06	Number of hours provided during the reporting period	Sum the total minutes for unique* notes created within the specified period for each associated Case where: <i>Outcome</i> <i>from initial family contact</i> = Initial family consent received. Multiply by the number of workers* attached to the unique* note. *Unique Note : if a note is associated with a number of Persons, it is only counted once.
A01.1.06	Number of Service Users who received a service during the reporting period	Count Case Summaries that are open at the end of the reporting period + Case Summaries closed during the reporting period where: <i>Outcome from initial family contact</i> = Initial family consent received.
A07.1.02	Number of hours provided during the reporting period	Sum the total minutes for unique* notes created within the specified period for each associated case where: > Outcome from initial family contact = NA – Indirect service only OR > Outcome from initial family contact = Further family contact not required OR > Outcome from initial family contact = Family does not consent to further contact PLUS Sum the total minutes for unique* notes created within the specified period for each associated case where: Response to ASC Referral = Not Accepted OR is blank. Multiply by the number of workers* attached to the unique* note.
A07.1.02	Number of Service Users who received a service during the reporting period	Count Case Summaries that are <u>open</u> at the end of the reporting period where: > <i>Outcome from initial family contact</i> does <u>not</u> = Initial family consent received PLUS > those Case Summaries where <i>Response to ASC Referral</i> = Not Accepted PLUS Case Summaries <u>closed</u> during the reporting period where: > <i>Outcome from initial family contact</i> does <u>not</u> = Initial family consent received PLUS > those Case Summaries where <i>Response to ASC Referral</i> = Not Accepted.

12 Admin Page

The tabs within the **Admin** page allow users to manage their logon, email address and other details used within ARC.

Users with a Coordinator access level will have additional tab access to manage user accounts and perform other administrative functions as detailed in the Coordinator Functions section of this Manual.

12.1 Change Password

On the Admin Page, select the Password tab :

To change your password:

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)	A
Home	Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About	
Persons	Your reset key and security question have been validated. You may now reset your	8
Days	Please select a secure password. You should not disclose your password to other people. Current Password	
Cases	Passwords need to comply with the following rules: - Must contain at least 10 characters. New Password	
Reports	- Must contain at least 1 upper-case letter, 1 lower-case letter, 1 number and 1 symbol. - The allowed symbols are @ # \$ % ^ & * ():'/!=+\ ` ~ [] { };" <> ,?	
Admin	- It cannot be the same as your current password.	

- Enter your New Password, and enter again in the Confirm Password field.
 Passwords needs to be a minimum of 10 characters, contain 1 upper case, 1 lower case, 1 numeric character and 1 special character.
- 2. Click Save. Your password will now be updated.

Additional Note:

• When entering password details, an assessment of the password strength will be displayed. It is recommended that a password with a 'Strong!' strength level is entered.

12.2 User Preferences

The **Preferences** tab enables users to update their user account and contact details.

When logging on to ARC for the first time, users will be directed to the **Preferences** tab to update their Email Address, Security question **and** Security response.

This information is used for identification should users forget their passwords and wish to make use of the Password Resetting function. Alternatively, your ARC Coordinator will be able to reset passwords.

Details such as **Title**, **Position** and **Phone** may be used in some of the mail merge functions within ARC. The **Email address** is also used to send Microsoft calendar requests when creating Tasks.

Note: The Email address and Security question are mandatory.

supporting families	ASC Traini Advice,	^{ing 1} , Referra	al and (Case Ma	nagem	ient (/	ARC)	
Home	Password	Preferences	Finance	Bulk Action	s Users	Merge	Audit	Ten
Persons							8	
Days		Use	r preference	es successfully	undated			
Cases		000	a preference	is succession,	apaaccar			
Reports	User	Preference	es for A	Coordinat	or			
Admin	* Email	Address	worker@ascs	service.com				
		Phone						
		Mobile	0414123123					
		Fax						
		Title						
		Position	Feam Leader	r				
	Orga	anisation	amily Matte	ers Inc.				
	The security forget yo others.	rity question is ur password. I	used, toget t is stored in	her with your e encrypted for	email, to ide mat and car	entify you i nnot be rea	f you ad by	
	*	Security W question Security response	/hat are the	last five(5) cha	aracters of r	ny drivers	lice	
	Your email address recorded in SRS may be used by Infoxchange to communicate with you regarding scheduled SRS downtime, feature upgrades or tips on the effective uses of SRS. If you do not want Infoxchange to use your email for this purpose please tick the box below.							

You may be prompted by the following pop-up message :

Important: You must update your details. - A security question must be selected with a proper response. - An email address must be provided.	
	ОК

12.3 User Management

The **Users** tab within the **Admin** page provides access to the User Management functions – only available to those user with Coordinator access.

supporting	ASC - UAT Service	and Case Manag	amont (ADC)		Worker	Two (Coordinator)
ramiues	Advice, Referral	and Case Manac	ement (ARC)			= ¥ (7
Home	Password Preferences	Finance Bulk Actions U	Jsers Marge Audit	Templates Reference Data	About	Menu
Persons	Cluster ASC -	UAT Service 🗸				0
Days	Workgroup ASC -	UAT Service				
Cases	View Curren	t Users 🗸				
Reports						
Admin	Search	Go				
			Add new user			
	The ASC - UAT Service according to the currently have 10 spare use	ount is licensed for up to 20 na er licences.	med users. You			
	User Name †	User	Date Commenced	End Date	Last Logon	
	Central.User1	Rodney Crump	22/12/2015		07/02/2017	
	frameshni	Faraz Rameshni	24/09/2015		06/02/2017	
	gerard	Gerard Palk	01/07/2007		31/01/2017	
	glenden	Glenden Woodworth	08/07/2015		20/12/2016	

12.3.1 Creating a New User

There are **4 steps** required to create a New User in ARC. These are detailed below :

Step 1: Check for a spare licence:

ARC licences have been allocated to your service (Workgroup). Your allocation of licences is referred to in ARC as the total number of *named users*. When a user is allocated to a Workgroup, the number of spare licences for that Workgroup is reduced by one.

In the screenshot above, ASC - UAT Service has 20 named users and 10 spare licences. This means there are currently 10 allocated users.

If you have <u>no</u> spare licences, the first step is to review the list of **Current Users** and see if there's anybody on that list who is unnecessarily allocated to your workgroup and <u>Remove</u> them.

If you require additional licences, please contact the Assessment and Service Connect Program Team or your contract manager to discuss this requirement.

If you select *Non Current Users*, you can view users who no longer have access to your workgroup.

Step 2: Create a new User:

1. Click Add new user button and the Add new user form will open to the right of screen

supporting families	ASC - UAT Service Advice, Referral and Case Management (ARC)	Worker Two (Coordinator)
Home	Password Preferences Finance Bulk Actions Users Merge Audit Templates Reference Data About	Menu
Persons	Cluster ASC - UAT Service	0
Days		
Cases		
Reports		
Admin	Search Go	
	Add new user	
	The ASC - UAT Service account is licensed for up to 20 named users. You currently have 10 spare user licences.	

The Add new user: screen will display :

Add new user:				B
* User Name				
* First Name				
* Last Name				
Email Address			فر	
* Default Cluster	ASC - UAT Service	~		
Start Date	16/05/2018			
* New Password [
* Confirm Password [
User Blocked				
Change password				
Last Update	Save			

- 2. Enter the new **User Name** (User id). Please note that:
 - The User Name is case sensitive.
 - It is recommended that the naming convention of 'Firstname.Lastname' be followed. For example, if the user's name is John Smith, the new **User Name** should be 'John.Smith'.
 - The **User Name** can consist of letters, numbers, and the '-' (dash) and the '.' (dot) characters. No other characters or symbols are permitted.
- 3. Enter the First Name and Last Name.
- 4. Enter the **New Password** and re-enter the password in **Confirm Password**. The password must be at least ten characters in length and contain both letters and numbers.
- 5. Ensure that the **User Blocked** checkbox is <u>not</u> ticked.
- 6. Tick the **Change Password** checkbox this will force the user to change their password when they first log into ARC.
- 7. Click **Save**. The User account has been saved but there is a warning that the user has not been allocated to any Workgroup.

Edit user record	d:	
* User Name	Alan.Robinhood	
* First Name	Alan	
* Last Name	Robinhood	
Email Address	L.	
* Default Cluster	ASC - UAT Service	
Start Date	16/05/2018	
New Password		
Confirm Password		
User Blocked		
Change password		
A new user has bee workgro	en created. You must now add them to a oup to complete the process.	
Add to workgroup	Please select •	
Last Update Worker Two, ASC - UAT Service 16/05/2018 14:09:37		
	Save Remove User	

A User is not able to log into ARC until they have been allocated to a workgroup. Until they are allocated to a Workgroup, they are not using one of the licences. In this example, 10 spare licences will continue until this user has been allocated to a Workgroup.

Step 3: Allocate to a workgroup:

8. Select the required service from **Add to workgroup** drop-down list (highlighted below) and click **Save**.

Edit user record:	
* User Name Alan.Robinhood	
* First Name Alan	
* Last Name Robinhood	
Email Address	
* Default Cluster ASC - UAT Service	
Start Date 16/05/2018	
New Password	
Confirm Password	
User Blocked	
Change password	
A new user has been created. You must now add them to a workgroup to complete the process.	
Add to workgroup ASC - UAT Service 🔹]
Last Update Worker Two, ASC - UAT Service 16/05/2018 14:09:37 Save Remove User	

Additional Notes:

• If you did not have a spare licence, it is at this point, when you attempt to allocate a user to Workgroup, that you will receive the following error at the top of the form.

Sorry, you have reached your user limit. Please remove noncurrent users or contact Infoxchange to negotiate your user license arrangements.

Step 4: Allocate the access level:

The access level for the User will default to 'Normal User'.
 If 'Coordinator' access level is required, simply select this level from the list.
 Typically, most case workers will require 'Normal User' access level, with managers and team leaders using 'Coordinator'.

The difference between a Normal User and a Coordinator is illustrated in the following table:

Function	Normal	Coordinator
Create Client/ Person	1	1
Create Case Summary	1	1
Manage Case (notes, plans, documents, etc)	1	1
Delete notes, payments, plans, etc	x	1
Unlock Notes	x	1
Create/ Manage Referrals	1	1
Performance reporting – basic	1	1
Performance reporting – advanced	x	1
Merge Clients/ Persons	x	1
Auditing	x	1
Manage document templates	x	1
Manage Users	X	1



- 10. Where available, if the user needs access to another workgroup, make another selection from the **Add to workgroup** drop-down list and assign the required access level.
- 11. If the user is a manager who is not an 'operational' member of the workgroup, uncheck the **Operational** check box (highlighted below) so that their **User Name** does not appear in the 'worker' drop down lists throughout ARC. For the majority of users, this should remain checked.

12.3.2 Resetting a Password

To reset a user's password:

1. Open the **Edit user record** form by selecting the **User Name** from the list of Current Users.

Edit user record	d:	
* User Name	Alan.Robinhood	
* First Name	Alan	
* Last Name	Robinhood	
Email Address	د	
* Default Cluster	ASC - UAT Service	
Start Date	16/05/2018	_
New Password		
Confirm Password		
User Blocked		
Change password		
Workgroup Ro	le Operational Remove	
ASC - UAT Service No	ormal User 🔽 🗶 🗙	
Add to workgroup	Please select •)
Last Update	Worker Two, ASC - UAT Service 16/05/2018 14:12:24	
	Save	

- 2. Enter the **New Password** and re-enter the password in **Confirm Password**.
- Tick the Change Password checkbox (highlighted above) which will force the user to change their password the next time they log into ARC.
 Ensure the User Blocked checkbox is <u>not</u> ticked.
- 4. Click Save.
- 12.3.3 Unblocking a User Account

A user account may become blocked due to a number of consecutive incorrect password attempts or by lengthy account inactivity.

	Edit user rec	ord:		
	* User Nar	ne Alan.Robinhood		
	* First Nar	ne Alan		
	* Last Nar	ne Robinhood		
	Email Addre	ISS		<u> </u>
	* Default Clust	er ASC - UAT Serv	ice 🔽	
	Start Da	16/05/2018		
	New Passwo	rd		
	Confirm Passwo	ra		
<	User Block	ed 🔽		
	Change passwo	ord 🖵		
	Workgroup	Role	Operational R	emove
	ASC - UAT Service	Normal User 🔽	\checkmark	×
	Add to workgro	up Please select		•
	Last Upda	te Worker Two, ASC 16/05/2018 14:1	2 - UAT Service 2:24	
		Save		

The user account can be unblocked by simply <u>unchecking</u> the **User Blocked** check box (highlighted above) and clicking **Save**.

12.3.4 Removing User Access

When a staff member leaves your service, you have a choice as to how you manage their User record within ARC. The steps outlined below address the User management functions – <u>all records made by this User within ARC are retained</u>.

- 1. Open the **Edit user record** form by selecting the **User Name** from the list of Current Users.
- 2. Click the red cross to 'Remove'.

Edit user record:	3
* User Name Alan.Robinhood	
* First Name Alan	
* Last Name Robinhood	
Email Address	
* Default Cluster ASC - UAT Service	
Start Date 16/05/2018	
New Password	
Confirm Password	
User Blocked	
Change password	
Workgroup Role Operational Remove	
ASC - UAT Service Normal User 🔽 🔍 🗙	
Add to workgroup Please select	
Worker Two, ASC - UAT Service 16/05/2018 14:12:24	
Save	

This cancels the licence allocated to their record – however, their name remains in the Current User list.

A subsequent step is to remove their name from the **Current User** List. If you have a high turnover of Users, then choosing to remove them from the Current User List may be beneficial in keeping the List more manageable.

3. Click **Remove User**, as highlighted below.

Edit user record:	
* User Name Alan.Robinhood	
* First Name Alan	
* Last Name Robinhood	
Email Address	
* Default Cluster ASC - UAT Service	
Start Date 16/05/2018	
New Password	
Confirm Password	
User Blocked	
Change password	
The user is not in any workgroup.	
Add to workgroup Please select	
Last Update 16/05/2018 14:33:01	
Save Remove User	

To simply restrict access for a period of time, tick the **User Blocked** check box. The user will not be able to log in to ARC.

12.4 Merging Person Records

The **Merge** tab within the **Admin** page allows you to merge duplicate records for the same Person. For example, two workers may have individually created a Person record for a new client.

Prior to commencing the merge process, you should identify the 'primary' person record you want to keep and the 'secondary' person record you want to merge into the primary person record. When you merge the two person records, the demographic information will be retained for the primary person record but the demographic information contained in the secondary person record will be deleted.

12.4.1 To Search for duplicate records

On the **Admin** Page, **Merge** tab, the **Search Duplicates** sub-tab enables possible duplicate Person records (based on the Given Name, Family Name and Date of Birth fields) to be identified.

supporting families	ASC Training 1 Advice, Referral and Case Management (ARC)	A Coordinator (Coordinator)
Home	Password Preferences Finance Bulk Actions Users Merge Audit Templates Reference Data About	Menu
Persons	Merge Persons Search Duplicates	0
Days	Search for duplicate persons records:	
Cases	Match Threshold 3 (Possible Match) Records 50 V Search Result	
Reports	6 [Exact Match]	
Admin		

The **Match Threshold** field (displayed above) indicates the number of matching 'points' the Person records need to meet before they are selected and listed as possible duplicates. Matching occurs on the Given Name, Family Name and Date of Birth fields. Fuzzy name matching is also taken into consideration. A lower **Match Threshold** allows a less exact match.

The **Records** field indicates the maximum number of possible matches you would like returned for review.

To perform the possible duplicates search:

- 1. Select the required Match Threshold and Records values.
- 2. Click **Search** to perform the possible duplicates search. Any possible duplicate person records will be displayed.

supporting families	ASC - UA Advice	T Servi e, Ref	^{ce} erral	and C	ase Man	agem	ent (/	ARC)					Wo	rker Two (Coo	rdina Ö	ator)
Home	Password	Prefer	ences	Finance	Bulk Actions	Users	Merge	Audit	Templa	ates Refere	nce Data	About				Menu
Persons	Merge Per	sons Sea	arch Dup	licates												0
Days	Search for	duplica	te perso	ns record	s:		Coarch	Clope								
Cases	Match Three	shold 3	[Possible	Match] 🗸	Records 50		Search	Clear								-
Reports	Search Re	esuits:											n			
Admin													Potential D	uplicates: 2		
	View Per	son ID	Given Name †	Family Name	DOB	Alias?	Vi	ew Pers	on ID	Given Name	Family Name	DOB	Alias?	Match	Ν	4erge
	🛉 7	/834	Marg	Mango	12/04/198	5	•	7	835	Mark	Mango	04/04/198	35	3		Select
	🛉 7	810	Nigel	Pear	02/02/201	5	†	7	813	Nigel	Pear	01/01/200	01	4	0	Select

The results are presented with the two possible duplicate person records listed in the same row.

The number of matched 'points' between the two records is displayed on the right in the **Match** column.

This list can be exported to Excel by clicking the green icon in the bottom right corner.

3. Click on the blue person icon to open the Person>Details tab for that person record in a new browser tab. You can then easily navigate back to the possible duplicates list.

If you would like to merge the two suggested possible duplicate person records, click the blue **Select** link (highlighted above) to automatically populate the **Merge Persons** sub-tab with the selected records.

supporting families	ASC - UAT Serv Advice, Re	ASC - UAT Service Advice, Referral and Case Management (ARC)									
Home	Password Prefe	erences Finance	Bulk Actions	Users N	lerge Aud		lates	Reference Data	About		
Persons	Merge Persons Se	earch Duplicates									
Days	Primary Record	(details kept)		=	arrow (Merge) Record						
Cases		Refresh	New Search Go to	o Client			Re	efresh New Search	Go to Client		
Reports	ID	7810			ID	78	813				
Admin	Name	Nigel Pear			Name	Ni	igel Pea	ar			
	Gender	female			Gender	m	ale				
	Date of Birth	02/02/2015			Date of Bi	rth do	d/mm/2	2001 Year Estimated	l i i i i i i i i i i i i i i i i i i i		
	Indigenous Status	Not Indigenous			Indigenou Status	IS At	borigina	al			
	Country of birth				Country of	f birth					
	Language at Home				Language Home	at					
	Australian South Sea Islander	No			Australian Sea Island	i South No der	0				
	Ancestry				Ancestry						
	Centrelink CRN				Centrelink	CRN					
	Comments				Comments	5					
	Date of Death				Date of De	eath					
	Primary diagnosed disability				Primary diagnosed disability	1					
	Secondary				Secondary	,					
	diagnosed disability				diagnosed disability	i					
	ICMS ID				ICMS ID	78	87985Y				
	Last update	Worker Two, ASC 16/05/2018 14:55	- UAT Service 5:21 AEST		Last updat	te W	/orker T 6/05/20	wo, ASC - UAT Serv 18 14:55:50 AEST	rice		
	Addresses				Addresses	5					
	There are no regist	tered addresses			There are n	no registere	d addre	esses			
	Documents (note: No associated docu	s, alerts, etc) associ uments.	ated with this reco	ord	Document Workgroup	t s (notes, al	lerts, et	tc) associated with t Number	his record		
	Alias / Duplicate	s			ASC - UAT	Service		2			
	No associated alias	or duplicates.			Alias / Du	plicates					
					No associat	ted alias or	duplica	tes.			
					Validation	n Report					
					No conflictir No conflictir No conflictir No conflictir No conflictir No conflictir	ng Accommo ng Profiles / ng Support I ng Relations ng DSS Clie ng Group Mo	odation / Cases Periods ships nts embers	Periods			
								Мак	e Allas Merge		

You can then proceed to merge the records, as outlined in the following section.

Additional Notes

• If you have a large number of possible duplicate records returned, increase the **Match Threshold** to a higher level (such as 5 or 6) to make it easier to identify the more likely duplicate records so that these can be reviewed first.

12.4.2 To Merge two Person records

- On the Admin page, Merge tab, click the Merge Persons sub-tab. The Search for primary record form will appear on screen. Enter the First Name and/or Last Name of the primary person record. It is also recommended to click the Fuzzy search check box to display partial matches and to allow for incorrect spelling.
- 2. Click **GO** and a list of possible primary person records will be displayed.

supporting families	ASC - UAT Service Advice, Referral and Case Management (ARC)
Home	Password Preferences Finance Bulk Actions Users Merge Audit Templates
Persons	Merge Persons Search Duplicates
Days	Search for primary record:
Cases	Given Name
Reports	
Admin	Fuzzy
	GODlear
	Results
	ID Given Family Sex DOB Alias? Match Actions
	7991 Tina Tomato F 05/06/2013 O Open Select 7385 Tiny Tomato M 05/05/2013 O Open Select

If the records have the exact same client name, you can verify the primary and secondary record according to the Person ID, the unique system number for each person record.

Note: You can obtain the Person ID from the Primary Details for that Person.

3. When viewing the Primary Person record search results on the Merge tab, you can view the Person Details tab for the selected person record by clicking **Open**. Note that the Person **Details** tab will open in a new browser tab.

When you have finished reviewing the record close the tab and return to the **Merge** tab.

4. Click **Select** to confirm the primary Person record for the merge process. This is the record that will be kept. Once you click **Select**, details for the selected person record will be displayed to verify these are the details that will be kept as part of the merge process

supporting families	ASC - UAT Advice,	Service Referra	and C	Case Man	agem	ent (A	ARC)			
Home	Password	Preferences	Finance	Bulk Actions	Users	Merge	Audit	Templates	Reference Data	About
Persons	Merge Perso	ons Search Dup	licates							
Days	Primary Re	cord (details	kept)			Searc	h for sec	condary recor	rd:	
Cases			Refresh N	ew Search Go	to Client		Given N	lame Tin%		
Reports	ID	7991		ew Search 100			Family N	lame Tomato		
Admin	Name	Tina To	mato				Ge	ender 🔿 Male () Female	
	Gender	female					F	uzzy 🗌		
	Date of Birt	h 05/06/2	013					GO	Clear	
	Indigenous Status	Not Ind	igenous							
	Country of	birth								
	Language a Home	t								

If you need to modify any details on the primary person record, you can click the **Go to Client** button (see image above) to open the client's **Person Details** tab in another browser tab.

Once you have saved any changes in the **Person Details** tab, switch back to the current Merge process and click the **Refresh** button to update the primary person record information.

- 5. In the *Search for secondary record* form, enter the **Given Name** and/or **Family Name** of the secondary person record. These fields will have been defaulted from the search criteria entered in the primary search criteria. It is also recommended to click the **Fuzzy** search check box to display partial matches and to allow for incorrect spelling.
- 6. Click **GO** and a list of possible secondary person records will be displayed.
- 7. Click **Select** to confirm the secondary person record for the merge process. This is the record that will be merged into the primary person record.

supporting families	ASC - UAT Serv Advice, Re	_{ice} ferral and C	ase Mana	geme	ent (ARC	2)						١
Home	Password Prefe	rences Finance	Bulk Actions	Users	Merge	Aud	it Ter	nplat	es Refe	erence	Data	About	
Persons	Merge Persons Se	arch Duplicates											
Days	Primary Record	(details kept)			Sear	ch for	seconda n Name	Tin ⁰	cord:		7		
Cases		Refresh	ew Search Go to	o Client		Fami	lv Name	Tom	ato		5		
Reports	ID	7991					Gender		ale 🔿 Fem	nale			
Admin	Name	Tina Tomato					-	_		iuic			
	Gender	female					Fuzzy						
	Date of Birth	05/06/2013						GO	Clear				
	Indigenous Status	Not Indigenous			Resu	Ilts							
	Country of birth				ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Acti	ons
	Language at				7991	Tina	Tomato	F	05/06/20	13	0	Open	Select
	Home				7385	Tiny	Tomato	М	05/05/20	13	0	Ope	Select
	Sea Islander	No										_	

If you need to modify any details on the secondary person record, you can click the **Go to Client** button to open the client's Person Details tab in another browser tab. Once you have saved any changes in the Person Details tab, switch back to the current Merge process and click the **Refresh** button to update the secondary person record information.

- Carefully consider both records to ensure they relate to the same client.
 <u>Note</u>: in addition to merging the records, clicking Make Alias will also create an Alias record from the name and gender details of the secondary person record. For example, the Make Alias function would be used if you were merging two records where the person is known under different names (hence the accidental creation of a duplicate record for the person).
- 9. If you decide that you want to keep the Secondary person record and merge the Primary person record, you can swap the two records by clicking on the arrow icon between the Primary and Secondary forms.(See image below)

supporting families	ASC - UAT Sen	_{vice} Iferral and Case Manage	ment (ARC)	
Home	Password Prefe	erences Finance Bulk Actions Use	ers Merge Audit Te	emplates Reference Data About
Persons	Merge Persons S	earch Duplicates		
Days	Primary Record	(details kept)	Secondary (Mer	ge) Record
Cases		Refresh New Search Go to Clie	ent	Refresh New Search Go to Client
Reports	ID	7991	ID	7385
Admin	Name	Tina Tomato	Name	Tiny Tomato
, (0)	Gender	female	Gender	male
	Date of Birth	05/06/2013	Date of Birth	05/05/2013
	Indigenous Status	Aboriginal	Indigenous Status	Aboriginal
	Country of birth		Country of birth	
	Language at Home		Language at Home	
	Australian South Sea Islander	No	Australian South Sea Islander	No
	Ancestry		Ancestry	
	Centrelink CRN		Centrelink CRN	
	Comments		Comments	
	Date of Death		Date of Death	
	Primary diagnosed disability		Primary diagnosed disability	
	Secondary diagnosed disability		Secondary diagnosed disability	
	ICMS ID		ICMS ID	
	Last update	Worker Two, ASC - UAT Service 16/05/2018 15:13:13 AEST	Last update	Worker Two, ASC - UAT Service 16/05/2018 15:04:36 AEST
	Addresses		Addresses	
	There are no regis	tered addresses	There are no regis	tered addresses
	Documents (note No associated doc	s, alerts, etc) associated with this record uments.	Documents (note Workgroup	s, alerts, etc) associated with this record Number
	Alias / Duplicate	5	ASC - UAT Service	7
	No associated alia	s or duplicates.	Alias / Duplicate	5
			No associated alias	s or duplicates.
			Validation Repo	rt
			No conflicting Acco No conflicting Profil No conflicting Supp No conflicting Relat No conflicting DSS No conflicting Grou	mmodation Periods les / Cases oort Periods tionships Clients p Memberships
				Make Alia Merge

- 10. Click **Merge** to merge the secondary person record into the primary person record. (Please note that if the **Merge** button is not available, this will most likely be due to conflicting support period or profiles between the selected primary and secondary person records.)
- 11. An onscreen pop-up will ask "Are you sure you wish to merge these persons?" If you are sure you want to merge the records, click **OK** to confirm the merge.
- 12. Once the merge process has been completed, a confirmation message will be displayed indicating that the merge process was successful.



13. Be sure to go to the Merged record to ensure all the information is displaying as expected.

12.4.3 Reinstating Merged Records (Undo Merge)

After two Person records have been merged, you will be able to undo the merge process at a later date by first locating the person record via the **Search for primary record** form and then clicking the blue **Undo Merge** link (highlighted in image below).

ARC will remember what records have been merged and will separate the records back into the original two Person records. Please note that any new data/records attached to the Person record after the merge process will stay with the primary Person record if the merged records are unmerged at a later date.

supporting families	ASC - U Advic	AT Ser e, R€	_{vice} eferra	l and	Case Mar	nagem	ent (/	ARC)					
Home		d Pref			Bulk Action		Merge						
Persons	Merge Pe	ersons	Search Du	plicates									
Days	Primary	Record	l (details	kept)			Search for secondary record:						
Cases		11000110	- (alocome	Rofroch	Now Soarch	o to Client	Given Name						
Reports	ID		7001	Kenesh	New Search G	o to chent	Family Name						
Admin	Name		Tina T	omato				G	ender () Male(Female			
	Gender		female						Fuzzy 🗌				
	Date of I	Birth	05/06/	/2013					GO	Clear			
	Indigeno Status	ous	Aborig	inal									
	Country	of birth											
	Languag Home	e at											
	Australia Sea Isla	an Sout nder	h No										
	Ancestry	,											
	Centreli	ık CRN											
	Commen	its											
	Date of I	Death											
	Primary diagnose disability	ed V											
	Seconda diagnose disability	ry ed											
	ICMS ID												
	Last upd	ate	Worke 16/05/	r Two, ASC /2018 15:1	- UAT Service 3:13 AEST								
	Address	es											
	There are	no regi	stered ad	dresses									
	Docume No associ	n ts (not ated doo	es, alerts, cuments.	etc) assoc	iated with this n	ecord							
	Alias / D	uplicat	es										
	ID	Given Name	Family Name	Alias/ Duplicate	Last Update	\frown							
	7385	Tiny	Tomato		Worker 16/05 Fwo, 15:0 ASC - JAT Service	18Undo Merge ID(85)							

12.4.4 Deleting an Alias Record

If an alias record has been entered in error, it can be deleted via the Merge tab.

Locating the required person record via the **Search for primary record** form will list the person details including any current alias information. Click the blue **Drop Alias** link to delete the alias record that has been incorrectly entered or is no longer valid.

12.5 Bulk Actions

This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon ? to access SRS Help or review the SRS product user guides at the following url: <u>http://srs-support.infoxchangeapps.net.au/user-guides</u>

12.6 Templates

This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon 😨 to access SRS Help or review the SRS product user guides at the following url: <u>http://srs-support.infoxchangeapps.net.au/user-guides</u>

12.7 Finance

This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides or contact the Infoxchange HelpDesk.

12.8 Audit

This is standard functionality from the Infoxchange SRS product.

supporting families	ASC Training 1 A Coordinator (Coordinator) Advice, Referral and Case Management (ARC)
Home	Password Preferences Finance Bulk Actions Users Meige Audit Templates Reference Data About Menu
Persons	
Days	Person Views Person Updates Referral Views
Cases	From: 10/03/2018 From: 10/03/2018 Ferson ID: Vorker: Please select V Go
Reports	Audit Log
Admin	DESCRIPTION: Shows each time a person has been viewed NOTE: The Derson ID is a unique number assigned by the computer to each person or alias. To determine the Person ID open up the Person Details page and hover your
	mouse over the person's name in the Person/Alias list. Two numbers (usually the same) will be displayed (separated by a forward slash). The first of those numbers is the Person ID.

The Audit tab on the Admin page enables you to :

See users who have accessed a specific **Person** record.
 On the **Person Views** sub-tab, enter the **Person ID** with the relevant date range and click **Go**.
 You can select a specific worker or leave at Please select to see all users who have viewed that specific Person record.

supporting	ASC Training 1							A Coordinator (Coo	rdina	tor)
families	Advice, Referra	I and Cas	e Managem	ent (ARC)					Φ.	۲
Home	Password Preferences	Finance Bu	lk Actions Users	Merge Audit	Templates	Reference Data	About			Menu
Persons										
Days	Person Views Person Upd	ates Referral Vie	ews							
Cases	From. 10/05/2018	: 16/05/2018	Person ID: 3371	Worker:	Please select.	🗹 Go				_
Reports	Audit Log									
Admin	Date↓	Person ID	Given Name	e Family	Name	Alias/Duplicate	Worker	Workgroup		
	16/05/2018 14:37:28 AEST	3371	Carissa	Carro	t		A Coordinator	ASC Training	1	
	16/05/2018 14:34:54 AEST	3371	Carissa	Carro	t		A Coordinator	ASC Training	1	
	16/05/2018 12:54:13 AEST	3371	Carissa	Carro	t		A Coordinator	ASC Training	1	
	16/05/2018 12:20:46 AEST	3371	Carissa	Carro	t		A Coordinator	ASC Training	1	

See which users have updated Person records.
 On the **Person Updates** sub-tab, enter the **Person ID** or select a worker name and click **Go**.

supporting families	ASC Training 1 Advice, Re	ferral and (Case Mana	igement (AF	RC)		A	Coordinator (Coordinator)
Home	Password Prefe	rences Finance	Bulk Actions	Users Merge A	udit Templates	Reference Data	About	Menu
Persons								· ·
Days	Person View Per	son Updates Referra	al Views					
Cases	Start Date 16/05/	EOLV and End Date	16/05/2018	Person Id	Worker A Coor	rdinator 🔽 Go		
Reports	Search Results							
Admin	Date↓	Person Id	Given Name	Family Name	Alias	Action	Worker Id	Last Update By
	16/05/2018 14:35:37	3374	Karissa	Carrot		INSERT	102	A Coordinator, ASC Training 1
	16/05/2018 11:26:22	3373	Crystal	Carrot		INSERT	102	A Coordinator, ASC Training 1
	16/05/2018 11:25:48	3372	Charles	Carrot		INSERT	102	A Coordinator, ASC Training 1
	16/05/2018 11:25:20	3371	Carissa	Carrot		INSERT	102	A Coordinator, ASC Training 1
				1	to 4 of 4 results			2
	NOTE: The Perso mouse over the	n ID is a unique num person's name in th	DES ober assigned by t e Person/Alias list	CRIPTION: Shows of the computer to each . Two numbers (usual	hanges made to per person or alias. To o ly the same) will be the Person ID.	rson details form data determine the Person I displayed (separated	D open up the Person I by a forward slash). Th	Details page and hover your le first of those numbers is

See which users have viewed referrals. On the Referral Views sub-tab, enter the Person ID or select a worker name and click Go.

supporting families	ASC Training 1 A Coordinator (Coordinator) Advice, Referral and Case Management (ARC)
Home	Password Preferences Finance Bulk Actions Users Merge Audit Templates Reference Data About Menu
Persons	
Days	Person Views Person Updates Referral Views
Cases	From: 16/05/2018 IIII 16/05/2018 IIII Person ID: Worker: A User Go
Reports	Audit Log
Admin	No matches to your search.
	DESCRIPTION Shows each time a referral has been viewed. Specify by person and/or worker NOTE: The Person ID is a unique number assigned by the computer to each person or alias. To determine the Person ID open up the Person Details page and hover your mouse over the person's name in the Person/Alias list. Two numbers (usually the same) will be displayed (separated by a forward slash). The first of those numbers is the Person ID.

The results are able to be exported to Excel for further analysis or copied to a pdf document, as required, by selecting the relevant icon in the bottom right corner.

For additional guidance on using this feature, contact the Infoxchange HelpDesk.

12.9 Reference Data

This tab details the reference sets available for user editing. This is not applicable for ARC.

12.10 About

The **About** tab contains specific information about your connection to ARC as part of the Infoxchange Service Record System (SRS) suite of products.

You may be asked to access this data to assist the Infoxchange HelpDesk address queries or issues you may be experiencing.

13 ARC Support

13.1 How do I....?

This **User Manual** and the **Training Guide** have been prepared to assist you with getting to know the functionality available within ARC.

Refer to these helpful documents as your first point of reference for assistance.

The User Manual can be accessed from the **Need Help Using ARC?** section on the ARC landing (login) page.

13.2 Technical Support

Infoxchange provide a HelpDesk service for users of their products. (ARC is based on their SRS product.)

If you experience any technical problems with ARC, please contact Infoxchange HelpDesk :

- on 1300 366 516 or (03) 9418 7487
- or email srs-support@infoxchange.net.au

When you contact the Infoxchange HelpDesk, please quote the web address you use to access ARC and the workgroup that you belong to.

SRS Support is also available via the SRS Online Help website.

13.3 Online Help

Online help accessed from within ARC is generic for the SRS product.

The question mark icon is found throughout ARC. It appears under the Menu tab on every page and on edit panel. Clicking this icon will open a new tab at the Online Help topic relevant to where you clicked.

The topics within this Training Guide offer assistance to the particular functionality within ARC.

13.4 Practice Support

This manual provides the user with information on how to access and use the Advice, Referrals and Case Management (ARC) system for managing work within your Assessment and Service Connect service.

For any queries regarding matters of practice, please direct these to the Operational Policy Program Team via your contract manager.

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