



Aboriginal and Torres Strait Islander Family Participation Program

Advice, Referrals and Case Management (ARC) system

User Manual

September 2019

This manual provides the user with information on how to access and use the Advice, Referrals and Case Management system for Family Participation Program services.

DISCLAIMER

This User Manual reflects the functionality of the system as at September 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 Family Participation Program (FPP) services to manage their work in supporting Aboriginal and Torres Strait Islander families participate in child protection decisions that affect them – empowering families in decision-making processes and activating appropriate support networks for the safety and wellbeing of Aboriginal and Torres Strait Islander children within family, community and culture. ARC streamlines the capture of reliable data to generate reports for operational management and performance evaluation.

Throughout this manual, those data fields which are critical for reporting 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 <https://srs-qld-families.infoxchangeapps.net.au> 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 any software updates or system outages

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

The screenshot shows the ARC login interface. At the top left is the 'supporting families' logo. At the top right is the 'Infoxchange' logo. The main content area is divided into several sections:

- Advice Referrals and Case Management** (blue background): This database contains private and confidential information. Access to this information is subject to State privacy legislation. Only authorised persons should access this database. You should not give your username and password to any other person. Please keep your password secret. All access to this application is logged and is subject to regular audits.
- Login to your account** (red box): A login form with fields for 'Username' and 'Password', a 'Forgot your password?' link, and a 'Sign in' button.
- About ARC** (bottom left): A section describing the ARC system, its purpose, and how to access it.
- News** (bottom middle, red box): A section titled 'What's new for you - December news' providing updates on system changes, a 'SPECIAL ALERT' regarding referrals, and an 'IMPORTANT NOTICE' about the Contact Report. It also includes a section for 'Are you up-to-date with...' and 'For your reference:'.
- Need help using ARC?** (bottom right, red box): A section providing contact information for support, including a helpline, email, and website.

1.2 Logging in for the first time

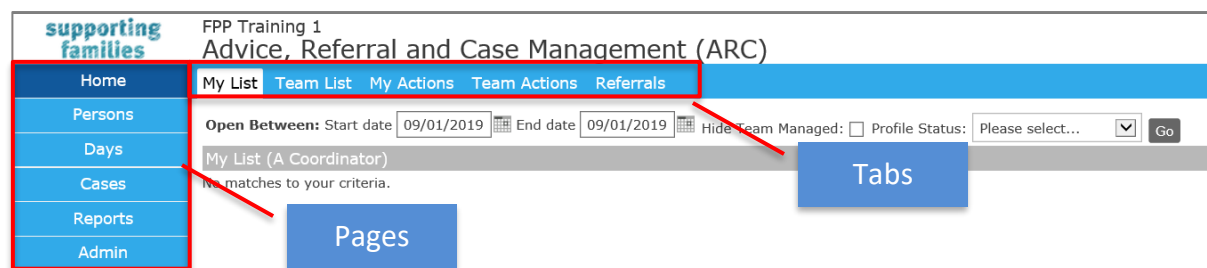
When you log in for the first time, you will be asked to change your password. We recommend that you change your password to something easy to remember.

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

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 [User Preferences](#) 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 :

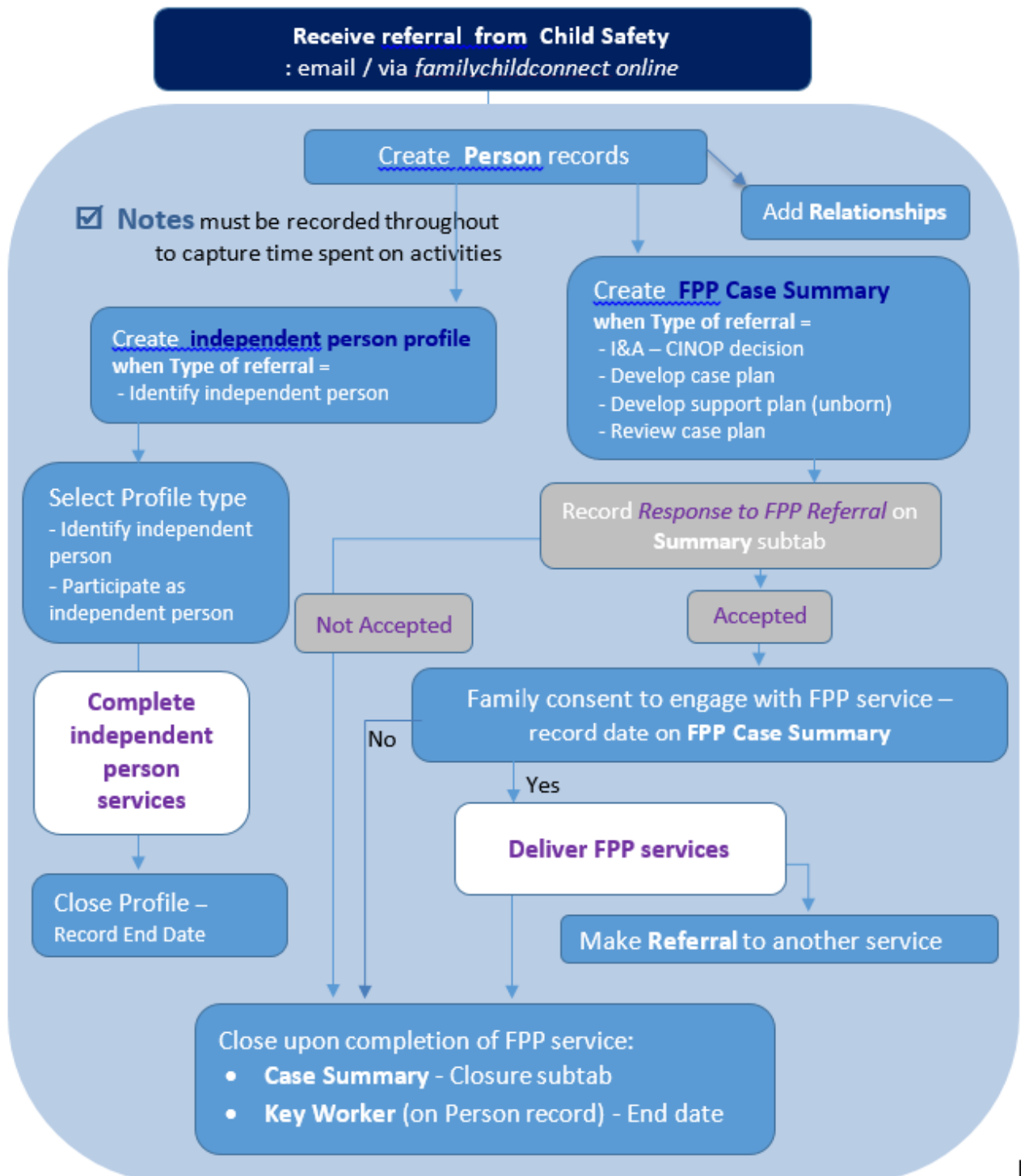
- Pages – 6 options on the left-hand side
- Tabs – appear across the top for each Page
- Workspace area – the central area.

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

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 in ARC (start to finish) for managing your work supporting Aboriginal and Torres Strait Islander families participate in child protection decisions that affect them.



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

supporting families FPP Training 1
Margerie Mandarin Female, DOB: 21/04/1980 (Age 38 yrs)

Home Search Details Notes Supports Alerts Referrals Plans Tasks Documents

Persons Days Cases Reports Admin

Recent List Margerie Mandarin

View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Margerie Mandarin	Primary Name	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Mark Mandarin	Son	20/01/2010	

Profiles: Create new profile

No profiles exist

Cases: Create new Case View Prior

No current Cases exist

Address: Create new address

Street	Locality	Type	Comments	Last Update
45 Pelican Drive	BOWEN QLD 4805	Home		14/01/2019

Phone & other contacts: Create new econtact

Contact	Type	Comments	Last Update
0410667667	Mobile		14/01/2019

Screenshot 2

supporting families FPP Training 1
Margerie Mandarin Female, DOB: 21/04/1980 (Age 38 yrs)

Home Search Details Notes Supports Alerts Referrals Plans Tasks Documents

Persons Days Cases Reports Admin

Recent List Margerie Mandarin

View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Margerie Mandarin	Primary Name	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Mark Mandarin	Son	20/01/2010	

Profiles: Create new profile

No profiles exist

Cases: Create new Case View Prior

No current Cases exist

Prior Case

Description	Role	Workgroup	Start	End
FPP Case Summary	Primary Carer	FPP Training 1	10/12/2018	21/12/2018

Address: Create new address

Street	Locality	Type	Comments	Last Update
45 Pelican Drive	BOWEN QLD 4805	Home		14/01/2019

Phone & other contacts: Create new econtact




Contact	Type	Comments	Last Update
0410667667	Mobile		14/01/2019

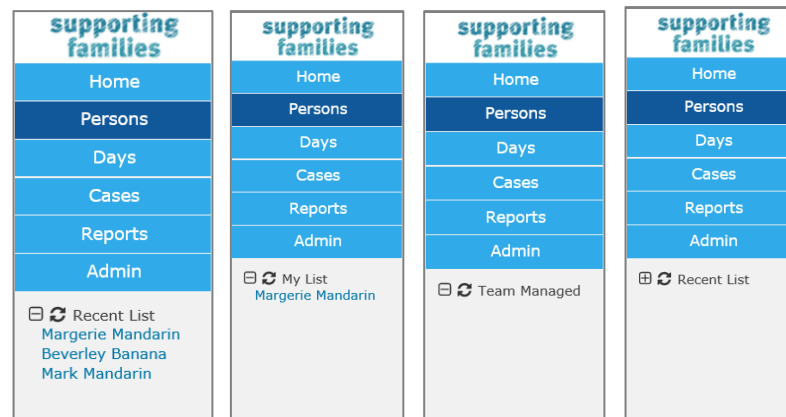
1.5 Toggle for access to Person records

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.

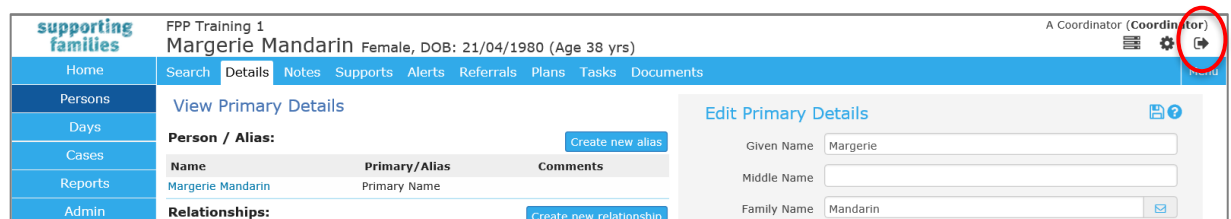
Simply ...

- click the toggle icon  to select your required display
- click on the blue name to open that Person record
- click the box  to expand or  to hide records displayed.



1.6 Logging off

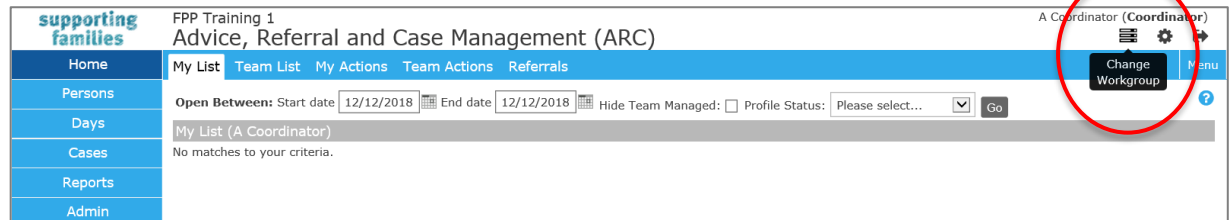
Log off via the log out icon  on the top at the far right of the screen. Simply click to log out. Users should log out as soon as they have completed their work within ARC.



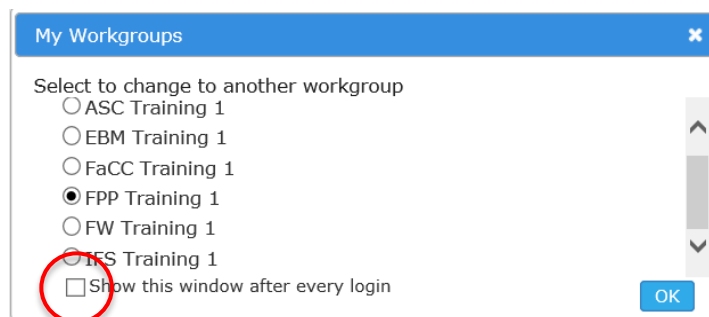
1.7 Access to more than one workgroup

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.



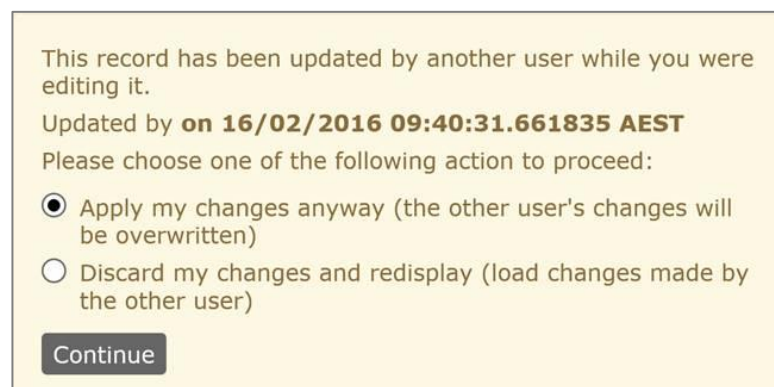
The workgroup options you have available will display. Simply select the radio button for the required workgroup and click OK.



It is recommended you 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:



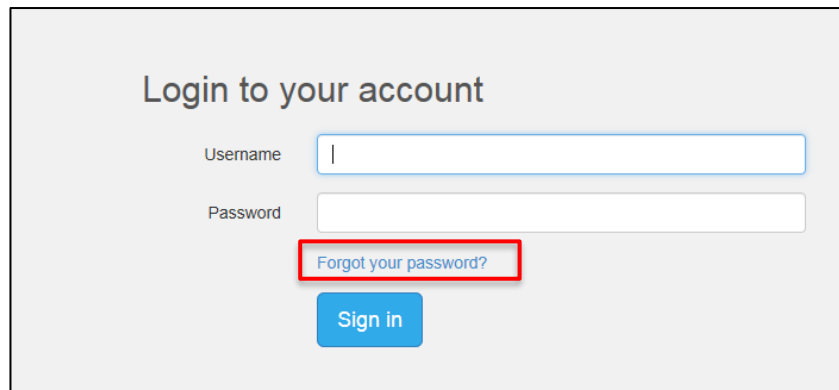
Select the required option and **Continue**.

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 your account

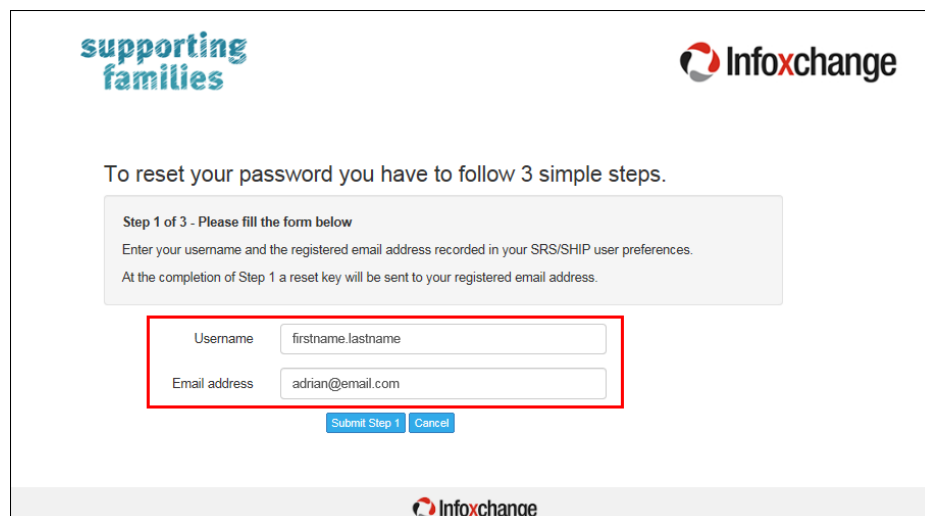
Username

Password

[Forgot your password?](#)

[Sign in](#)

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



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

Step 1 of 3 - Please fill the form below

Enter your username and the registered email address recorded in your SRS/SHIP user preferences.
At the completion of Step 1 a reset key will be sent to your registered email address.

Username

Email address

[Submit Step 1](#) [Cancel](#)

Infoxchange

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

3. 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

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

Step 2 of 3 - Please fill the form below

An email was sent to you with your reset key. If you do not receive the email, check the junk / spam folder in your email program.

Enter the reset key in the form below and enter your response to the security question. This must match the response you entered in your user preferences.

Note: If there is no security question below you have not completed your preferences and will not be able to use this password reset function. Please contact your administrator or contact SRS Support.

Reset Key

Security Question What are the last five(5) characters of my drivers license?

Security Response

[Submit Step 2](#) [Cancel](#)

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**

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

Step 3 of 3 - Enter your new password

Your reset key and security question have been validated. You may now reset your password. Please select a secure password. You should not disclose your password to other people.

Passwords need to comply with the following rules:

- Must contain at least 8 characters.
- Must contain at least 1 upper-case letter, 1 lower-case letter and 1 number.
- It cannot be the same as your current password.

New password

Confirm password

[Submit Step 3](#) [Cancel](#)

5. Select **Login Page** and enter your new password.

supporting families **Infoxchange**

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

Your password was changed successfully!!

[Login page](#)

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 FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home **My List** Team List My Actions Team Actions Referrals Menu

Persons Open Between: Start date 12/12/2018 End date 12/12/2018 Hide Team Managed: ☐ Profile Status: Please select... Go

Days My List (A Coordinator)

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
Peter	Potato		12/12/2018				0		No

1 to 1 of 1 results

* Includes all recorded contacts with FPP Training 1 (does not include file notes).

Recent List
Bev Banana
Peter Potato

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 FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home My List **Team List** My Actions Team Actions Referrals Menu

Persons Open Between 12/12/2018 and 12/12/2018 Key Worker Please select... Show Last worker ☐ Alerts ☐ Profile Status Please select... Go

Days My Team List (FPP Training 1)

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
A Coordinator	Peter	Potato		12/12/2018				0		No
G User	Bev	Banana		12/12/2018				0		No

1 to 2 of 2 results

* Includes all recorded contacts with FPP Training 1 (does not include file notes).

Recent List
Bev Banana
Peter Potato

The following options can be used to customise your view:

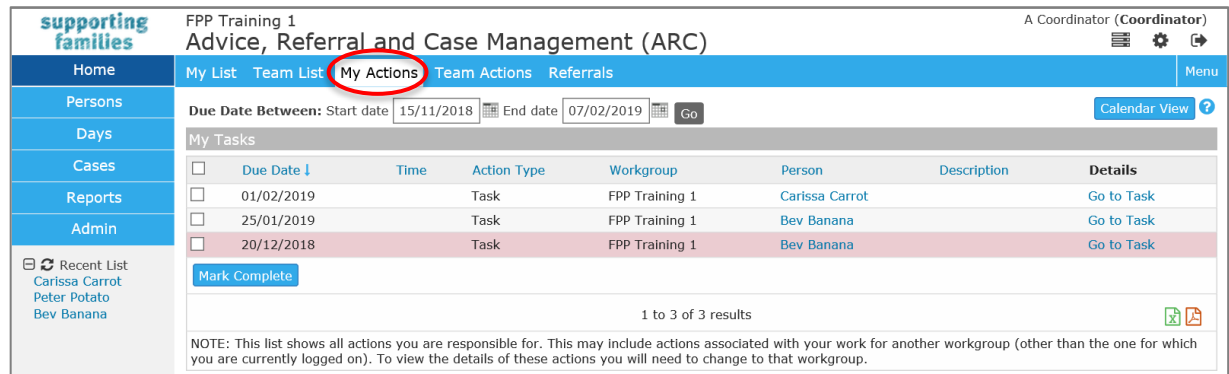
- By clicking the calendar icon and altering the displayed date range you can filter data by date.
- You can show additional details such as **Last Worker**, existing **Alerts** and **Profile Status** by clicking the options at the top of the form.
- To sort the list of Persons, click on the **Worker 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 FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home My List Team List **My Actions** Team Actions Referrals Menu

Persons Due Date Between: Start date 15/11/2018 End date 07/02/2019 Go Calendar View ?

Days My Tasks

<input type="checkbox"/>	Due Date ↓	Time	Action Type	Workgroup	Person	Description	Details
<input type="checkbox"/>	01/02/2019		Task	FPP Training 1	Carissa Carrot		Go to Task
<input type="checkbox"/>	25/01/2019		Task	FPP Training 1	Bev Banana		Go to Task
<input type="checkbox"/>	20/12/2018		Task	FPP Training 1	Bev Banana		Go to Task

Mark Complete

1 to 3 of 3 results

NOTE: This list shows all actions you are responsible for. This may include actions associated with your work for another workgroup (other than the one for which you are currently logged on). To view the details of these actions you will need to change to that workgroup.

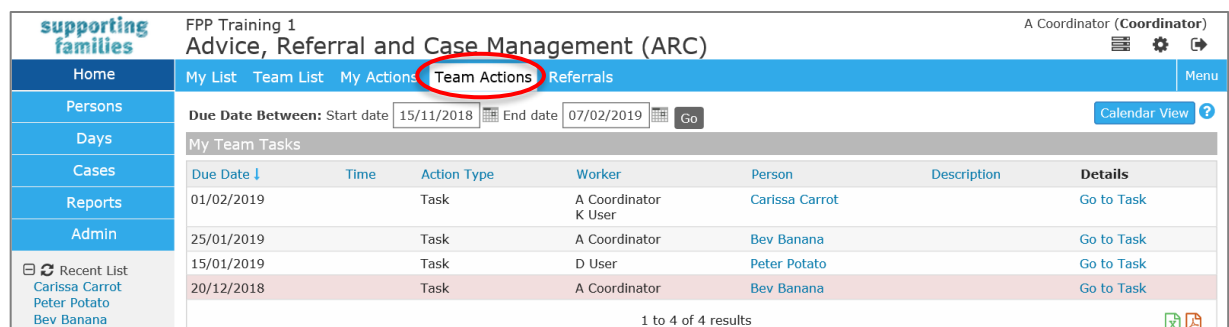
The following options can be used to customise your view:

- 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 FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home My List Team List My Actions **Team Actions** Referrals Menu

Persons Due Date Between: Start date 15/11/2018 End date 07/02/2019 Go Calendar View ?

Days My Team Tasks

<input type="checkbox"/>	Due Date ↓	Time	Action Type	Worker	Person	Description	Details
<input type="checkbox"/>	01/02/2019		Task	A Coordinator K User	Carissa Carrot		Go to Task
<input type="checkbox"/>	25/01/2019		Task	A Coordinator	Bev Banana		Go to Task
<input type="checkbox"/>	15/01/2019		Task	D User	Peter Potato		Go to Task
<input type="checkbox"/>	20/12/2018		Task	A Coordinator	Bev Banana		Go to Task

1 to 4 of 4 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.

The screenshot displays the 'FPP Training 1' interface for 'Advice, Referral and Case Management (ARC)'. The user is logged in as 'A Coordinator (Coordinator)'. The left sidebar contains a 'Recent List' with entries 'Bev Banana' and 'Margerie Mandarin'. The main content area shows the 'Search' tab selected, with search criteria set to 'Name' and 'Fuzzy' search enabled. The search results section is currently empty.

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 because of the variety in the way people spell names. For example a search of 'Doe' will also pick up 'Dough'.

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. For example, %son in the *Family name* field will return a list of all persons whose Surname ends in 'son'.

Some example wildcard searches include:

- %son will search for names ending in "son"
- Will% will search for names starting with "Will"
- %tin% will search for names with "tin" somewhere in the name, including at the beginning or end.

3.2 Add a Person

1. On the **Persons** page, **Search** tab, enter the criteria for the person you are searching for. You are strongly encouraged to shorten the name and use the wildcard (% or *) when searching. Click **Search**.

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'A Coordinator (Coordinator)'. The page title is 'FPP Training 1 Advice, Referral and Case Management (ARC)'. The left sidebar has a 'Persons' tab selected. The main area is the 'Search' tab. The 'Search By' section has 'Name' selected. The 'Given name' field is empty, and the 'Family name' field contains 'Car%'. The 'Search' button is circled in red. Below the search fields, the 'Search Results' table shows one result: Thomas Carter, Male, DOB 11/09/1991, Match 3. The 'Add new Person' button at the bottom is also circled in red.

Given Name	Family Name	Sex	DOB	Alias?	Match ↑
Thomas	Carter	Male	11/09/1991		3

1 to 1 of 1 results

For this example, the search is for *Carissa Carrot* – simply shorten the name and add the wildcard.

The Search Results do not display an existing records for Carissa Carrot.

Alternatively, you could include the initial for the Given name, as below

The screenshot shows the same 'supporting families' web application interface. The 'Given name' field now contains 'C%' and the 'Family name' field still contains 'Car%'. The 'Search' button is circled in red. Below the search fields, the 'Search Results' section displays the message 'No matches to your search.' The 'Add new Person' button at the bottom is also circled in red.

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

Given Name

Middle Name

Family Name

*Sex ☐ Male ☒ Female ☐ Intersex ☐ Unknown

Date of Birth
☐ year estimated

*Identifies as ☒ Aboriginal
☐ Torres Strait Islander
☐ Both
☐ Neither
☐ Unknown
☐ Unspecified

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

Last Updated

Save

For recording *Identifies as*,

Unknown – the person does not know their status

Unspecified – the person does not wish to specify their 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.

ARC User Manual for Family Participation Program

supporting families FPP Training 1 Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs) A Coordinator (Coordinator)

Home Search Details Notes Supports Alerts Referrals Plans Tasks Documents

Persons View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	

Relationships: Create new relationship

No relationship exists

Profiles: Create new profile

No profiles exist

Cases: Create new Case

No Cases exist

Address: Create new address

No address exists

Phone & other contacts: Create new econtact

No contacts exist

Key Workers: Create new key worker

This person has no assigned key workers

Restriction Export Details Refresh

Edit Primary Details

Given Name: Carissa

Middle Name:

Family Name: Carrot

*Sex: ☐ Male ☒ Female ☐ Intersex ☐ Unknown

Date of Birth: 21 04 1990
☐ year estimated

*Identifies as: ☒ Aboriginal
☐ Torres Strait Islander
☐ Both
☐ Neither
☐ Unknown
☐ Unspecified

Identifies as: ☐ Australian South Sea Islander

Country of birth:

Preferred Language:

☐ Culturally and Linguistically Diverse

Comments:

Primary diagnosed disability: ☐

Secondary diagnosed disability: ☐

Person Identifier 6378

ICMS ID:

Date of Death: DD/MM/YYYY (dd/mm/yyyy)

Last Updated: A Coordinator, FPP Training 1 14/01/2019 08:48:46 AEST

Person Identifier / Person ID :

The system-generated **Person Identifier** can be found on the [Edit Primary Details](#) form, as shown above, or by hovering over the Person name on the **Details** tab, as shown below.

supporting families FPP Training 1 Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)

Home Search Details Notes Supports Alerts Referrals Plans Tasks Do

Persons View Primary Details

Person / Alias: Create new alias

ID:6378/6378	Primary/Alias	Comments
Carissa Carrot	Primary Name	

Relationships: Create new relationship

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

3.3 Create Alias

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

The screenshot shows the 'Add New Alias' form on the 'Details' tab for Carissa Carrot. The form is titled 'Add New Alias' and includes fields for Given Name, Middle Name, Family Name, Preferred Name (checkbox), *Sex (radio buttons for Male, Female, Intersex, Unknown), Date of Birth (dd, mn, yyyy), and a checkbox for 'year estimated'. There is also a 'Comments' text area and a 'Last Updated' field. A 'Save' button is at the bottom right. The 'Create new alias' button in the 'Person / Alias' table is circled in red.

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**.

The screenshot shows the 'Edit Alias Details' form on the 'Details' tab for Carissa Carrot. The form is titled 'Edit Alias Details' and includes fields for Given Name (Carrie), Middle Name, Family Name, Preferred Name (checkbox, checked), *Sex (radio buttons for Male, Female, Intersex, Unknown), Date of Birth (dd, mn, yyyy), and a checkbox for 'year estimated'. There is also a 'Comments' text area and a 'Last Updated' field. A 'Save' button is at the bottom right. The 'Carrie' alias name in the 'Person / Alias' table is circled in red.

3.4 Create Relationships

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

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'FPP Training 1' (A Coordinator). The main header displays 'Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)'. The left sidebar contains navigation links: Home, Persons, Days, Cases, Reports, Admin, and a Recent List. The main content area is titled 'View Primary Details' and includes sections for 'Person / Alias', 'Relationships', 'Profiles', and 'Cases'. The 'Relationships' section has a 'Create new relationship' button circled in red. The right sidebar contains a 'Search for related person' form with fields for Given name, Family name, Sex, and Fuzzy search, along with 'Go' and 'Clear' buttons.

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

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'FPP Training 1' (A Coordinator). The main header displays 'Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)'. The left sidebar contains navigation links: Home, Persons, Days, Cases, Reports, Admin, and a Recent List. The main content area is titled 'View Primary Details' and includes sections for 'Person / Alias', 'Relationships', 'Profiles', 'Cases', 'Address', and 'Phone & other contacts'. The 'Relationships' section has a 'Create new relationship' button. The right sidebar contains a 'Search for related person' form with fields for Given name (Char%), Family name (Car%), Sex (Male, Female, Intersex, Unknown), and Fuzzy search, along with 'Go' and 'Clear' buttons. The 'Results' section shows 'No match to your search.' and a tip about using wildcards. The 'Add new person' button is circled in red.

3. Complete record as outlined in the preceding section [Add a Person](#) . Click **Save**.
4. The **Edit Relationship** form will display.

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'FPP Training 1' (A Coordinator). The main header displays 'Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)'. The left sidebar contains navigation links: Home, Persons, Days, Cases, Reports, Admin, and a Recent List. The main content area is titled 'View Primary Details' and includes sections for 'Person / Alias', 'Relationships', 'Profiles', and 'Cases'. The 'Relationships' section has a 'Create new relationship' button. The right sidebar contains an 'Edit Relationship' form with fields for Related person (Charles Carrot), is Carissa Carrot's (dropdown), Start Date (14/01/2019), End Date (dd/mm/yyyy), Comments, and Last update, along with 'Save' and 'Print View' buttons. The 'Add new person' button is circled in red.

- 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).

Edit Relationship

Related person: Charles Carrot

Is Carissa Carrot's: **Husband**

Start Date:

End Date:

Comments:

Last update:

[Print View](#)

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

supporting families FPP Training 1

Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)

Home Search **Details** Notes Supports Alerts Referrals Plans Tasks

Persons **View Primary Details**

Days

Cases

Reports

Admin

Recent List: Carissa Carrot, Charles Carrot, Bev Banana, Margerie Mandarin

Person / Alias: [Create new alias](#)

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Carrie	Alias (Preferred)	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Charles Carrot	Husband	02/06/1984	

Profiles: [Create new profile](#)

No profiles exist

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

supporting families FPP Training 1

Charles Carrot Male, DOB: 02/06/1984 (Age 34 yrs)

Home Search **Details** Notes Supports Alerts Referrals Plans Tasks

Persons **View Primary Details**

Days

Cases

Reports

Admin

Recent List: Charles Carrot, Carissa Carrot

Person / Alias: [Create new alias](#)

Name	Primary/Alias	Comments
Charles Carrot	Primary Name	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Carissa Carrot	Wife	21/04/1990	

If you click the relationship value displayed, 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. The **Primary Details** for that Person displays on the right of your screen.

supporting families

FPP Training 1

A Coordinator (Coordinator)

Home

Persons

Days

Cases

Reports

Admin

Recent List

- Carissa Carrot
- Charles Carrot
- Bev Banana

Search

Details

Notes

Supports

Alerts

Referrals

Plans

Tasks

Documents

Carissa Carrot

Female

DOB: 21/04/1990 (Age 28 yrs)

View Primary Details

Person / Alias:

Create new alias

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Carrie	Alias (Preferred)	

Create new relationship

Person	Relationship	DOB	Comments
Charles Carrot	Husband	02/06/1984	

Edit Primary Details

Given Name

Carissa

Middle Name

Family Name

Carrot

*Sex

☐ Male

☒ Female

☐ Intersex

☐ Unknown

Date of Birth

21

04

1990

☐ year estimated

3.5 Create Profile

There are two Profiles available – click the drop-down arrow:

- **Child Profile** and
- **independent person**.

The screenshot shows the 'supporting families' interface. At the top, it says 'FPP Training 1' and 'Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)'. Below this is a navigation bar with tabs: Home, Search, Details (selected), Notes, Supports, Alerts, Referrals, Plans, Tasks, Documents. On the left is a sidebar with a 'Recent List' containing names like Carissa Carrot, Charles Carrot, Bev Banana, and Margerie Mandarin. The main area is titled 'View Primary Details' and shows 'Person / Alias' information for Carissa Carrot, including her primary name and an alias 'Carrie'. There are buttons for 'Create new alias' and 'Create new relationship'. Below this is a 'Relationships' table with columns for Person, Relationship, and DOB, showing Charles Carrot as the husband. At the bottom, it says 'Profiles: No profiles exist' with a 'Create new profile' button. On the right, there is a 'Create new profile' button and a dropdown menu for 'Profile type' which is currently open, showing 'Child Profile' and 'independent person' as options.

3.5.1 Child Profile

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

These records are not included in any departmental reporting.

The screenshot shows the 'Child Profile' form. It has three tabs: 'Education / Care' (selected), 'Child Protection', and 'Issues'. Under the 'Education / Care' tab, there is a 'Level' section with radio button options: 'Childcare / Kindergarten', 'Prep', 'Primary school', 'Secondary school', 'Not enrolled in childcare/kindergarten', and 'Not enrolled in Prep/School'. Below this is a 'Details' field. There are also fields for '*Start Date' (12/12/2018), 'End Date', and 'Last update'. A 'Save' button is at the bottom.

3.5.2 independent person

The **independent person** Profile is used when:

- your service receives a request/referral from Child Safety *to identify an independent person* (in relation to a family matter) and
- when your service/staff member *is engaged as the independent person*.

For details about using this Profile, refer to **Section 4** of this Manual.

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.

The screenshot shows the 'supporting families' web application interface. The top navigation bar includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Referrals', 'Plans', 'Tasks', and 'Documents'. The left sidebar lists 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area is titled 'View Primary Details' for 'Carissa Carrot' (Female, DOB: 21/04/1990, Age 28 yrs). It contains sections for 'Person / Alias', 'Relationships', 'Profiles', 'Cases', 'Address', 'Phone & other contacts', and 'Key Workers'. The 'Address' section has a 'Create new address' button circled in red. To the right, the 'New Address Details' form is visible, with fields for Street, Suburb, State (QLD), Postcode, Country (Australia), and Comments. It also includes checkboxes for 'Safety Issues', 'Primary Address?' (Yes/No), and 'Current Address?' (Yes/No). At the bottom, there is a table for 'Others who live at this address(tick):' with columns for Person, Relationship, Current Address, Address Type, and Primary Address. The 'Save' button is at the bottom right.

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 FPP Training 1 Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs) A Coordi

Home Search **Details** Notes Supports Alerts Referrals Plans Tasks Documents

View Primary Details

Person / Alias: [Create new alias](#)

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Carrie	Alias (Preferred)	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Charles Carrot	Husband	02/06/1984	
Crystal Carrot	Daughter	08/08/2008	

Profiles: [Create new profile](#)

No profiles exist

Cases: [Create new Case](#)

No Cases exist

Address: [Create new address](#)

Street	Locality	Type	Comments	Last Update
✓ 24 Second Avenue	TOWNSVILLE	QLD 4810 Home		14/01/2019

Phone & other contacts: [Create new econtact](#)

No contacts exist

Key Workers: [Create new key worker](#)

This person has no assigned key workers

[Restriction](#) [Export Details](#) [Refresh](#)

Edit Address Details:

Street: 24 Second Avenue

Suburb: TOWNSVILLE

State: QLD

Postcode: 4810

Country: Australia

Comments:

Safety Issues: ☐

Address type: Home

Primary Address? ☒ Yes ☐ No

Current Address? ☒ Yes ☐ No

Others who live at this address(tick):

Person	Relationship	Current Address	Address Type	Primary Address
Charles Carrot	Husband	<input checked="" type="checkbox"/>	Home	<input checked="" type="checkbox"/>
Crystal Carrot	Daughter	<input checked="" type="checkbox"/>	Home	<input checked="" type="checkbox"/>

Last update A Coordinator, FPP Training 1 14/01/2019 09:14:54 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 Address Details:

Another address is currently registered as the primary address.
Please confirm whether or not this is the new primary address.

Street:

Suburb:

State: QLD

Postcode:

Country: Australia

Comments:

Safety Issues: ☐

Address type: Home

Primary Address? ☒ Yes ☐ No

Current Address? ☒ Yes ☐ No

Others who live at this address(tick):

Person	Relationship	Current Address	Address Type	Primary Address
Charles Carrot	Husband	<input type="checkbox"/>		<input type="checkbox"/>
Crystal Carrot	Daughter	<input type="checkbox"/>		<input type="checkbox"/>

Last update

[Save](#)

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 FPP Training 1 Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs) A Coord

Home Search **Details** Notes Supports Alerts Referrals Plans Tasks Documents

View Primary Details

Person / Alias: [Create new alias](#)

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Carrie	Alias (Preferred)	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Charles Carrot	Husband	02/06/1984	
Crystal Carrot	Daughter	08/08/2008	

Profiles: [Create new profile](#)
No profiles exist

Cases: [Create new Case](#)
No Cases exist

Address: [Create new address](#)

Street	Locality	Type	Comments	Last Update
✓ 24 Second Avenue	TOWNSVILLE QLD 4810	Home		14/01/2019
45 Greenslopes Terrace	MAGNETIC ISLAND QLD 4819	Alternative	For Carissa's Mum - most weekends	14/01/2019

Phone & other contacts: [Create new econtact](#)
No contacts exist

Key Workers: [Create new key worker](#)
This person has no assigned key workers

Edit Address Details: [Save](#)

Street: 45 Greenslopes Terrace
Suburb: MAGNETIC ISLAND
State: QLD
Postcode: 4819
Country: Australia
Comments: For Carissa's Mum - most weekends

Safety Issues: ☐
Address type: Alternative
Primary Address? ☐ Yes ☒ No
Current Address? ☒ Yes ☐ No

Others who live at this address(tick):

Person	Relationship	Current Address	Address Type	Primary Address
Charles Carrot	Husband	<input type="checkbox"/>		
Crystal Carrot	Daughter	<input checked="" type="checkbox"/>	Alternative	<input type="checkbox"/>

Last update A Coordinator, FPP Training 1 14/01/2019 09:17:03 AEST

[Restriction](#) [Export Details](#) [Refresh](#)

When a family moves, simply mark that address as **Current Address? – No** and click **Save**. It will be retained and display via the **View Prior** button, under the heading **Prior addresses**.

supporting families FPP Training 1 Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs) A Coord

Home Search **Details** Notes Supports Alerts Referrals Plans Tasks Documents

View Primary Details

Person / Alias: [Create new alias](#)

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Carrie	Alias (Preferred)	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Charles Carrot	Husband	02/06/1984	
Crystal Carrot	Daughter	08/08/2008	

Profiles: [Create new profile](#)
No profiles exist

Cases: [Create new Case](#)
No Cases exist

Address: [Create new address](#) [View Prior](#)

Street	Locality	Type	Comments	Last Update
✓ 115 Frangipani Drive	TOWNSVILLE QLD 4810	Home		14/01/2019
45 Greenslopes Terrace	MAGNETIC ISLAND QLD 4819	Alternative	For Carissa's Mum - most weekends	14/01/2019

Prior addresses

Street	Locality	Type	Comments	Last Update
24 Second Avenue	TOWNSVILLE QLD 4810	Home		14/01/2019

Phone & other contacts: [Create new econtact](#)
No contacts exist

Edit Address Details: [Save](#)

Street: 115 Frangipani Drive
Suburb: TOWNSVILLE
State: QLD
Postcode: 4810
Country: Australia
Comments:

Safety Issues: ☐
Address type: Home
Primary Address? ☒ Yes ☐ No
Current Address? ☒ Yes ☐ No

Others who live at this address(tick):

Person	Relationship	Current Address	Address Type	Primary Address
Charles Carrot	Husband	<input checked="" type="checkbox"/>	Home	<input type="checkbox"/>
Crystal Carrot	Daughter	<input checked="" type="checkbox"/>	Home	<input type="checkbox"/>

Last update A Coordinator, FPP Training 1 14/01/2019 09:19:30 AEST

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.

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

The screenshot shows the 'Edit Contact Details' form for Carissa Carrot. The form includes fields for *Contact, *Contact type, Safety Issues, Comments, Start Date, End Date, Current econtact? (Yes/No), and Last update. A 'Save' button is at the bottom. On the left side of the screen, the 'Create new econtact' button is circled in red.

2. In the **Contact** field, record the telephone number, email address etc.
3. 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 & other contacts:				Create new econtact	View Prior
Contact	Type	Comments	Last Update		
0412 223 223	Mobile		14/01/2019		
5656 9876	Emergency Contact	For Carissa's Mum - Charlene	14/01/2019		
5523 6987	Phone (Hm)	Don't leave messages	14/01/2019		
Prior contacts					
Contact	Type	Comments	Last Update		
5489 1234	Phone (Hm)	Don't leave messages	14/01/2019		

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. **Note:** 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.
2. Select the **Key Worker** from the drop down list.

The screenshot shows the 'View Primary Details' page for a person named Carissa Carrot. The page is divided into several sections: 'Person / Alias', 'Relationships', 'Profiles', 'Cases', 'Address', 'Phone & other contacts', and 'Key Workers'. The 'Key Workers' section at the bottom has a 'Create new key worker' button circled in red. On the right side, the 'Edit Key Worker' form is visible, with the 'Key Worker' dropdown menu also circled in red.

To record a key worker external to your service, select 'Other, please specify:' from the **Key Worker** list. Then enter their *Name*, for *Workgroup* – record the name of their organization and *Role*. It can be helpful to record their phone number in the *Comments* section, role and organization details.

The 'Edit Key Worker' form is shown. The 'Key Worker' dropdown menu is set to 'Other, please specify:'. The form includes fields for Name, Workgroup, Role, and Comments. There are also checkboxes for 'May be viewed by' (Workgroup or Cluster), 'Start Date', 'End Date', 'Current Key Worker?' (Yes or No), and a 'Last update' field. A 'Save' button is at the bottom.

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 FPP Training 1 Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs) A Coordin

Home Search Details Notes Supports Alerts Referrals Plans Tasks Documents

Persons View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Carrie	Alias (Preferred)	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Charles Carrot	Husband	02/06/1984	
Crystal Carrot	Daughter	08/08/2008	

Profiles: Create new profile

No profiles exist

Cases: Create new Case

No Cases exist

Address: Create new address View Prior

Street	Locality	Type	Comments	Last Update
115 Frangipani Drive	TOWNSVILLE QLD 4810	Home		14/01/2019
45 Greenslopes Terrace	MAGNETIC ISLAND QLD 4819	Alternative For Carissa's Mum - most weekends		14/01/2019

Phone & other contacts: Create new econtact View Prior

Contact	Type	Comments	Last Update
0412 223 223	Mobile		14/01/2019
5656 9876	Emergency Contact	For Carissa's Mum - Charlene	14/01/2019
5523 6987	Phone (Hm)	Don't leave messages	14/01/2019

Key Workers: Create new key worker

Worker	Workgroup	Role	Comments
Trevor Turtle	Townsville CSSC	CSO	4568 2323
A Coordinator	FPP Training 1	Lead facilitator	

Family name search GO

Restriction Export Details Refresh

Edit Key Worker:

Key Worker Other, please specify:

Name Trevor Turtle

Workgroup Townsville CSSC

Role CSO

Comments 4568 2323

May be viewed by ☐ Workgroup ☒ Cluster

Start Date 14/01/2019

End Date

Current Key Worker? ☒ Yes ☐ No

Last update A Coordinator 14/01/2019 09:31:45 AEST

Save Delete

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 5 for more information.

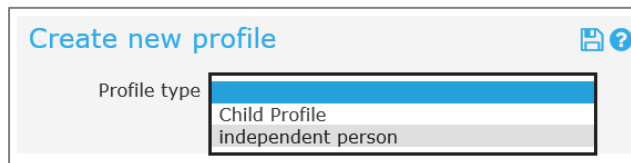
4 Using independent person profile

The **independent person profile** is used when:

- a) your service receives a request/referral from Child Safety to identify an independent person (in relation to a family matter) and
- b) when your service/staff member is engaged as the independent person.

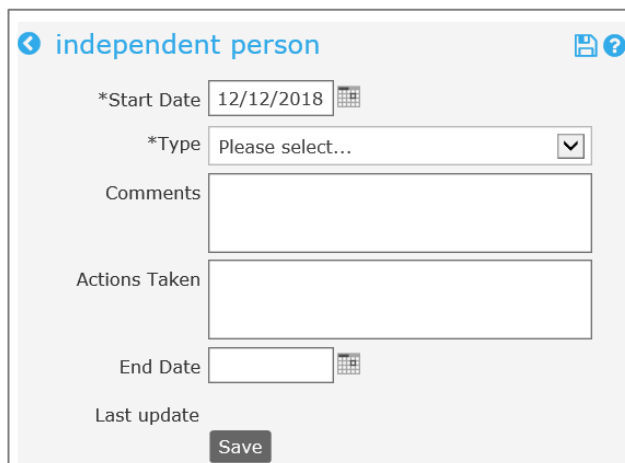
To create and manage an **independent person profile** :

1. On **Person** records, **Details** tab, click [Create new profile](#).
Select the **Profile type** of *independent person* and click **Create**.



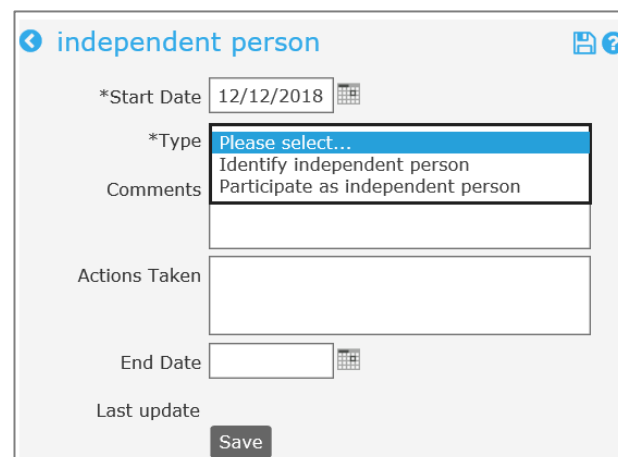
The screenshot shows a 'Create new profile' window. It has a title bar with a save icon and a help icon. Below the title, there is a label 'Profile type' and a dropdown menu. The dropdown menu is open, showing two options: 'Child Profile' and 'independent person'. The 'independent person' option is highlighted.

2. The [independent person](#) form will display :



The screenshot shows the 'independent person' form. It has a title bar with a back icon, the title 'independent person', and save/help icons. The form contains several fields: '*Start Date' with a date picker showing '12/12/2018', '*Type' with a dropdown menu showing 'Please select...', 'Comments' with a text area, 'Actions Taken' with a text area, 'End Date' with a date picker, and 'Last update' with a text area. A 'Save' button is located at the bottom right of the form.

3. Select the Type of *independent person* activity :



The screenshot shows the 'independent person' form with the '*Type' dropdown menu open. The dropdown menu shows three options: 'Please select...', 'Identify independent person', and 'Participate as independent person'. The 'Identify independent person' option is highlighted.

4.1 Identify independent person

- When **Identify independent person** is selected, the following form will display :

Complete Comments, click **Save**.

The Profile record is displayed in the **Details** tab of the Person record.

- This form is used to recognise the key components associated with this activity.
Notes for the Person, using the **Activity Type** of *independent person – identify*, must be used to capture details and time of worker activity.

Refer Section 6 for guidance on **Notes**.

- When the independent person activity has been completed, complete the **End Date** and select the appropriate **Closure Reason**.

End Date

Closure Reason

Please select...

Advised independent person to Child Safety

Unable to identify independent person

Last update 12/12/2018 09:52:43 AEST

The closed Profile record is available by clicking on the [View Prior](#) button, on the **Details** tab.

supporting families

FPP Training 1

Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)

A Coord

Home

Search

Details

Notes

Supports

Alerts

Referrals

Plans

Tasks

Documents

Persons

Days

Cases

Reports

Admin

Recent List

Carissa Carrot

Charles Carrot

Bev Banana

Margerie Mandarin

View Primary Details

Person / Alias:

Create new alias

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Carrie	Alias (Preferred)	

Relationships:

Create new relationship

Person	Relationship	DOB	Comments
Charles Carrot	Husband	02/06/1984	
Crystal Carrot	Daughter	08/08/2008	

Profiles:

Create new profile

View Prior

No current profiles exist

Prior profiles

Profile Type	Workgroup	Start	End
independent person	FPP Training 1	12/12/2018	21/12/2018

Cases

Create new Case

No Cases exist

independent person

*Start Date

12/12/2018

*Type

Identify independent person

Comments

Request received 11/Dec

refer Documents

Family moved to area about 12mths

Actions Taken

Met with family

Made necessary enquiries

Obtained agreement from all parties

End Date

21/12/2018

Closure Reason

Advised independent person to Child

Last update

A Coordinator, FPP Training 1

14/01/2019 09:45:25 AEST

Save

Delete

Copy

Print View

4.2 Participate as independent person

- When **Participate as independent person** is selected, the following form will display :

Complete Comments, click **Save**.

Name	Primary/Alias	Comments
Margerie Mandarin	Primary Name	

Person	Relationship	DOB	Comments
Mark Mandarin	Son	20/01/2010	

Profile Type	Workgroup	Start	Last Update
independent person	FPP Training 1	03/12/2018	14/01/2019

The Profile record is displayed in the **Details** tab of the Person record.

- This form is used to recognise the key components associated with this activity.
Notes for the Person, using the **Activity Type** of *independent person – participate*, must be used to capture details and time of worker activity.

Refer Section 6 for guidance on **Notes**.

- When the independent person activity has been completed, record the **End Date**.
Click **Save**.

The closed Profile record is available by clicking on the **View Prior** button, on the **Details** tab.

supporting families FPP Training 1 Margerie Mandarin Female, DOB: 21/04/1980 (Age 38 yrs) A Coord

Home Search **Details** Notes Supports Alerts Referrals Plans Tasks Documents

Persons View Primary Details

Person / Alias: [Create new alias](#)

Name	Primary/Alias	Comments
Margerie Mandarin	Primary Name	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Mark Mandarin	Son	20/01/2010	

Profiles: [Create new profile](#) [View Prior](#)

No current profiles exist

Prior profiles

Profile Type	Workgroup	Start	End
independent person	FPP Training 1	03/12/2018	20/12/2018

Cases [Create new Case](#) [View Prior](#) [Print View](#)

No current Cases exist

independent person

*Start Date: 03/12/2018

*Type: Participate as independent person

Comments: Request and approval - refer Documents

Actions Taken: For details of meetings refer Notes :
- 4th Dec
- 8th Dec

End Date: 20/12/2018

Last update: A Coordinator, FPP Training 1
14/01/2019 09:54:55 AEST

[Save](#) [Delete](#) [Copy](#)

5 Cases / Case Summary

The **FPP 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 5.1 below
- from the **Cases** page – outlined in Section 5.2 below.

5.1 Create a Case / Case Summary from Persons page

1. From the **Persons** page, **Details** tab, select the **Create new Case** button.
2. Select **FPP 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 5.3 below

The screenshot shows the 'supporting families' interface. The user is viewing the 'Details' tab for 'Carissa Carrot'. The 'Create new Case' button is circled in red. The 'Case type' dropdown menu is open, showing 'FPP Case Summary' as the selected option, which is also circled in red.

5.2 Create Case / Case Summary from the Cases page

1. From the **Cases** page, select the **Create New FPP Case Summary** button.
The **FPP Case Summary** form will open in the right-hand side of your screen.
Complete as outlined in Section 5.3 below – particularly Step 3, add Persons.

The screenshot shows the 'supporting families' interface. The user is viewing the 'Cases' page. The 'Create New FPP Case Summary' button is circled in red. The 'FPP Case Summary' form is visible on the right side of the screen.

5.3 Complete FPP Case Summary details

The **FPP Case Summary** comprises 2 sub-tabs :

- **Summary of details**: captures mandatory data about the referral
- **For Case Closure** : captures mandatory data upon completion of your work with the family.

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

The screenshot displays the 'FPP Case Summary' form with the 'Summary of details' tab selected. The 'For Case closure' tab is also visible. The 'Summary of details' tab contains the following fields:

- * Description (text input)
- * Source of referral (dropdown menu, currently showing 'Please select...')
- I&A Event ID (text input)
- FPP Referral Date (calendar icon)
- * Case Worker (dropdown menu, currently showing 'Worker Two')
- * Case Start Date (calendar icon, currently showing '22/03/2019')
- * Type of referral (dropdown menu, currently showing 'Please select...')
- Response to FPP referral (dropdown menu, currently showing 'Please select...')
- Status (dropdown menu, currently showing 'Open')
- Date of consent to engage FPP (calendar icon)
- Child Safety Officer (text input)
- Child Safety Service Centre (dropdown menu, currently showing 'Please select...')
- Child Safety Priority (dropdown menu, currently showing 'Please select...')
- Independent person (text input)

At the bottom of the form, there is a 'Documents' section with a yellow warning box that says 'Please save before attaching any documents.' Below this is a 'Lock after' section with a lock icon and a 'Last update' section. A 'Save' button is located at the bottom right of the form.

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

The screenshot shows the 'FPP Case Summary' form with the 'Summary of details' tab selected. The following fields are highlighted with red boxes to indicate they are mandatory:

- * Description
- *Source of referral
- *Case Worker
- *Case Start Date
- *Type of referral

Other visible fields include: I&A Event ID, FPP Referral Date, Response to FPP referral, Status, Date of consent to engage FPP, Child Safety Officer, Child Safety Service Centre, Child Safety Priority, independent person, Documents, Lock after, and Last update. A 'Save' button is at the bottom.

1. Complete the following fields :

- ***Description** : title for the Case Summary – this protocol is determined by your service
- ***Source of referral** : select *Child Safety* or *Self-referral*

This screenshot shows the 'FPP Case Summary' form with the 'Summary of details' tab selected. The '*Source of referral' dropdown menu is open, showing the following options:

- Please select...
- Child Safety
- Self-referral

The 'Child Safety' option is highlighted in blue.

- **FPP Referral Date** : the date the referral was received by your service
- ***Case Worker** : the worker assigned to leading the work for this referral. This auto-populates to the worker creating the record. Simply use the drop-down arrow to select another worker within your service
- ***Case Start Date** : is the date the **FPP Case Summary** is created – this field auto-populates to today's date (can be backdated)

- ***Type of referral** : select the type of referral from the drop-down list

When the **Source of referral** is Child Safety, the following mandatory fields will appear:

- ***I&A Event ID** : the reference number on the referral received from Child Safety
For *Self referrals*, this field is to be left blank.
- ***Child Safety Service Centre** : select the value from the drop-down list.

2. Select **Save**.

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

4. 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 FPP Case Summary by ticking their checkbox and click **Save**.

All relevant Persons are now attached to the **FPP Case Summary**.

FPP Case Summary

* Description: Carrot

Person	Role	Start Date	End Date
Carissa Carrot		22/03/2019	
Charles Carrot		22/03/2019	
Crystal Carrot		22/03/2019	

Summary of details | For Case closure

*Source of referral: Child Safety

- Click on the **red** crayon to assign a **Role** for each Person. Click **Save**. Complete for all Persons in the Case.

FPP Case Summary

* Description: Carrot

Person	Role	Start Date	End Date
Carissa Carrot		22/03/2019	
Charles Carrot			
Crystal Carrot			

Summary of details | For Case closure

*Source of referral: Child Safety

*I&A Event ID: 45

FPP Referral Date: 21

*Case Worker: W

*Case Start Date: 22

*Type of referral: Child Safety

Edit association details

Person: Carissa Carrot

Role: Please select...
Carer
Primary Carer
Parent
Kinship carer
Referred child
Other

*Start Date: 22/03/2019

End Date:

Comments:

Last update: Worker Two, FPP - UAT Service
22/03/2019 15:56:30 AEST

Save | Delete | Cancel

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 using the red crayon icon for each Person.

The **Person** section will display as follows :

FPP Case Summary

* Description: Carrot

Person	Role	Start Date	End Date
Carissa Carrot	Primary Carer	22/03/2019	
Charles Carrot	Parent	22/03/2019	
Crystal Carrot	Referred child	22/03/2019	

Summary of details | For Case closure

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

FPP Case Summary

* Description: Carrot

Person	Role	Start Date	End Date
Carissa Carrot	Primary Carer	22/03/2019	
Charles Carrot	Parent	22/03/2019	
Crystal Carrot	Referred child	22/03/2019	

Summary of details | For Case closure

*Source of referral: Child Safety

*I&A Event ID: 45672145

FPP Referral Date: 21/03/2019

*Case Worker: Worker Two

*Case Start Date: 22/03/2019

*Type of referral: I&A - CINOP decision

Response to FPP referral Status: **Please select...**
Accepted
Not Accepted

- Complete the **Child Safety Priority** field of details as advised on the received referral.

Child Safety Priority: **Please select...**
24 hour
5 day
10 day

- In accordance with the procedures of your service, relevant documents can be uploaded to by clicking **Select & Upload**.

Documents **Select & Upload**

File Name	Uploaded
Carrot family history.docx	22/03/2019 16:02:07 AEST

Lock after

Last update: Worker Two, FPP - UAT Service
22/03/2019 16:03:59 AEST

Save **Save Final** **Print View**

..as an example

The **Summary of details** sub-tab of the **FPP Case Summary** is now completed with the available information.

- When the family has been contacted and consent to engage with your service, complete the **Date of consent to engage FPP** field.
This is reflected in the reporting for your service.

A copy of the consent form can also be attached to the Case Summary.

FPP Case Summary

* Description: Carrot

Person	Role	Start Date	End Date
Carissa Carrot	Primary Carer	22/03/2019	
Charles Carrot	Parent	22/03/2019	
Crystal Carrot	Referred child	22/03/2019	

Summary of details | **For Case closure**

*Source of referral: Child Safety

*I&A Event ID: 45672145

FPP Referral Date: 21/03/2019

*Case Worker: Worker Two

*Case Start Date: 22/03/2019

*Type of referral: I&A - CINOP decision

Response to FPP referral: Accepted

Status: Open

Date of consent to engage FPP: 27/03/2019

Child Safety Officer:

*Child Safety Service Centre: Charleville CSSC

Child Safety Priority: Please select...

independent person:

Documents: [Select & Upload](#)

File Name	Uploaded
Family consent.docx	22/03/2019 16:04:27 AEST
Carrot family history.docx	22/03/2019 16:02:07 AEST

Lock after:

Last update: Worker Two, FPP - UAT Service
22/03/2019 16:04:28 AEST

[Save](#) [Save Final](#) [Print View](#)

5.4 Close an FPP Case Summary

The accurate closure of the **FPP Case Summary** is very important for reporting for your service. **Closing a Case Summary means you have finished working with the family.**

Complete the following steps to close an **FPP Case Summary** :

1. Open the **FPP 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 **For Case closure** sub-tab.

The screenshot shows the 'FPP Case Summary' form with the 'For Case closure' sub-tab selected. The form includes a description field with 'Carrot', a table of persons, and various closure-related fields and checkboxes.

Person	Role	Start Date	End Date
Carissa Carrot	Primary Carer	05/12/2018	
Charles Carrot	Parent	05/12/2018	
Crystal Carrot	Referred child	05/12/2018	

Summary of details

I&A Completion Date: [Date Picker]

*Case End Date: [Date Picker]

*Case closure reason: Please select... [Dropdown]

Closure Checklist

Procedure Review

- ☐ Active Engagement procedure followed
- ☐ Referrals sent and uploaded (if appropriate)
- ☐ Case review for non-engaged families
- ☐ Approval to close

Data Collection

- ☐ Case notes completed
- ☐ Relevant documents uploaded
- ☐ Key worker ended
- ☐ Outstanding tasks completed

Lock after [Icon]

Last update A Coordinator, FPP Training 1
12/12/2018 13:03:09 AEST

Buttons: Print View, Save, Save Final

The options available here depend on the **Response to FPP referral** recorded on the **Summary** sub-tab.

3. If the Response is **Accepted**,
 - record the **I&A Completion Date**, if it is known
 - 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.

NOTE : 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. Select the appropriate ***Case closure reason** :

The screenshot shows the dropdown menu for the '*Case closure reason' field. The options are:

- Please select...
- FLDM process completed
- Family did not consent to service involvement
- Family withdrew consent from FLDM process
- Child Safety notified FPP no longer appropriate
- Unable to locate family

5. Complete the **Closure checklist** - it is anticipated this will be integrated with practices established within your service.

Closure Checklist

Procedure Review

☐ Active Engagement procedure followed

☐ Referrals sent and uploaded (if appropriate)

☐ Case review for non-engaged families

☐ Approval to close

Data Collection

☐ Case notes completed

☐ Relevant documents uploaded

☐ Key worker ended

☐ Outstanding tasks completed

6. Select **Save**.

Where the **Type of referral** = *I&A – CINOP decision* and the **Case closure reason** = *FLDM process completed*, additional mandatory fields are displayed to provide for the capture of relevant data.

*Case closure reason: FLDM process completed ▼

*Provided: ☐ family plan
☐ Case Plan

*Child Safety Decision: Please select...
CNINOP
CINOP
Decision not known

Where a *Case Plan* has been provided, the following fields will display:

*Case closure reason: FLDM process completed ▼

*Provided: ☐ family plan
☒ Case Plan

*Includes:

☐ Cultural support plan

☐ Reunification

☐ Transition to adulthood

*Child Safety decision advised:

☐ IPA

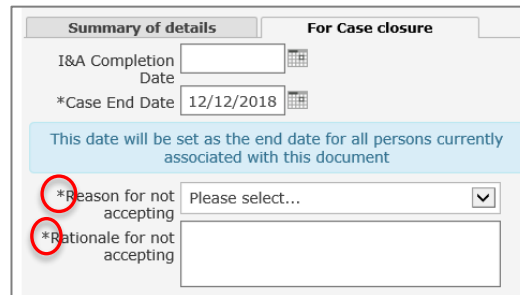
☐ Referral to DCPL

*Child Safety Decision: Please select...
CNINOP
CINOP
Decision not known

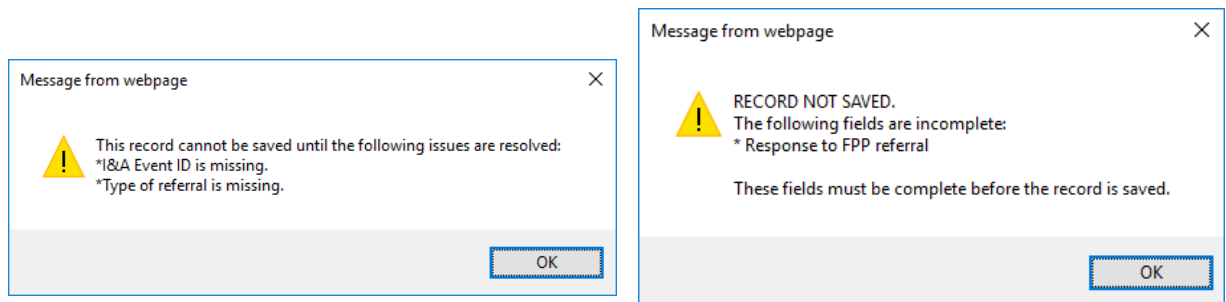
Closure Checklist

Procedure Review

7. If the **Response to FPP referral** (on the **Summary of details** sub-tab) is **Not Accepted**,
- record the **Case End Date**
 - complete the * mandatory fields displayed.



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

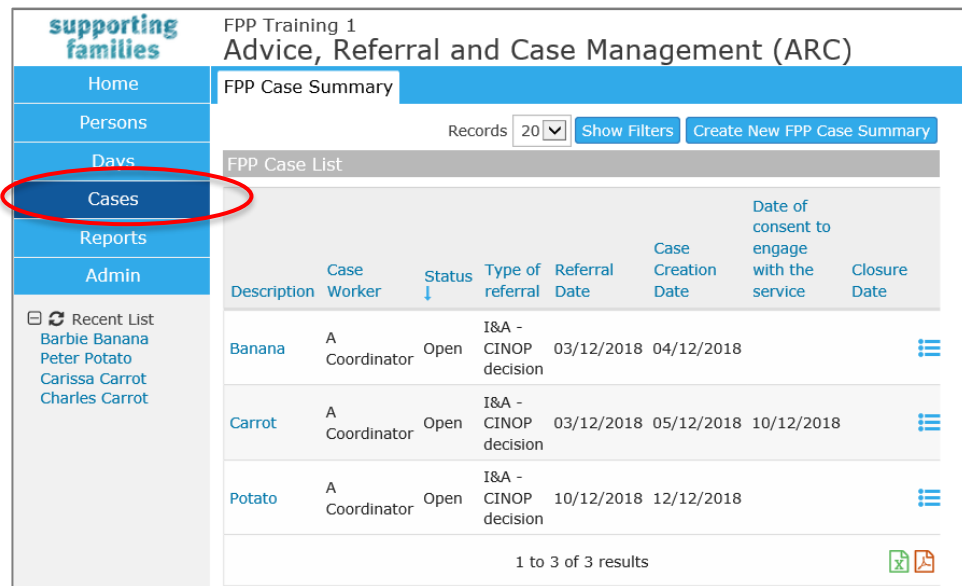


The following tasks are also required to be completed upon Closure :

- Close Key Worker – refer to the section [Close Key Worker](#)

5.5 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.

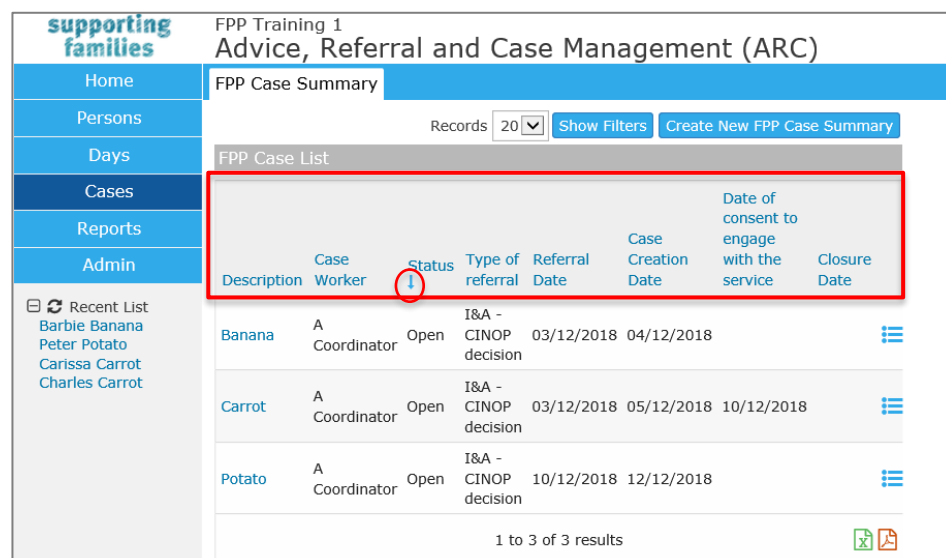


Description	Case Worker	Status	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana	A Coordinator	Open	I&A - CINOP decision	03/12/2018	04/12/2018		
Carrot	A Coordinator	Open	I&A - CINOP decision	03/12/2018	05/12/2018	10/12/2018	
Potato	A Coordinator	Open	I&A - CINOP decision	10/12/2018	12/12/2018		

1 to 3 of 3 results

a) Order by column

The display of Cases can be actioned from each column – simply click the column to activate (will show the little blue arrow) , and click again to change the direction of the display.



Description	Case Worker	Status	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana	A Coordinator	Open	I&A - CINOP decision	03/12/2018	04/12/2018		
Carrot	A Coordinator	Open	I&A - CINOP decision	03/12/2018	05/12/2018	10/12/2018	
Potato	A Coordinator	Open	I&A - CINOP decision	10/12/2018	12/12/2018		

1 to 3 of 3 results

b) Apply filters

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

The screenshot shows the 'FPP Case Summary' page. The left sidebar contains a 'Recent List' with names: Barbie Banana, Peter Potato, Carissa Carrot, and Charles Carrot. The main content area has a 'Records' dropdown set to 20 and a 'Show Filters' button circled in red. Below this is the 'FPP Case List' table.

Description	Case Worker	Status ↓	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana	F User	Open	I&A - CINOP decision	03/12/2018	04/12/2018		
Carrot	A Coordinator	Open	I&A - CINOP decision	03/12/2018	05/12/2018	10/12/2018	
Potato	A Coordinator	Open	I&A - CINOP decision	10/12/2018	12/12/2018		

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

This screenshot shows the same page as the previous one, but with filter dropdowns applied to the 'Case Worker', 'Status', and 'Type of referral' columns. The 'Case Worker' dropdown is set to 'F Us', 'Status' is set to 'Open', and 'Type of referral' is set to 'I&A - CINOP decision'. The 'Apply Filters' button is highlighted.

Description	Case Worker	Status ↓	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service
Banana	F User	Open	I&A - CINOP decision	03/12/2018	04/12/2018	
Carrot	A Coordinator	Open	I&A - CINOP decision	03/12/2018	05/12/2018	10/12/2018
Potato	A Coordinator	Open	I&A - CINOP decision	10/12/2018	12/12/2018	

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

This screenshot shows the 'FPP Case Summary' page with the 'Clear Filters' and 'Hide Filters' buttons highlighted with a red box. The filter dropdowns are still applied, but the 'Apply Filters' button is no longer highlighted.

Description	Case Worker	Status ↓	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service
Banana	F User	Open	I&A - CINOP decision	03/12/2018	04/12/2018	

1 to 1 of 1 results

c) Create new FPP Case Summary

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

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

The screenshot shows the 'FPP Training 1 Advice, Referral and Case Management (ARC)' interface. On the left is a sidebar with navigation links: Home, Persons, Days, Cases, Reports, and Admin. The 'Cases' link is selected. The main area displays the 'FPP Case List' with a table of cases. A button labeled 'Create New FPP Case Summary' is highlighted with a red circle in the top right of the main area. To the right of the table is a form for creating a new case summary, with fields for Description, I&A Event ID, FPP Referral Date, Case Worker, Case Start Date, Type of referral, Response to FPP referral, Status, Date of consent to engage FPP, Child Safety Officer, Child Safety Service Centre, Child Safety Priority, and independent person. There is also a 'Documents' section with a warning to save before attaching documents, and a 'Lock after' section with a 'Save' button.


Description	Case Worker	Status	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana	F User	Open	I&A - CINOP decision	03/12/2018	04/12/2018		
Carrot	A Coordinator	Open	I&A - CINOP decision	03/12/2018	05/12/2018	10/12/2018	
Potato	A Coordinator	Open	I&A - CINOP decision	10/12/2018	12/12/2018		

Complete the 6 mandatory (*) data fields and click **Save**.



It is **CRITICAL** to attach Person records to the FPP Case Summary.

The screenshot shows the 'FPP Case Summary' form. The 'Description' field is filled with 'Honeydew'. Below the form, there is a table with columns: Person, Role, Start Date, and End Date. A red circle highlights a plus icon (+) in the top right corner of the table, indicating where to click to attach person records. The 'Summary of details' tab is selected, and the '*I&A Event ID' field is filled with '44568897'.

Click the  icon to attach the relevant Person records for this Case.

Refer to Section 5.3 of this Manual for additional guidance in completing the FPP Case Summary.

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 **FPP 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 FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home FPP Case Summary Records 20 Show Filters Create New FPP Case Summary Menu

Persons Days Cases Reports Admin

Recent List
Bev Banana
Peter Potato
Carissa Carrot

FPP Case List

Description	Case Worker	Status	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Carrot	A Coordinator	Open	I&A - CINOP decision	03/12/2018	05/12/2018	10/12/2018	
Potato	A Coordinator	Open	I&A - CINOP decision	07/12/2018	10/12/2018		
Banana	A Coordinator	Closed	I&A - CINOP decision	03/12/2018	03/12/2018		10/12/2018

1 to 3 of 3 results

Associated Records Filter Create New

Date	Record	Type	Notes	Actions
11/12/2018	Note	FLDM preparation (family)	prepare and collate information f...	
13/12/2018	Note	Run a FLDM meeting	Excellent presentation of family...	
10/12/2018	Note	Gain consent	Attended the family home - very...	
07/12/2018	Note	Gain consent	Contacted Carissa to arrange for...	
07/12/2018	Note	Child Safety consultation	Telephoned CSO to discuss	
05/12/2018	Note	File note	Received referral and set-up in A...	

1 to 6 of 6 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.

supporting families FPP Training 1 Advice, Referral and Case Management (ARC)

Home FPP Case Summary Records 20 Show Filters Create New FPP Case Summary

Persons Days Cases Reports Admin

Recent List
Bev Banana
Peter Potato
Carissa Carrot

FPP Case List

Description	Case Worker	Status	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Carrot	A Coordinator	Open	I&A - CINOP decision	03/12/2018	05/12/2018	10/12/2018	
Potato	A Coordinator	Open	I&A - CINOP decision	07/12/2018	10/12/2018		
Banana	A Coordinator	Closed	I&A - CINOP decision	03/12/2018	03/12/2018		10/12/2018

1 to 3 of 3 results

Associated Records Note

Note Details

This record can only be edited from the Persons page

Activity Date 07/12/2018

Worker/s A Coordinator, FPP Training 1

Work group FPP Training 1

Activity Type Child Safety consultation

Case Summary Carrot

Notes
Telephoned CSO to discuss

Also associated with: Carissa Carrot, Indirect association


Activity Length
Contact Case Work Travel mins
45 mins

Edit locked 13/01/2019

Last update A Coordinator, FPP Training 1
10/01/2019 17:24:36 AEST






Print View



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.

Associated Records

Associated Records Filter Create New

Date	Record	Type	Notes	Actions
 11/12/2018	Note	FLDM preparation (family)	prepare and collate information f...	
 13/12/2018	Note	Run a FLDM meeting	Excellent presentation of family...	
 10/12/2018	Note	Gain consent	Attended the family home - very...	
 07/12/2018	Note	Gain consent	Contacted Carissa to arrange for...	
 Workers / Workgroups			Telephoned CSO to discuss issue...	
		Trevor Tomato, DCSYW. [CSO]		
		A Coordinator, FPP Training 1	Received referral and set-up in A...	







1 to 6 of 6 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 display of records can be ordered by clicking each column – with the **blue** arrow indicator appearing. Simply click again to reverse the order.

Associated Records

Associated Records Filter Create New

Date ↓	Record	Type	Notes	Actions
 12/11/2018	Note	Run a FLDM meeting	Excellent presentation of family...	
 11/12/2018	Note	FLDM preparation (family)	prepare and collate information f...	
 10/12/2018	Note	Gain consent	Attended the family home - very...	
 07/12/2018	Note	Child Safety consultation	Telephoned CSO to discuss issue...	
 07/12/2018	Note	Gain consent	Contacted Carissa to arrange for...	
 05/12/2018	Note	File note	Received referral and set-up in A...	

1 to 6 of 6 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.

Associated Records

Associated Records **Filter** **Create New**

From: 03/12/2018 Record: Note

To: 07/12/2018 Search Clear

Date	Record	Type	Notes	Actions
07/12/2018	Note	Gain consent	Contacted Carissa to arrange for i...	
07/12/2018	Note	Child Safety consultation	Telephoned CSO to discuss issues...	
05/12/2018	Note	File note	Received referral and set-up in ARC	

1 to 3 of 3 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 **Create New** button enables you to select a record type to create a new record.

Associated Records

Associated Records **Filter** **Create New**

Note

Support

Alert

Task

Document

Date	Record	Type	Notes	Actions
11/01/2019	Task	Appointment	Initial meeting with the fa...	
18/12/2018	Note	Gain consent	Telephoned Fred - introduc...	
17/12/2018	Note	Child Safety consultation	Contacted Trev to discuss referral	

The Persons attached to the **FPP 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	<input checked="" type="checkbox"/>
Crystal Carrot	<input checked="" type="checkbox"/>
Charles Carrot	<input checked="" type="checkbox"/>

6 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**.

The screenshot shows the ARC system interface for a user named Margerie Mandarin. The 'Notes' tab is selected, and the 'Create New Note' button is highlighted with a red circle. The 'Edit Note Details' form on the right shows the following fields:

- Activity Date: 14/01/2019
- * Worker/s: A Coordinator, FPP Training 1
- * Activity Type: (dropdown menu)
- Case Summary: Mandarin (08/01/2019 - current)
- Notes: (text area)
- This note is also associated with (tick):
- Name: Mark Mandarin, Relationship: Son, Associate record with: (checkbox)
- * Activity Length: Contact, Case Work, Travel (mins)
- May be edited to 17/01/2019
- Last update
- Save, Save Final buttons

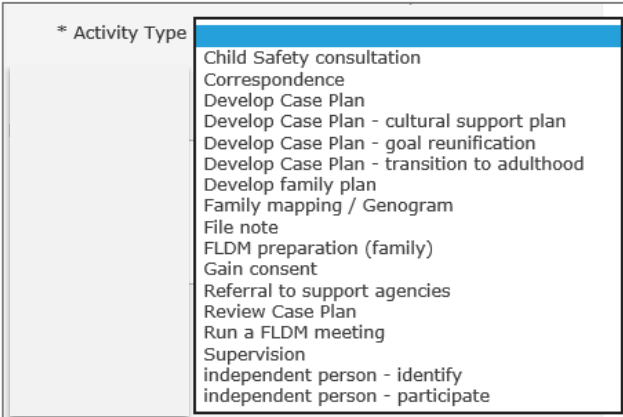
There are 3 (*) mandatory fields required to save a Note.

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, click **Add**, then **Close**.

The two screenshots show the 'Edit Note Details' form with the 'Additional workers' section expanded. The left screenshot shows the 'Workgroup' dropdown set to 'FPP Training 1' and the 'Worker' dropdown set to 'K User'. The right screenshot shows the 'Workgroup' dropdown set to 'FPP Training 1' and the 'Worker' dropdown set to 'Trevor Turtle'. Both screenshots show the 'Add' and 'Close' buttons at the bottom of the section.

5. Select the * **Activity Type** for the Note being recorded :

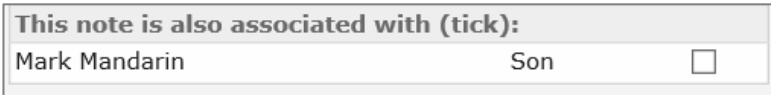


* Activity Type

- Child Safety consultation
- Correspondence
- Develop Case Plan
- Develop Case Plan - cultural support plan
- Develop Case Plan - goal reunification
- Develop Case Plan - transition to adulthood
- Develop family plan
- Family mapping / Genogram
- File note
- FLDM preparation (family)
- Gain consent
- Referral to support agencies
- Review Case Plan
- Run a FLDM meeting
- Supervision
- independent person - identify
- independent person - participate

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

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):		
Mark Mandarin	Son	<input type="checkbox"/>

Refer section [Create Relationships](#) for more information on creating relationships.

8. 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**.

9. Select **Save** to save a draft of the note - all notes will automatically become locked/un-editable after 3 days of saving, as shown by *May be edited to dd/mm/yyyy*
10. Select **Save Final** if you want to lock the note now.

Edit Note Details

Activity Date
14/01/2019

* Worker/s
A Coordinator, FPP Training 1
Trevor Turtle, Child Safety [CSO]

* Activity Type
Child Safety consultation

Case Summary
Mandarin (08/01/2019 - current)

Notes

Discussed current circumstances and recent history of the Mandarin family.

This note is also associated with (tick):

Name ↑	Relationship	Associate record with:
Mark Mandarin	Son	<input checked="" type="checkbox"/>

* Activity Length
Contact
45
Travel
mins

May be edited to 17/01/2019

Last update A Coordinator, FPP Training 1
14/01/2019 11:13:44 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.

A locked Note will look like this :

Note Details

Activity Date
14/01/2019

Worker/s
A Coordinator, FPP Training 1

Work group
FPP Training 1

Activity Type
Gain consent

Case Summary
Carrot

Notes

Met with the family and discussed the current sitatuion and the assistance our service can provide. Very positive - consent obtained

Also associated with:
Charles Carrot, Husband
Crystal Carrot, Daughter

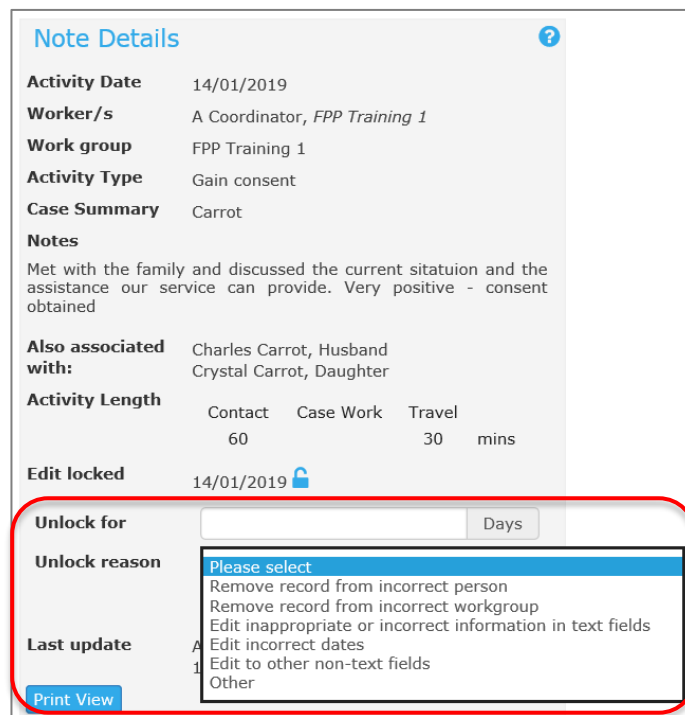
Activity Length
Contact
60
Case Work
30
Travel
mins

Edit locked
14/01/2019

Last update
A Coordinator, FPP Training 1
14/01/2019 11:14:48 AEST

Print View

A user with Coordinator access within your service can **unlock** the Note (and enable edits to be made) by simply clicking the **blue** unlock icon, then..



Note Details ?

Activity Date 14/01/2019

Worker/s A Coordinator, FPP Training 1

Work group FPP Training 1

Activity Type Gain consent


Case Summary Carrot

Notes
Met with the family and discussed the current situation and the assistance our service can provide. Very positive - consent obtained

Also associated with: Charles Carrot, Husband
Crystal Carrot, Daughter

Activity Length

Contact	Case Work	Travel	
60		30	mins

Edit locked 14/01/2019 

Unlock for Days

Unlock reason

- Please select
- 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

Last update A 1

[Print View](#)

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

7 Plans

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

7.1 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

FPP Training 1
Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)

Home Search Details Notes Supports Alerts Referrals **Plans** Tasks Documents

Persons Days Cases Reports Admin

Recent List
Carissa Carrot
Margerie Mandarin
Bev Banana
Charles Carrot

Plans

No Plans to display

Edit Plan Details

Date: 14/01/2019

* Oversight: A Coordinator, FPP Training 1

Description:

This plan is also associated with (tick):

Name	Relationship	Associate record with:
Charles Carrot	Husband	<input type="checkbox"/>
Crystal Carrot	Daughter	<input type="checkbox"/>

Review date:

Close date:

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 icon 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 **FPP Case Summary**).
4. Click **Save**. Once the plan is saved, you are able to add **Actions**.



7.2 Create new Action within a Plan

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

The screenshot shows the 'Edit Plan Details' form for a plan named 'Carrot FLDM'. The form includes fields for Date (14/01/2019), Review Date, Worker (A Coordinator), and Work Group. It also has a section for 'Oversight' with a list of workers: Charles Carrot (Husband) and Crystal Carrot (Daughter). A red circle highlights the 'Create New Action' button in the bottom right corner of the 'Edit Plan Details' section.

2. The **Edit Action Details** template will appear.

The screenshot shows the 'Edit Action Details' form for an action named 'Carrot FLDM'. The form includes fields for Date (14/01/2019), Review date, Closed date, Concerns and Worries, Strengths and Resources, Outcome, and Comments on Outcome. A red circle highlights the 'Edit Action Details' section, which includes these fields and a 'Service' icon.

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, enabling you to edit as required.

Edit Plan Details

Date: 14/01/2019

* Oversight: A Coordinator, FPP Training 1

Description: Carrot FLDM Plan

This plan is also associated with (tick):

Name ↑	Relationship	Associate record with:
Charles Carrot	Husband	<input checked="" type="checkbox"/>
Crystal Carrot	Daughter	<input checked="" type="checkbox"/>

Review date:

Close date:

Last update: A Coordinator, FPP Training 1 04/04/2019 13:28:00 AEST

Actions

Date/Worker	Strengths, Concerns/Worries	Goals	Actions	Review/Close
14/01/2019 A Coordinator	Concerns and Worries: Strengths:		Contact CSO and discuss significant considerations from referral	Review: Not Set Closed: Not Set
14/01/2019 A Coordinator	Concerns and Worries: Strengths:		Obtain consent from the family	Review: Not Set Closed: Not Set
14/01/2019 A Coordinator	Concerns and Worries: Strengths:		Document family relationships / genogram	Review: Not Set Closed: Not Set

Edit Action Details

Date: 14/01/2019

Review date:

Closed date:

* Oversight: A Coordinator, FPP Training 1

Last update: A Coordinator, FPP Training 1 04/04/2019 13:26:44 AEST

Concerns and Worries:

Strengths and Resources:

Goal:

Outcome: ☒ Goal not achieved 1 ☐ ☐ ☐ Goal fully achieved 5 ☐ N/A

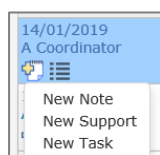
Actions: Contact CSO and discuss significant considerations from referral

Comments on Outcome:

Order: 0

Save Delete

Print View



Within an Action, the icon with the yellow cross provides a short-cut to record a **Note, Support** and/or **Task** directly from the Plan.

The 'dots and dashes stack' icon then provides a collated view of all records associated with this Action.

This is a particularly useful, time-efficient feature.

Associated Records			
		Create New Filter	
Date ↓	Record Type	Notes	
16/01/2019	Note	Child Safety consultation	From review of documents provided form CS, emailed Felicity to request clarification on the following :
14/01/2019	Note	Child Safety consultation	Contacted CSO Felicity - discussed referral to understand specific concerns and challenges
1 to 2 of 2 results			

Order:

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 (to incorporate new Actions or reflect changed priorities) 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.

7.3 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).

Note : 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.

7.4 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 the respective **View Prior** buttons.

FPP Training 1
Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)

Search Details Notes Supports Alerts Referrals **Plans** Tasks Documents

Plans Filter Create New Plan **View Prior**

No current Plans to display

Prior Plans

Date ↑	Review Date	Worker	Work Group	Description
14/01/2019		A Coordinator		Carrot FLDM Plan

Export Plans 1 to 1 of 1

Edit Plan Details

Date: 14/01/2019

* Oversight: A Coordinator, FPP Training 1

Description: Carrot FLDM Plan

This plan is also associated with (tick):

Name ↑	Relationship	Associate record with:
Charles Carrot	Husband	<input checked="" type="checkbox"/>
Crystal Carrot	Daughter	<input checked="" type="checkbox"/>

Review date:

Close date: 15/02/2019

Last update: A Coordinator, FPP Training 1
04/04/2019 13:42:37 AEST

Actions Create New Action **View Prior**

No current Actions to display

Prior Actions

Date/Worker	Strengths, Concerns/Worries	Goals Actions	Review/Close
14/01/2019 A Coordinator	Concerns and Worries: Strengths:	Contact CSO and discuss significant considerations from referral	Review: Not Set Closed: 18/01/2019 Solid understanding obtained from CSO
14/01/2019 A Coordinator	Concerns and Worries: Strengths:	Obtain consent from the family	Review: Not Set Closed: 21/01/2019 Filed on Case Summary
14/01/2019 A Coordinator	Concerns and Worries: Strengths:	Document family relationships / genogram	Review: Not Set Closed: 24/01/2019

Save

Print View

7.5 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.

Note: 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.

8 Tasks & Alerts

8.1 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**.

3. Enter **Task date** and **times**.
4. 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 Outlook calendar invitation. All workers associated with the task will receive a Microsoft Outlook calendar invitation if 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 must 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**.

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.

The screenshot shows the 'supporting families' interface for 'FPP Training 1' and 'Margerie Mandarin'. The 'Tasks' tab is selected. A sidebar on the left contains links: Home, Persons, Days, Cases, Reports, and Admin. The main area shows a list of tasks with columns: Action Date, Start/End, Worker, and Task. Two tasks are listed: 'Appointment Meeting with Trevor (CSO)' on 17/01/2019 and 'Review Internal review with team' on 16/01/2019. Above the task list, there are buttons for 'Filter', 'Calendar View' (circled in red), and 'Create New Task'.

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

This screenshot shows the 'Calendar View' for January 2019. The interface includes a sidebar with navigation links and a main calendar grid. At the top right of the calendar, there are buttons for 'Filter', 'List View', 'Create New', and a set of view buttons: 'Day', 'Week', and 'Month' (all three are circled in red). The calendar grid shows dates from 1 to 31. Two tasks are visible on the calendar: 'Review' on Tuesday, 16th, and '10:00 am Appointment' on Wednesday, 17th.

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

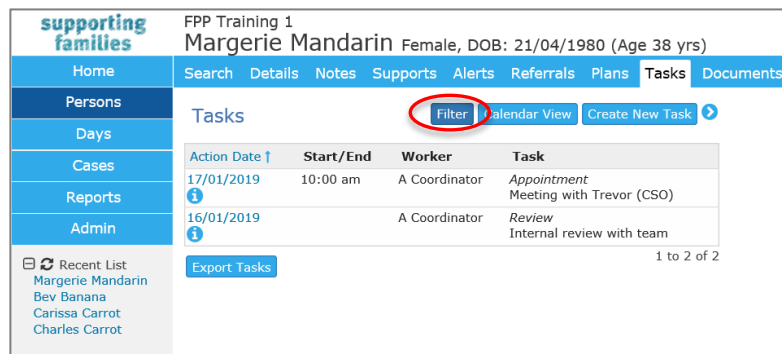
Overdue Tasks are highlighted in pink – as below.

The screenshot shows the 'My Actions' tab in the 'supporting families' system. It displays a list of tasks with columns: Due Date, Time, Action Type, Workgroup, Person, Description, and Details. The task 'Review for practice learnings' on 04/12/2018, assigned to 'Bev Banana', is highlighted in pink. Other tasks include 'Meeting with Trevor (CSO)', 'Initial family meeting', and 'Internal review with team'. A 'Mark Complete' button is at the bottom left of the task list.

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

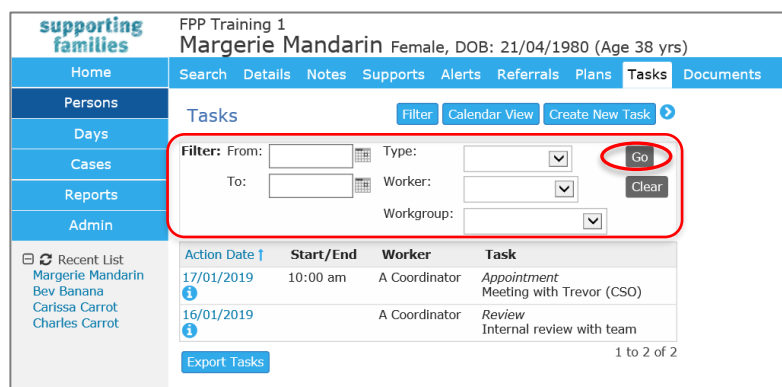
Additional Notes:

- 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**.



The screenshot shows the 'supporting families' interface for a user named Margerie Mandarin. The 'Tasks' tab is selected. A red circle highlights the 'Filter' button. Below the button, there is a table of tasks with columns: Action Date, Start/End, Worker, and Task. The table shows two tasks: one on 17/01/2019 and another on 16/01/2019. An 'Export Tasks' button is visible at the bottom of the table.

Action Date	Start/End	Worker	Task
17/01/2019	10:00 am	A Coordinator	Appointment Meeting with Trevor (CSO)
16/01/2019		A Coordinator	Review Internal review with team



This screenshot shows the same 'supporting families' interface, but with the filter form expanded. A red box highlights the filter section, which includes fields for 'From', 'To', 'Type', 'Worker', and 'Workgroup'. There are 'Go' and 'Clear' buttons next to the filter fields. The task table and 'Export Tasks' button are also visible below the filter form.

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

8.2 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.

The screenshot shows the 'supporting families' interface. On the left is a sidebar with navigation links: Home, Persons, Days, Cases, Reports, Admin, and a 'Recent List' containing Margerie Mandarin, Bev Banana, Carlissa Carrot, and Charles Carrot. The main content area has tabs for Search, Details, Notes, Supports, Alerts, Referrals, Plans, Tasks, and Documents. The 'Alerts' tab is active, displaying 'No Alerts to display' and a 'Create New Alert' button circled in red. To the right, the 'Edit Alert Details' form is open, showing a date of 14/01/2019, a worker 'A Coordinator, FPP Training 1', and a dropdown for 'Alert type' set to 'Safety'. A list of categories is visible: Safety (Violence against worker, Family violence, At risk of violence, Aggressive Behaviour, Security issue, Self Harm), Health (Chronic Medical Condition, Medication, Mental health issue), Financial (Debts owing, Financial support provided), Legal (Warrant Pending, Legal advice recommended, DVO / probation / parole conditions), and Other (Alias must be spoken, Interpreter, Other).

3. Complete details, as guidance below:
 - the **Date** auto-populates to today's 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 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.

This screenshot shows the 'Details' tab for Margerie Mandarin. A red warning icon is circled in red next to her name. The 'Edit Primary Details' form is open on the right, showing fields for 'Given Name' (Margerie) and 'Middle Name'. The 'Person / Alias' table on the left shows Margerie Mandarin as the primary name.

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.

9 Supports and Brokerage payments

9.1 Create Support / Brokerage Payment

1. From the **Persons** page, select **Supports** tab.
2. Click **Create New Support / Brokerage**.

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'A Coordinator (Coordinator)'. The main navigation bar includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Referrals', 'Plans', 'Tasks', and 'Documents'. The left sidebar shows 'Persons' as the active section, with a list of recent contacts: Margerie Mandarin, Bev Banana, Carlissa Carrot, and Charles Carrot. The main content area is titled 'Support/Brokerage' and shows 'No Support / Brokerages to display'. A red circle highlights the 'Create New Support / Brokerage' button. The 'Edit Support/Brokerage Details' form is visible, with the 'Support type' dropdown menu set to 'Brokerage'.

3. Enter **Date*** for recording Support request. This can be backdated.
4. The **Worker/s** field will default to the user entering the Support details.
To add more workers, select the icon. To delete workers select the icon.
5. Select **Support type*** : *Brokerage* - for specialist goods and/or services that contribute to the overall needs and wellbeing of the child and family as part of their Support Plan.
(*Emergency Relief* is not provided for within the Family Participation Program Guidelines).
6. Enter the financial/dollar **Amount*** for the support provided.
7. Record description in the **Details** box. eg. nature of and reason for support.
8. In the **Payments sub-tab**, complete the **Provider Name**, **Service Type***, **Expenditure type** (goods or services), **Brokerage code**, **Method of payment** and **Payment date***.
The use of these fields is as prescribed by the procedures of your service.
9. Select **Save**. The Support record will appear in a list on the left-hand side of the screen.

The screenshot shows the 'Edit Support/Brokerage Details' form. The left sidebar contains navigation links: Home, Persons, Days, Cases, Reports, and Admin. The main content area has tabs for Search, Details, Notes, Supports, Alerts, Referrals, Plans, Tasks, and Documents. The 'Supports' tab is active, showing a table with columns: Date, Worker / Type, Details, and Amount. The table contains one record: 14/01/2019, A Coordinator Brokerage, Bus travel to attend meeting on 17th, \$40.00. The total amount is \$40.00. The right panel shows the 'Edit Support/Brokerage Details' form with fields for Date (14/01/2019), Worker/s (A Coordinator, FPP Training 1), Support type (Brokerage), Case Summary (Mandarin (08/01/2019 - current)), Amount (\$40.00), Details (Bus travel to attend meeting on 17th), Provider Name (ABC BusLines), Service type (Community transport), Expenditure type (Goods/Services), Brokerage code, Method of payment (Please select...), and Payment date. The form also shows the last update by A Coordinator, FPP Training 1 on 14/01/2019 at 11:58:19 AEST. Buttons for Save, Delete, and Print View are at the bottom.

Additional Notes:

- A user with Coordinator access level is able to delete a Payment record.
- Support records can be printed by selecting Print View (available in the bottom left of the Edit Support/Brokerage Details form once the record has been saved)

9.2 Approve Support / Brokerage Payment

The use of these fields is as prescribed by the procedures of your service.

1. On the **Persons** page, select **Supports** tab.
2. Select the appropriate record from the Support/Brokerage list to open the **Edit Support/Brokerage Details** form.
3. Navigate to the **Approval** sub-tab.

The screenshot shows the 'Approval' sub-tab of the 'Edit Support/Brokerage Details' form. The 'Payment' tab is also visible. The 'Approved' field has radio buttons for 'Yes' (selected) and 'No'. Below it is a text field for 'Reason not approved'. The 'Authorised by' field contains 'Mary Mushroom', the 'Position' field contains 'FPP Manager', and the 'Authorised date' field contains '14/01/2019'. The form also shows the last update by A Coordinator, FPP Training 1 on 14/01/2019 at 11:58:19 AEST. Buttons for Save, Delete, and Print View are at the bottom.

4. Enter **Approval** (Yes or No), if No is selected enter a **Reason not approved**.
5. Enter the **Authorised by**, **Position** and **Authorised Date**
6. Select **Save**.

10 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.

The screenshot shows the 'supporting families' web application. At the top, it identifies the user as 'FPP Training 1' and the subject as 'Carissa Carrot', a female born on 21/04/1990 (28 years old). The user role is 'A Coordinator (Coordinator)'. The main navigation bar includes 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The 'Persons' section is active, showing a list of tabs: 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Referrals', 'Plans', 'Tasks', and 'Documents'. The 'Referrals' tab is selected, and a 'Create new Referral' button is highlighted with a red circle. Below this button, a message states 'This person has no history of referrals on record'. To the right, the 'Referral' form is visible, featuring radio buttons for 'Search', 'Favourites', 'Manual', and 'Family Services' (which is selected). There is a text input field for 'Enter Service, Organisation or Suburb' and a 'Submit' button.

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

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

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

The *Search* and *Favourites* radio buttons relate to the Service Seeker database (maintained by Infoxchange), the use of which is not recommended for FPP services. For assistance in identifying appropriate local service providers, please refer to [oneplace](#)

10.1 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 *FW*, to bring up the list of A&TSI Family Wellbeing services within ARC.
4. Select the required service from the dropdown list which appears.
5. Select **Submit**.

The screenshot shows the 'supporting families' interface. At the top, it says 'FPP Training 1' and 'Carissa Carrot Female, DOB: 21/04/1990 (Age 28 yrs)'. The user is 'A Coordinator (Coordinator)'. The 'Referrals' tab is active. On the left, there's a sidebar with 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The 'Persons' section shows a 'Recent List' with 'Carissa Carrot', 'Margerie Mandarin', 'Bev Banana', and 'Charles Carrot'. The main area shows 'Referrals' for 'Carissa Carrot' with a message: 'This person has no history of referrals on record'. On the right, the 'Referral' form is visible. It has radio buttons for 'Search', 'Favourites', 'Manual', and 'Family Services' (which is selected and circled in red). Below this is a 'Send referral to' dropdown with 'Hamilton Island FW' selected. A 'Submit' button is circled in red. Below the dropdown is a 'Service Details' section with fields for 'Service Name' (Hamilton Island FW), 'Organisation' (FW Training 1), 'Address' (Hamilton Island QLD 4202), and 'Phone 1' (07 1234 1234).


The **Referral** form appears.

The 'Referral' form is shown with the following sections and fields:

- Status:** New referral
- Linked Case Summary:** A blue bar with a toggle icon. Below it, a message says 'Please click Save Draft button to enable Case Summary to link'.
- From:** FPP Training 1
- To:** Hamilton Island FW
- Service:** Hamilton Island FW
- Program / Group:** A text input field.
- Organisation:** FW Training 1
- For:** Carissa Carrot
- Referred Persons:** A blue bar with a toggle icon. Below it, a message says 'Please click Save Draft button to associate people'.
- Details:** A blue bar with a toggle icon. It contains:
 - * Service Type: A dropdown menu.
 - Presenting issues: A text input field.
 - Additional Information: A text input field.
- Attachments:** A blue bar with a toggle icon. Below it, a message says 'Please click Save Draft button to enable documents to be attached'.
- Referral History:** A blue bar with a toggle icon. It contains:
 - * Consent to refer: Radio buttons for 'Yes' and 'No' (selected).
 - Date consent received: A date picker.
 - Who provided consent to refer: A text input field.
 - Comment: A text input field.
- Buttons:** 'Save Draft' and 'Send' at the bottom.

6. Select **Service Type ***, then click **Save Draft** at the bottom of the form.
Service Type is required for your service reporting.
 The Referral will not save if this field has not been completed.

The screenshot shows the 'Referral' form with the status 'New referral'. The 'Service' is 'Hamilton Island FW'. The 'Organisation' is 'FW Training 1'. The 'For Carissa Carrot' field is highlighted. The 'Referred Persons' section has a message: 'Please click Save Draft button to associate people'. The 'Details' section shows the '* Service Type' dropdown menu with three options: 'Referred - ATSI Family Wellbeing', 'Referred - Family and Child Connect', and 'Referred - Intensive Family Support'. The 'Presenting issues' field is also visible.

7. The referral has automatically included the details of the Person record you are in.
 Click on the  icon in the **Referred Persons** section to attach the other Persons in the Case also being referred.

The screenshot shows the 'Referral' form with the status 'Draft'. The 'Linked Case Summary' is 'Carrot (14/01/2019 -)'. The 'From FPP Training 1' and 'To Hamilton Island FW' fields are highlighted. The 'Service' is 'Hamilton Island FW'. The 'Organisation' is 'FW Training 1'. The 'For Carissa Carrot' field is highlighted. The 'Referred Persons' section has a message: 'Please click Save Draft button to associate people'. The 'Additional associated clients' section has a plus icon. The 'Details' section shows the '* Service Type' dropdown menu with the option 'Referred - ATSI Family Wellbeing'.

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

Click the **Related** search button to easily display related persons to add to the referral.

Note : It may be that only some of the Persons with whom relationships are held are included in the Case and/or relevant to the referral being recorded.

For Carissa Carrot

Referred Persons

Additional associated clients

Person Search and Select

☐ My List
 ☐ Team List
 ☒ Related
 ☐ Recent
 ☐ Search

☒ Crystal Carrot F 08/08/2008
☒ Charles Carrot M 02/06/1984

GO a-z i Save Cancel

Simply, tick the checkbox as appropriate, then click **Save**.
The selected Persons are now linked to the Case Summary.

For Carissa Carrot		
Referred Persons		
Additional associated clients		Relationship
Charles Carrot		Husband
Crystal Carrot		Daughter

9. Enter relevant details for **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.

Attachments

Client File Select & Upload

There are no files associated with this document.
To upload, click the upload button or in newer browsers drag and drop files here.

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**.

Export Person Details

Export Person Details

Document Title Carissa Carrot Client File

Person Information	Include
Name, Sex, DOB	<input checked="" type="checkbox"/>
Alias Details	<input type="checkbox"/>
Demographic Details	<input checked="" type="checkbox"/>
Current Relationships	<input checked="" type="checkbox"/>
Addresses View Prior	
*115 Frangipani Drive TOWNSVILLE 4810 (Home)	<input checked="" type="checkbox"/>
45 Greenslopes Terrace MAGNETIC ISLAND 4819 (Alternative)	<input checked="" type="checkbox"/>
Contacts View Prior	
0412 223 223 (Mobile)	<input checked="" type="checkbox"/>
5656 9876 (Emergency Contact)	<input checked="" type="checkbox"/>
5523 6987 (Phone (Hm))	<input checked="" type="checkbox"/>
Profiles View Prior	
Cases	
Carrot (FPP Case Summary 14/01/2019 -)	<input checked="" type="checkbox"/>
Key Workers	
Trevor Turtle, CSO (Townsville CSSC)	<input checked="" type="checkbox"/>
A Coordinator, Lead facilitator (FPP Training 1)	<input checked="" type="checkbox"/>
Additional Details	
Select All	<input type="checkbox"/>
Notes	<input type="checkbox"/>
Supports	<input type="checkbox"/>
Alerts	<input type="checkbox"/>
Plans	<input type="checkbox"/>
Tasks	<input type="checkbox"/>
Documents	<input type="checkbox"/>
Include worker name details <input checked="" type="radio"/> Yes <input type="radio"/> No	
Additional Notes	
Attach file	

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

Attachments

Client File [Select & Upload](#)

File Name	Uploaded
client_file_6378.pdf	14/01/2019 12:08:35 AEST

You can attach other documents as relevant from your network drive by clicking [Select & Upload](#).

To remove any documents from the Referral, simply click the red cross.

Attachments

Client File [Select & Upload](#)

File Name	Uploaded
Carrot Family Genogram.docx	14/01/2019 12:10:31 AEST
client_file_6378.pdf	14/01/2019 12:08:35 AEST

13. **Consent to refer*** must be provided - complete the 2 mandatory fields to capture when the consent was received and from whom.

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**.

The Referral record will show on the **Person** page, **Referral** tab for all Persons included in the referral
- as above for Carissa**AND**
- as below for each of Charles and Crystal'S records.

ARC User Manual for Family Participation Program

supporting families FPP Training 1
Charles Carrot Male, DOB: 02/06/1984 (Age 34 yrs)

Home Search Details Notes Supports Alerts Referrals Plans Tasks Documents

Persons Referrals Create new Referral

	Id	Referral Date ↓	Status	From	To
	184	14/01/2019	Waiting	FPP Training 1 FPP Training 1	Hamilton Island FW FW Training 1

1 to 1 of 1 results

supporting families FPP Training 1
Crystal Carrot Female, DOB: 08/08/2008 (Age 10 yrs)

Home Search Details Notes Supports Alerts Referrals Plans Tasks Documents

Persons Referrals Create new Referral

	Id	Referral Date ↓	Status	From	To
	184	14/01/2019	Waiting	FPP Training 1 FPP Training 1	Hamilton Island FW FW Training 1

1 to 1 of 1 results

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

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

supporting families FPP Training 1
Advice, Referral and Case Management (ARC)

Home My List Team List My Actions Team Actions Referrals

Persons Sent Draft

Days

Cases Referrals

	Id ↓	Send Date	Status	Sent From	Sent To	Sent By	Client
	184	14/01/2019 12:13:00	Waiting	FPP Training 1 FPP Training 1	Hamilton Island FW FW Training 1	A Coordinator	Carissa Carrot DOB: 21/04/1990 Gender: female

Recent List
Crystal Carrot
Carissa Carrot
Charles Carrot
Margerie Mandarin
Bev Banana

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*.

10.2 Record a Manual Referral

Manual referrals are used to **record** referrals made to services not using ARC eg. local specialists.

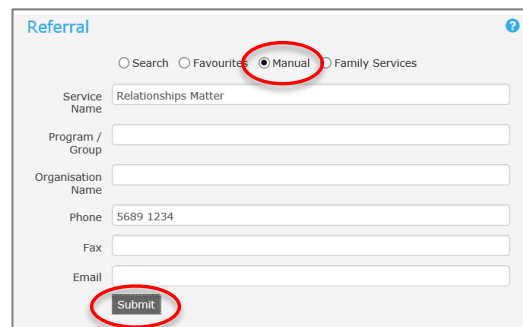
IMPORTANT NOTE : Notification of the referral and associated documents **must be sent separately via channels (eg. email, post, fax) external to ARC.**

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

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 screenshot shows the 'Referral' form with the following fields and options:

- Radio buttons: ☐ Search, ☐ Favourites, ☒ Manual, ☐ Family Services
- Text fields: Service Name (Relationships Matter), Program / Group, Organisation Name, Phone (5689 1234), Fax, Email
- Buttons: Submit (highlighted with a red circle)

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.



The screenshot shows the full 'Referral' form with the following sections:

- Message Box:** This type of referral will NOT be sent electronically. You may wish to PDF the referral and send this manually to the destination service.
- Status:** New referral
- Linked Case Summary:** Please click Save Draft button to enable Case Summary to link
- From:** FPP Training 1
- To:** Relationships Matter
- Service:** Relationships Matter
- Program / Group:**
- Organisation:**
- Phone:** 5689 1234
- Fax:**
- Email:**
- For:** Margerie Mandarin
- Referred Persons:** Please click Save Draft button to associate people
- Details:**
 - * Service Type: [dropdown]
 - Presenting issues: [text area]
 - Additional Information: [text area]
- Attachments:** Please click Save Draft button to enable documents to be attached
- Referral History:**
 - * Consent to refer: ☐ Yes ☒ No
 - Date consent received: [calendar]
 - Who provided consent to refer: [text area]
 - Comment: [text area]

2. 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

* Service Type


Presenting issues

Additional Information

Attachments

- Referred - Domestic and Family Violence
- Referred - Substance Misuse
- Referred - Mental Health Child
- Referred - Mental Health Adult
- Referred - Disability
- Referred - Youth
- Referred - Health
- Referred - Other Child and Family Support
- Referred - Other

3. The Referral is automatically linked to that Person record.

To record the referral for other family members included in the referral, click on the  icon to attach the other Persons (in the Case) to the referral.

For Margerie Mandarin

Referred Persons

Additional associated clients

4. Using the **Related** search button, select the Persons to be included in the referral.
Note : It may be that only some of the Persons with whom relationships are held are included in the Case. Click **Save**.

For Margerie Mandarin

Referred Persons

Additional associated clients

Person Search and Select

My List

Recent

Search

Team List

Related

Nigella Mandarin F 03/03/1950

Mark Mandarin M 20/01/2010

GO a-z i Save Cancel

The selected Persons are now included in the Referral.

For Margerie Mandarin

Referred Persons


Additional associated clients


Relationship

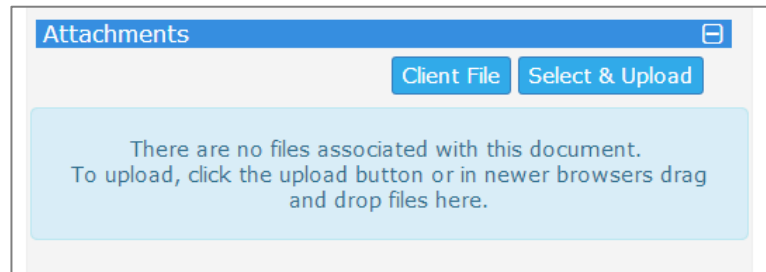
Nigella Mandarin

Mother

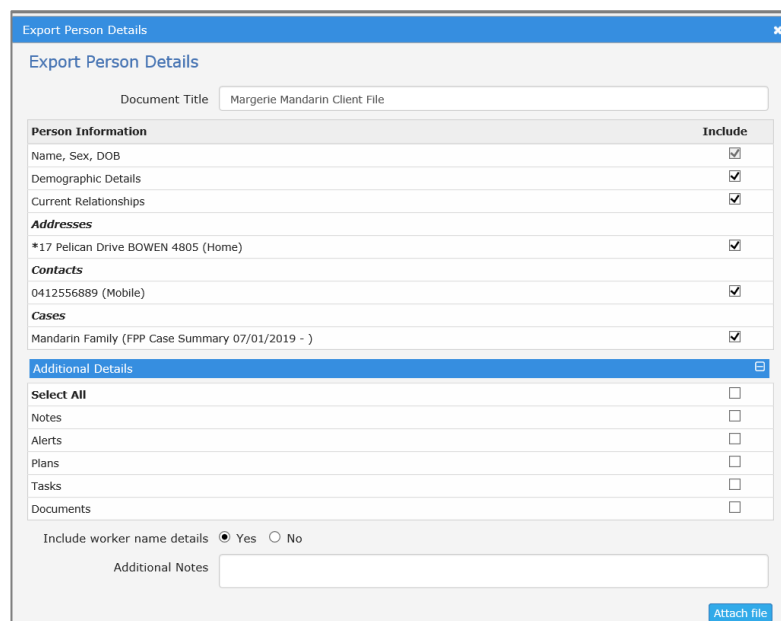
5. Record details about why you are making the referral in the **Presenting Issues** section. Add **Additional Information** if required.
6. Select **Save Draft**.

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.

7. To create a record of the files provided with the referral, expand the **Attachments** segment by selecting the  icon. You can select to attach documentation from the **Client File** or **Browse / Select & Upload** from files located on the user's computer (external to ARC)

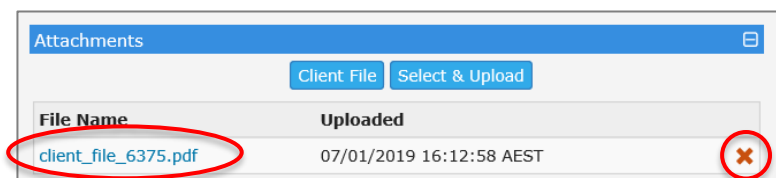


8. If you select **Client File**, simply tick the information you wish to attach to the referral. Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes** and select **Attach file**.



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

Any documents attached to the Case Summary will also be automatically included in the referral. You can attach other document from your network drive by simply clicking [Select & Upload](#). You can remove documents from the referral record by clicking the red cross.



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

Referral History

*Consent to refer ☒ Yes ☐ No

*Date consent received 02/01/2019

*Who provided consent to refer Margerie and Nigella

Comment

Status to: Save Draft PDF Delet **Waiting**

10. 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 OK

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

supporting families FPP Training 1 Margerie Mandarin Female, DOB: 21/04/1980 (Age 38 yrs)

Home Search Details Notes Supports Alerts Referrals Plans Tasks Documents

Referrals

Id	Referral Date	Status	From	To
186	14/01/2019	Waiting	FPP Training 1	Relationships Matter

1 to 1 of 1 results

Referral

This type of referral will NOT be sent electronically. You may wish to PDF the referral and send this manually to the destination service.

Referral sent 14/01/2019 12:48:12 AEST

Status: Waiting

Linked Case Summary

Mandarin (08/01/2019 -)

From FPP Training 1

To Relationships Matter

Service Relationships Matter

Phone 5689 5689

For Margerie Mandarin

Referred Persons

Additional associated clients	Relationship
Mark Mandarin	Son

Details

* Service Type Referred - Other Child and Family Support

Attachments

File Name	Uploaded
client_file_6375.pdf	14/01/2019 12:47:47 AEST

Referral History

Referral sent by A Coordinator, FPP Training 1 12:48pm AEST Mon 14/01/19

*Consent to refer Yes

Date consent received 14/01/2019

Who provided consent to refer Margerie

Comment

Status to: Update Recall PDF **Accepted Declined**


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

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

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

supporting families

FPP Training 1

Margerie Mandarin Female, DOB: 21/04/1980 (Age 38 yrs) 

Home

Search

Details

Notes

Supports

Alerts

Referrals

Plans

Tasks

Documents

Persons

Referrals



Create new Referral

Days

Cases

Reports

Admin

	Id	Referral Date ↓	Status	From	To
	186	14/01/2019	Accepted	FPP Training 1 FPP Training 1	Relationships Matter
	187	14/01/2019	Waiting	FPP Training 1 FPP Training 1	Hamilton Island FW FW Training 1

supporting families

FPP Training 1

Mark Mandarin Male, DOB: 20/01/2010 (Age 8 yrs) ⚠

Home

Search

Details

Notes

Supports

Alerts

Referrals

Plans

Tasks

Documents

Persons

Referrals



Create new Referral

Days

Cases

Reports

Admin

	Id	Referral Date ↓	Status	From	To
	186	14/01/2019	Accepted	FPP Training 1 FPP Training 1	Relationships Matter
	187	14/01/2019	Waiting	FPP Training 1 FPP Training 1	Hamilton Island FW FW Training 1

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

supporting families

FPP Training 1

Advice, Referral and Case Management (ARC)

Home

My List

Team List

My Actions

Team Actions

Referrals

Persons

Sent

Draft

Days

Cases

Reports

Admin

Recent List

Mark Mandarin

Margerie Mandarin




Crystal Carrot

Carissa Carrot

Charles Carrot

Bev Banana

Referrals

	Id ↓	Send Date	Status	Sent From	Sent To	Sent By	Client
	187	14/01/2019 12:51:30	Waiting	FPP Training 1	Hamilton Island FW FW Training 1	A Coordinator	Margerie Mandarin DOB: 21/04/1980 Gender: female
	186	14/01/2019 12:48:12	Accepted	FPP Training 1	Relationships Matter	A Coordinator	Margerie Mandarin DOB: 21/04/1980 Gender: female
	184	14/01/2019 12:13:00	Waiting	FPP Training 1	Hamilton Island FW FW Training 1	A Coordinator	Carissa Carrot DOB: 21/04/1990 Gender: female

The status of **all** Referrals made to another service are shown on the **Home** Page, **Referrals** tab, on the **Sent** sub-tab.

10.3 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.

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.

The screenshot shows the 'supporting families' interface for a user named Margerie Mandarin. The 'Referrals' tab is active, and the 'View Recalled and Declined' button is circled in red. Below the main referrals table, a 'Recalled and Declined' section is highlighted with a red box, showing a referral with status 'Declined'.

Id	Referral Date ↓	Status	From	To
186	14/01/2019	Accepted	FPP Training 1 FPP Training 1	Relationships Matter

1 to 1 of 1 results

Recalled and Declined				
Id	Referral Date ↓	Status	From	To
187	14/01/2019	Declined	FPP Training 1 FPP Training 1	Hamilton Island FW FW Training 1

10.4 Receiving Referrals from Child Safety

Referrals received from Child Safety (via the [Queensland family support referral](#) online referral form), will show in the **Referrals** tab, on the **Home** page. This tab is only visible to those with a *Coordinator* user profile.

These referrals show on the **Received** sub-tab. Referrals that have been Accepted, Sent or have yet to be sent (ie. are in Draft format) can be viewed by clicking the relevant sub-tab.

1. On the **Home** page, select **Referrals** tab.

FPP Training 1
Advice, Referral and Case Management (ARC)

Home My List Team List My Actions Team Actions **Referrals**

Persons Days Cases Reports Admin

Recent List

Received Accepted Declined Sent Draft

Id	Send Date	Status	Sent From	Sent By	Client
5836	09/09/2019 10:50:19	Waiting QQQQ-WNT8	familychildconnect online	Mary Mushroom	Byron Banana DOB: 01/01/2016 Gender: male
5835	09/09/2019 10:30:32	Waiting 22DD-7N57	familychildconnect online	Kerry Koala	Lindy Lime DOB: 01/01/2011 Gender: female

2. To receive a referral, on the **Received** sub-tab, select the icon to open the referral form. The referral opens on the right-hand side of your screen.

FPP Training 1
Advice, Referral and Case Management (ARC)

A Coordinator (Coordinator)

Home My List Team List My Actions Team Actions **Referrals**

Persons Days Cases Reports Admin

Recent List

Received Accepted Declined Sent Draft

Id	Send Date	Status	Sent From	Sent By	Client
5836	09/09/2019 10:50:19	Waiting QQQQ-WNT8	familychildconnect online	Mary Mushroom	Byron Banana DOB: 01/01/2016 Gender: male
5835	09/09/2019 10:30:32	Waiting 22DD-7N57	familychildconnect online	Kerry Koala	Lindy Lime DOB: 01/01/2011 Gender: female

1 to 2 of 2 results

Family name search GO

Referral

Link referral to database

This external referral is not yet associated with a Person on your database. If you plan to accept this referral you must first create a Person record, or associate the referral with an existing Person.

Given name: Byron Family name: Banana

☒ Fuzzy

This person does not appear to be in the database. You might want to make sure by modifying the search criteria. If you are not sure about the spelling try using the % symbol as a wildcard.

Add Byron Banana as new Person

Referral sent 09/09/2019 10:50:19 AEST

Status Waiting

Reference number QQQQ-WNT8

From familychildconnect online

To FPP Training 1



Service FPP Training 1

3. Scroll to the bottom of the form and click **Acknowledge**.
This updates the *Status* of the referral to indicate that someone in your service is in the process of receiving this referral.

This screenshot shows the bottom section of the referral form. It includes an 'Attachments' table with one entry: 'Referral_QQQQ-WNT8.pdf' uploaded on '09/09/2019 10:50:21 AEST'. Below this is a 'Referral History' section with a 'Comment' text area. At the bottom, there are three buttons: 'Acknowledge' (circled in red), 'Update', and 'PDF'.

4. Review the referral.

This screenshot shows the full 'Referral' form. It includes sections for 'Link referral to database' (with a warning message), 'Given name' (Byron) and 'Family name' (Banana), a 'Fuzzy' search option, and a message stating 'This person does not appear to be in the database...'. Below this is a 'Referral sent' timestamp, 'Status' (Acknowledged), 'Reference number' (QQQQ-WNT8), 'From' (familychildconnect online), 'To' (FPP Training 1), 'Service' (FPP Training 1), and 'Organisation' (Hamilton Island FPP). There is a section 'For Byron Banana' and 'Referred Persons' table with entries for Barbie Banana (Mother) and Bianca Banana (Sister). The 'Details' section contains 'Risk/Safety Factors' and 'Family Support' questions and answers. At the bottom, there is an 'Attachments' table with one entry: 'Referral_QQQQ-WNT8.pdf' (circled in red), uploaded on '09/09/2019 10:50:21 AEST'. Below this is a 'Referral History' section with a comment: 'Referral acknowledged by A Coordinator, FPP Training 1' on '10:59am AEST Mon 09/09/19'. At the very bottom are 'Update' and 'PDF' buttons.

- you can expand / collapse each of the sections using the  

- a pdf of the complete referral is available in the [Attachments](#) section. Any documents sent from Child Safety will also appear here.

5. To receive the referral, it needs to be attached to a Person record.
It is important to perform a wide search to identify if a Person record exists for the referred person : **use the % wildcard on a shortened version of the Given name and Family name**, click **Search**.

Referral

Link referral to database

This external referral is not yet associated with a Person on your database. If you plan to accept this referral you must first create a Person record, or associate the referral with an existing Person.

Given name: B% Family name: Ban%

☒ Fuzzy Search

First Name	Last Name	Gender	DOB
Brian	Banana	Male	01/01/2016

Add Byron Banana as new Person

Referral sent 09/09/2019 10:50:19 AEST

Where a potential match is identified, it displays as above.

Click the white person icon to check the current record in your workgroup with that Name –
Note: you will need to navigate back to the **Home Page**, **Referrals** tab to resume processing your received referral.

Where it is for the same Person (an exact match), click the blue [link](#) icon.

6. If no existing records are returned, select **Add < Name> as a new Person**.

Referral

Link referral to database

This external referral is not yet associated with a Person on your database. If you plan to accept this referral you must first create a Person record, or associate the referral with an existing Person.

Given name: B% Family name: Ban%

☒ Fuzzy Search

First Name	Last Name	Gender	DOB
Brian	Banana	Male	01/01/2016

Add Byron Banana as new Person

Referral sent 09/09/2019 10:50:19 AEST

7. Scroll to the bottom of the referral, click **Accept**.

Referral History

Referral acknowledged by A Coordinator, FPP Training 1 10:59am AEST Mon 09/09/19

Comment

Update Accept PDF

Referrals from [Queensland family support referral form](#) are not able to be declined, as there is no automated mechanism to advise the referrer of this decision. You need to **Accept** the referral in ARC and contact the Child Safety officer to advise them of your decision. Your time is managing this is captured in a Note.

Should the referral be outside your catchment area, please notify ATSIfamilies@cyjma.qld.gov.au immediately.

8. When you have Accepted the referral, click on the blue icon appearing beside the names of the other Person/s in the referral to create a Person record for them in your workgroup.

Additional associated clients	Relationship
Barbie Banana	Mother
Bianca Banana	Sister

The following message will appear :

Given name: B% Family name: Ban%

☒ Fuzzy Search

This person does not appear to be in the database. You might want to make sure by modifying the search criteria. If you are not sure about the spelling try using the % symbol as a wildcard.

Add Barbie Banana as new Person Cancel

To avoid duplicate Person records, it is always recommended to Search first. When you are confident that a record does not already exist for this Person, click **Add...as new Person**.

The following message will appear:

Are you sure you wish to create a link to a new person in your database

Cancel **OK**

When you click **OK**, a new Person record will be created in your workgroup for that person. Once this has been done, the Referral form will display as below:

Additional associated clients	Relationship
Person Linked	
Barbie Banana	Mother
Bianca Banana	Sister

Repeat this step for all Persons associated with the referral.

9. The referral now displays on the **Accepted** sub-tab on the **Referrals** tab, **Home** page.

The screenshot shows the 'supporting families' ARC interface. The 'Referrals' tab is selected, and the 'Accepted' sub-tab is active. A table lists one referral with the following details:

Id	Send Date	Status	Sent From	Sent By	Client
5836	09/09/2019 10:50:19	Accepted QQQQ-WNT8	familychildconnect online	Mary Mushroom	Byron Banana DOB: 01/01/2016 Gender: male

1 to 1 of 1 results

The referral is also linked to each Person associated with the referral – access to documents within the referral is easily managed electronically :

The following three screenshots show the 'Referrals' tab for different persons, all displaying the same referral (ID 5836) with status 'Accepted'.

Byron Banana (Male, Age 3 yrs (Approx))

Id	Referral Date	Status	From	To
5836	09/09/2019	Accepted	familychildconnect online	FPP Training 1 Hamilton Island FPP

1 to 1 of 1 results

Bianca Banana (Female, Age 20 mths (Approx))

Id	Referral Date	Status	From	To
5836	09/09/2019	Accepted	familychildconnect online	FPP Training 1 Hamilton Island FPP

1 to 1 of 1 results

Barbie Banana (Female, Age 35 yrs (Approx))

Id	Referral Date	Status	From	To
5836	09/09/2019	Accepted	familychildconnect online	FPP Training 1 Hamilton Island FPP

1 to 1 of 1 results

10. Complete receiving the referral in ARC in line with normal procedures :
- On the **Persons** page, **Details** tab -
- > ensure all Persons are connected – reflected in *Relationships* on each Person record
 - > confirm Address, Contact and other information as available
 - > create the **Case Summary**, ensuring all Persons are added.

supporting families FPP Training 1 Barbie Banana Female, Age 35 yrs (Approx) A Coordinator (Coordinator)

Search Details Notes Supports Alerts Referrals Plans Tasks Documents

View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Barbie Banana	Primary Name	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Byron Banana	Son	01/01/2016	
Blanca Banana	Daughter	01/01/2018	

Profiles: Create new profile

No profiles exist

Cases: Create new Case

Description	Role	Workgroup	Start	Last Update
FPP Case Summary				
Banana	Primary Carer	FPP Training 1	09/09/2019	09/09/2019

Address: Create new address

Street	Locality	Type	Comments	Last Update
45 Far Plains Road	MOUNT ISA QLD 4825	Home		09/09/2019

Phone & other contacts: Create new econtact

Contact	Type	Comments	Last Update
0412112223			09/09/2019

FPP Case Summary

* Description: Banana

Person	Role	Start Date	End Date
Barbie Banana	Primary Carer	09/09/2019	
Blanca Banana	Referred child	09/09/2019	
Byron Banana	Referred child	09/09/2019	

Summary of details For Case closure

*Source of referral: Child Safety

*I&A Event ID: 56564321

FPP Referral Date: 06/09/2019

*Case Worker: A Coordinator

*Case Start Date: 09/09/2019

*Type of referral: I&A - CINOP decision

Response to FPP referral: Accepted

Status: Open

Additional Notes:

- Each Case Summary can be allocated to a Case Worker – viewed and managed from the **Cases** Page.

supporting families FPP Training 1 Advice, Referral and Case Management (ARC)

FPP Case Summary

Records: 20 Show Filters Create New FPP Case Summary

FPP Case List

Description	Case Worker	Status	Type of referral	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana	A Coordinator	Open	I&A - CINOP decision	06/09/2019	09/09/2019		

A worker's **My List** only displays **Person** records for which they have been allocated as **Key Worker**.

10.4.1 To decline a Referral

As noted above, referrals received from [Queensland family support referral form](#) must be 'accepted' in ARC.

Where you receive a referral from Child Safety which your service is unable to accept, simply complete the following steps:

1. Receive the referral following the steps outlined above:
 - the referral must be 'Accepted' in ARC
 - only add the Person record for the referred Person (not for all associated Persons)
 - contact the Child Safety officer to discuss why your service is not able to accept this referral and record this conversation and the associated time with a Note on that Person's record...

The screenshot shows the ARC system interface for a person named Lindy Lime. The 'Notes' tab is highlighted with a red circle. The interface displays a list of notes and an 'Edit Note Details' panel on the right. The note content is: 'Contacted CSO, Trevor Tomato, regarding this referral. Discussed the reasons why it is not appropriate for this service to accept the FPP referral. Trevor acknowledged this and will progress with the family.'

For completeness, it is also recommend that you include this as a **Comment** on the Referral :

- > scroll to the bottom of the referral form
- > enter details in the blank **Comment** box
- > click **Update**

The screenshot shows the 'Referral History' section of the ARC system interface. The 'Comment' box is highlighted with a red circle, and the 'Update' button is also highlighted with a red circle. The comment text is: 'Advised Trevor that referral can not be accepted by our service.'

11 Managing Restricted Access

It is acknowledged that, on occasion, client sensitivities require that access to client records be restricted for certain workers within your service.

This section outlines the functionality that has been developed by Infoexchange to enable this.

11.1 Apply Restricted Access

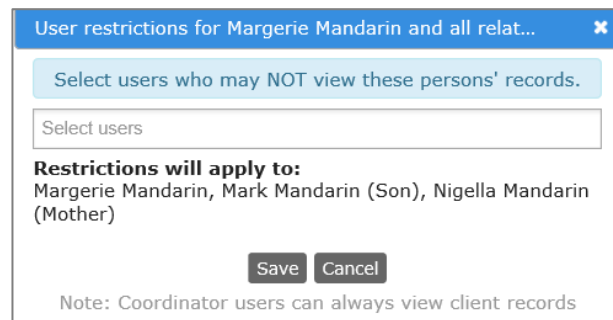
Access to Person records can only be restricted for NORMAL users ie. Coordinators can access all records within your workgroup.

Only those with Coordinator access are able to apply and remove restrictions relevant to Normal users.

1. Open **Person** Page and display **Details** tab for the Person record requiring access to be restricted.
Click the **Restriction** button at the bottom.

The screenshot shows the 'supporting families' web application interface. The top navigation bar includes 'Home', 'Search', 'Details' (highlighted with a red circle), 'Notes', 'Supports', 'Alerts', 'Referrals', 'Plans', 'Tasks', and 'Documents'. The left sidebar lists 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. Below 'Admin', there is a 'Recent List' with names: Margerie Mandarin, Mark Mandarin, Crystal Carrot, Carissa Carrot, Charles Carrot, and Bev Banana. The main content area is titled 'View Primary Details' for 'Margerie Mandarin'. It includes sections for 'Person / Alias', 'Relationships', 'Profiles', 'Cases', 'Address', 'Phone & other contacts', and 'Key Workers'. The 'Key Workers' table lists 'K User' and 'Thomas Tomato'. At the bottom right, the 'Restriction' button is highlighted with a red circle, along with 'Export Details' and 'Refresh' buttons.

2. The following screen will appear :



User restrictions for Margerie Mandarin and all relat...

Select users who may NOT view these persons' records.

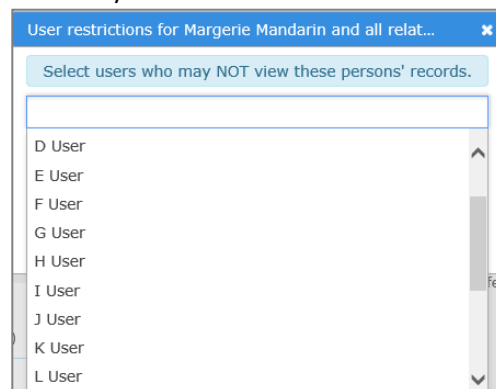
Select users

Restrictions will apply to:
Margerie Mandarin, Mark Mandarin (Son), Nigella Mandarin (Mother)

Save Cancel

Note: Coordinator users can always view client records

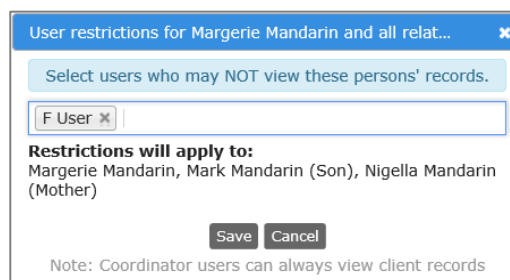
- Click in the **Select users** field to display workers (with Normal User access) in your service. Select worker/s for whom access is to be restricted.



User restrictions for Margerie Mandarin and all relat...

Select users who may NOT view these persons' records.

D User
E User
F User
G User
H User
I User
J User
K User
L User



User restrictions for Margerie Mandarin and all relat...

Select users who may NOT view these persons' records.

F User x

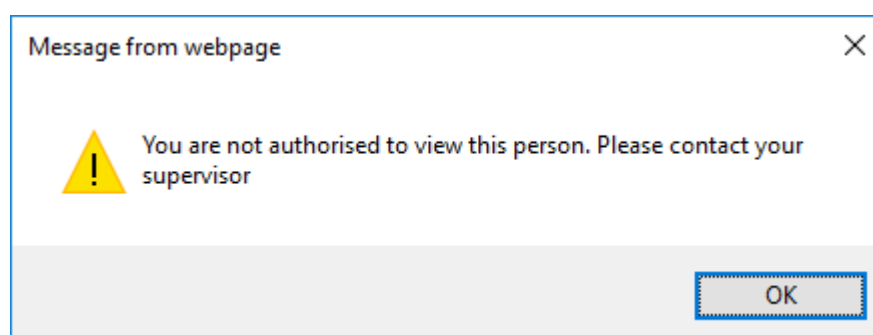
Restrictions will apply to:
Margerie Mandarin, Mark Mandarin (Son), Nigella Mandarin (Mother)

Save Cancel


Note: Coordinator users can always view client records

Click **Save**.

When **F User** attempts to access Margerie Mandarin's record (or any records for those Persons with whom a Relationship is recorded), this message is displayed :



Message from webpage

 You are not authorised to view this person. Please contact your supervisor

OK

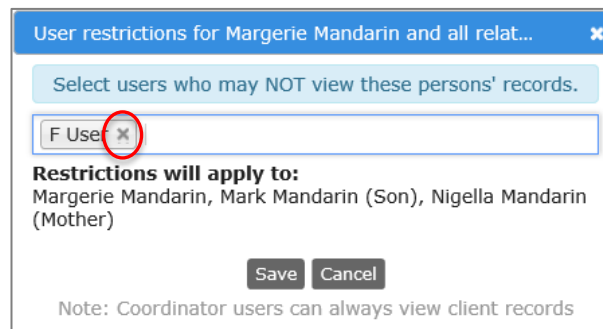
Key points :

- Normal Users can only view lists they have generated. Identifying details and unstructured data is not included in lists run by Normal Users.
- Normal Users can not access Associated Records from the Cases Page.
- If a worker creates a relationship with a Person for which they have access restricted, then they will activate a restriction for the Person record they are currently working on. You will need to contact your Coordinator to correct the relationship data for that Person.

11.2 Remove Restricted Access

To cancel Restricted Access for a worker applicable to a Person :

1. On the **Person** record, **Details** tab, simply click the [Restriction](#) button at the bottom of the page.
2. This screen will display showing the active restrictions.



3. Click the **x** against the worker's name (as shown above) and **Save**. The message pop-up will no longer display. The worker will now have access to that Person's record, and the Persons with whom that Person has Relationships recorded.

11.3 Restricted Access Audit Log

The **Admin** page, **Audit** tab displays the available audit log records.

Click on the **Person User Restrictions** sub-tab to display the following :

- Select the date range you wish to view restricted access activities for
- The **Worker** field refers to the User who applied or removed the restriction.
- The **Person ID** field is the numerical *Person Identifier* for the Person record for whom access has been restricted.

ARC User Manual for Family Participation Program

supporting families FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About Menu

Persons Person Views Person Updates Person User Restrictions Referral Views

Start Date 07/01/2019 End Date 07/01/2019 Person Id Worker A Coordinator Go

Search Results

Auditlog Id	Workgroup	Cluster	Access	Worker	Restricted Worker	Restricted Client Id	Action	Date Time	Then Restriction Id
14	FPP Training 1	Training1f	prohibit	A Coordinator	F User	6377	added	07/01/2019 16:39:44	12
13	FPP Training 1	Training1f	prohibit	A Coordinator	F User	6376	added	07/01/2019 16:39:44	12
12	FPP Training 1	Training1f	prohibit	A Coordinator	F User	6375	added	07/01/2019 16:39:44	12

supporting families FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About Menu

Persons Person Views Person Updates Person User Restrictions Referral Views

Start Date 07/01/2019 End Date 07/01/2019 Person Id 6375 Worker Please select... Go

Search Results

Auditlog Id	Workgroup	Cluster	Access	Worker	Restricted Worker	Restricted Client Id	Action	Date Time	Then Restriction Id
12	FPP Training 1	Training1f	prohibit	A Coordinator	F User	6375	added	07/01/2019 16:39:44	12

12 Days

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

supporting families FPP Training 1
Advice, Referral and Case Management (ARC)

Home **Notes** Supports Tasks

Persons List date 14/01/2019

Days

Cases

Reports

Admin

Recent List

Notes: Filter Create New Note

	Given Name	Family Name	DOB	Contact Type	
1	Carissa	Carrot	21/04/1990	Gain consent	
2	Charles	Carrot	02/06/1984	Gain consent	
3	Crystal	Carrot	08/08/2008	Gain consent	
4	Carissa	Carrot	21/04/1990	Child Safety consultation	
5	Charles	Carrot	02/06/1984	Child Safety consultation	
6	Crystal	Carrot	08/08/2008	Child Safety consultation	
7	Margerie	Mandarin	21/04/1980	Child Safety consultation	
8	Mark	Mandarin	20/01/2010	Child Safety consultation	

12.1 Navigating within the Days Page

When you select a tab (**Notes**, **Supports** 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 icon to open the **Person** 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.

12.2 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. 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 record.

supporting families FPP Training 1
Advice, Referral and Case Management (ARC)

Home Notes **Tasks**

Persons List date 06/01/2019

Days

Cases

Reports

Admin

Recent List
Bella Banana
Margerie Mandarin
Nigella Mandarin
Mark Mandarin

Tasks: No Tasks exist.

Create New Task

Search for person to create new Task for 06/01/2019

Given Name bella

Family Name

Sex ☐ Male ☐ Female

Fuzzy ☒

Search

or Select From Recent

Last 28 Days

Results

Given Name	Family Name	Sex	DOB	Match	
Bailey	Davis	Male	14/06/67	4	
Bella	Banana	Female	27/07/93	0	

13 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 [Merge](#) 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.

13.1 Documents on the Person record

To attach and manage documents on the Person record :

1. 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.

The screenshot shows the 'supporting families' interface. At the top, the user is logged in as 'FPP Training 1'. The main header shows the person's name 'Mark Mandarin', gender 'Male', and date of birth '20/01/2010 (Age 8 yrs)'. Below this is a navigation bar with tabs: Home, Search, Details, Notes, Supports, Alerts, Referrals, Plans, Tasks, and Documents. The 'Documents' tab is selected. On the left, there is a sidebar with a 'Recent List' of names: Mark Mandarin, Margerie Mandarin, Crystal Carrot, Carissa Carrot, Charles Carrot, and Bev Banana. The main content area shows a 'Documents' section with a 'No Documents to display' message. To the right of this section is a 'Create New Document' button, which is circled in red. Further right is the 'Edit Document Details' form. This form includes fields for 'Date' (14/01/2019), 'Bring Up' (empty), 'Worker/s' (A Coordinator, FPP Training 1), 'Document Type' (Attachment), 'Document' (empty), and 'Description' (empty). Below these fields is a table showing the document is associated with 'Margerie Mandarin' as the 'Mother'. At the bottom of the form are 'Save' and 'Save Final' buttons.

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.
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.

ARC User Manual for Family Participation Program

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

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**.

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

ARC User Manual for Family Participation Program

The screenshot shows the 'supporting families' web application interface. At the top, it displays 'FPP Training 1' and 'Mark Mandarin Male, DOB: 20/01/2010 (Age 8 yrs)'. The user is logged in as 'A Coordinator (Coordinator)'. The left sidebar contains navigation links: Home, Persons, Days, Cases, Reports, Admin, and a Recent List. The main content area is titled 'Documents' and shows a table with columns 'Date', 'Worker', and 'Document Type'. A single record is listed for 14/01/2019, created by 'A Coordinator', with the document type 'Attachment' and name 'Bowen State School report card - 2018'. To the right, the 'Document Details' panel shows fields for Date, Bring Up, Worker/s, Work group, Type, Document Name, Description, Edit locked (with a blue lock icon), and Last update. A 'View Document' button is at the bottom of the details panel.

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

- Click **View Document**.

The 'Edit Document Details' form contains the following fields and options: Date (09/01/2019), Bring Up (empty), Worker/s (A Coordinator, FPP Training 1), Document Type (Attachment), Document (Change...), Type (Other), and Description (Bowen State School Report - 2018). Below these, a section titled 'This document is associated with (tick):' shows a table with 'Name' (Margerie Mandarin), 'Relationship' (Mother), and an 'Associate record with:' checkbox. At the bottom, it states 'May be edited to 10/01/2019' and 'Last update A Coordinator, FPP Training 1 09/01/2019 14:50:30 AEST'. Action buttons include 'Save', 'Delete', 'Save Final', and 'View Document' (which is circled in red).

- The following message will pop-up :

The pop-up message box contains the following text: 'If you wish to make any changes to this document ensure you save them by going File > Save As and choose a location (not in the windows temp directory) You will then need to upload the document to SRS if you wish to keep the latest copy on record.' An 'OK' button is located at the bottom right.

Click OK.

Important Note: If you make changes to the document when you are viewing it, 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:

13. Click **Change**

Edit Document Details

Date: 09/01/2019

Bring Up:

* Worker/s: A Coordinator, FPP Training 1

Document Type: Attachment

Document: **Change...** School report 2018.docx (Max File Size: 5 MB)

Type: Other

Description: Bowen State School Report - 2018

This document is associated with (tick):

Name ↑	Relationship	Associate record with:
Margerie Mandarin	Mother	<input type="checkbox"/>

May be edited to 10/01/2019

Last update: A Coordinator, FPP Training 1
09/01/2019 14:50:30 AEST

Save Delete Save Final

View Document

14. The document attachment pop-up box will appear

Load File - Internet Explorer

https://srs-qld-families-training.infochangeapps.net.au/loadaddoc.php?notesid=8258&doctype=Attachment

Upload File

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.

Locate the new document to attach, click Upload File.

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

supporting families FPP Training 1 Mark Mandarin Male, DOB: 20/01/2010 (Age 8 yrs)

Home Persons Days Cases Reports Admin

Search Details Notes Alerts Referrals Plans Tasks Documents

Documents Filter Create New Document

Date ↑	Worker	Document Type
09/01/2019	A Coordinator	Attachment School report - Second Semester 2018.docx Bowen State School Report - 2018

Export Properties of Documents 1 to 1 of 1

Edit Document Details

Date 09/01/2019

Bring Up

* Worker/s A Coordinator, FPP Training 1

Document Type Attachment

Document School report - Second Semester 2018.docx (Max File Size: 5 MB)

Type Other

Description Bowen State School Report - 2018

This document is associated with (tick):

Name ↑	Relationship	Associate record with:
Margerie Mandarin	Mother	<input type="checkbox"/>

May be edited to 10/01/2019

Last update A Coordinator, FPP Training 1 09/01/2019 15:03:37 AEST

Save Delete Save Final

View Document

13.2 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.

13.3 Deleting Documents

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

Last update A Coordinator, FPP Training 1 09/01/2019 15:03:37 AEST

Save Delete Save Final

View Document

14 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.

14.1 Reports

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

14.1.1 Reports tab

The screenshot shows the 'supporting families' logo and the title 'FPP Training 5 Advice, Referral and Case Management (ARC)'. The navigation bar includes 'Home', 'Reports' (circled in red), 'Lists', 'Referrals', 'Custom', and 'Results'. The left sidebar has 'Persons', 'Days', 'Cases', 'Reports' (highlighted), and 'Admin'. The main content area has a 'Workgroup' dropdown set to 'FPP Training 5'. The 'Report type' dropdown (circled in red) is open, showing a list of report types. The 'Include in report' dropdown is also open, showing 'Please select'. The 'Period of Interest' dropdown is set to 'Please select'. The 'Start date' and 'End date' fields are present. The 'Report type' dropdown list includes: 'Please select', 'Demographic Report', 'Profile Report', 'Contact Report', 'Family Report (using relationships)', 'Plan Report', 'ARC Demographics Report', 'ARC Performance Report (FPP)', 'Contract Report (FPP)', and 'Service Hours by Worker / by Case' (which is highlighted with a red box).

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 **Contract Report** have been specifically developed for Family Participation Program services to assist in managing your service and streamline reporting requirements. These are currently under development by Infoxchange.

ARC Performance Report

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

Services can also run the 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.

Contract Report

The *Contract Report* supports the performance-based acquittal obligations of services.

The format of the report is in a similar format as required to be entered into the Department's Contract management system by service providers. The **Counting Rules** defined for each of the measures in the **Contract Report** are available on pages 100-101.

Services can also run the corresponding **Contract List** (from the *Lists* tab) which displays the individual records representing the totals included in the *Contract Report*, for data verification

and validation.

14.1.2 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 [Exporting Report Results](#))

Those currently available are generic to the SRS product and may not reflect components tailored for Family Participation Program services.

The screenshot shows the 'supporting families' web application. The top navigation bar includes 'Home', 'Reports', 'Lists' (selected), 'Referrals', 'Custom', and 'Results'. The main content area is titled 'FPP Training 1 Advice, Referral and Case Management (ARC)'. It features a sidebar with links to 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main area contains filters for 'Workgroup' (FPP Training 1), 'List type' (a dropdown menu), 'Include in report', 'Include Identifying Details', 'Period of Interest', and 'Start date'. The 'List type' dropdown is open, showing a list of options: 'Please select...', 'Demographic Details', 'Profile Details (by person)', 'Profile Details (by profile)', 'Contact Details (by person)', 'Contact Details (by contact)', 'Contact Totals (by person)', 'Family List (using relationships)', 'Payments', 'Payments (by family)', 'Plans', and 'Contact Summary'.

14.1.3 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 Family Participation Program services.

14.1.4 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.

14.2 Generating Reports and Lists

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

The screenshot shows the 'supporting families' application interface. On the left is a navigation menu with 'Reports' selected. The main area has tabs for 'Reports', 'Lists', 'Referrals', 'Custom', and 'Results'. Under the 'Reports' tab, there are fields for 'Workgroup' (set to 'FPP Training 1'), 'Report type' (with a dropdown menu open showing options like 'Demographic Report', 'Profile Report', 'Contact Report', 'Family Report (using relationships)', and 'Plan Report'), 'Include in report', and 'Period of Interest'.

2. 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.

This screenshot shows the 'Period of Interest' dropdown menu. The menu is open, displaying a list of pre-defined date ranges: Today, Last Week, This Month, Last Month, This Quarter, Last Quarter, This Six Months, Last Six Months, This Year, Last Year, This Financial Year, and Last Financial Year.

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

The screenshot shows the 'Generate Report' screen. The 'Workgroup' is 'FPP Training 1', 'Report type' is 'Contact Report', 'Include in report' is 'Persons with contact recorded with a specific worker...', 'Exclude File notes' is checked, 'Select Worker' is 'A Coordinator', and 'Period of Interest' is 'This Month'. The 'Start date' is '01/12/2018' and 'End date' is '12/12/2018'. The 'Generate Report' button is highlighted with a red circle. Below the button, a message states: '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: 2024. Please delete the report when no longer of use.'

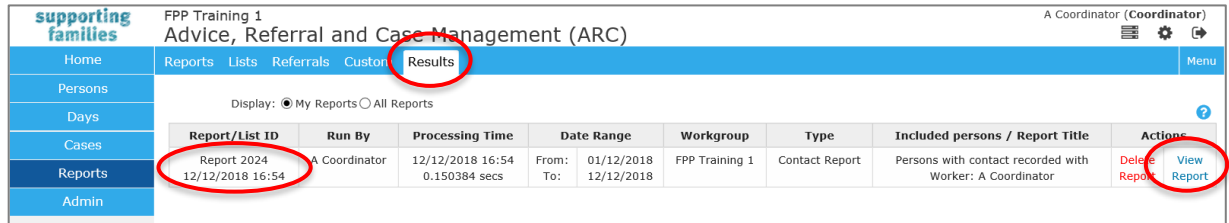
The report can be accessed from the **Results** tab using the report ID number (highlighted above).

14.3 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).




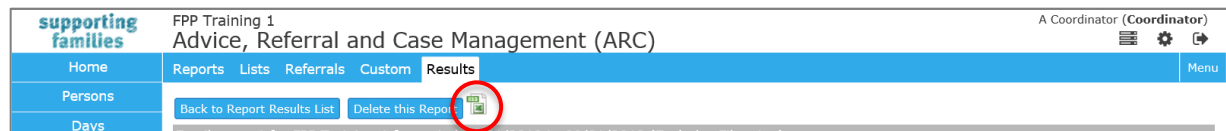
Report/List ID	Run By	Processing Time	Date Range	Workgroup	Type	Included persons / Report Title	Actions
Report 2024 12/12/2018 16:54	A Coordinator	12/12/2018 16:54 0.150384 secs	From: 01/12/2018 To: 12/12/2018	FPP Training 1	Contact Report	Persons with contact recorded with Worker: A Coordinator	Delete Report View Report

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.

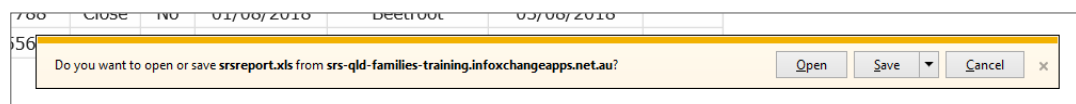
14.4 Exporting Report / List Results

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 at the top of the screen.



- 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.



14.5 Contract Report with counting rules

The **Contract Report** reflects each of the performance measures for Family Participation Program services, as documented within the *Families Investment Specification*.

Contract REPORT

Report Information

Service Outlet ID:	123456
Service Outlet Name:	FPP - UAT Service
Period From:	01/10/2023
Period To:	31/12/2023
Funding Area:	Families
Service Type No:	T601
Service Type:	Family Participation Program

PERFORMANCE

Measure No.	Measure Name	Response
IS35	Number of Service Users identifying as Aboriginal and/or Torres Strait Islander	14
IS39	Number of Service Users identifying as being from culturally and linguistically diverse backgrounds	0
IS132	Number of Service Users with cases commenced during the reporting period	0
IS133	Number of existing Service Users	18
IS145	Number of Service Users who have exited from the service	2
IS201	Number of referrals received	0

OUTCOMES

Measure No.	Measure Name	Response
OM3.1.01	Number of Service Users satisfied with supports provided	This result is not available from ARC. Please refer to the appropriate source to report against this measure.
OM3.1.02	Number of instances in which family participation support results in lower levels of involvement in the child protection system by the child and family	2

OUTPUTS

Measure No.	Measure Name	Response
A02.2.04	Number of Service Users who received a service during the reporting period	18

The following tables provide the counting rules defined for each of the measures for Family Participation Program services.

Important to note : An **active Case Summary** is one where the *Response to FPP referral* is **Accepted** and the *Date of consent to engage with FPP* is not blank.

PERFORMANCE

Measure No.	Measure Name	Counting rule
IS35	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.
IS39	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
IS132	Number of Service Users with cases commenced during the reporting period	Count each active Case Summary with a <i>Date of consent to engage FPP</i> within the reporting period.
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 active Case Summary closed within the reporting period where <i>Date of consent to engage FPP</i> is recorded.
IS201	Number of referrals received	Each Case Summary with a <i>Referral Date (for this service)</i> within the reporting period.

OUTCOMES

Measure No.	Measure Name	Counting rule
OM3.1.01	Number of Service Users satisfied with supports provided	This result is not available from ARC. Please refer to the appropriate source to report against this measure.
OM3.1.02	Number of instances in which family participation support results in lower levels of involvement in the child protection system by the child and family	Each active Case Summary closed within the reporting period where <i>Child Safety Decision</i> = CNINOP.

OUTPUTS

Measure No.	Measure Name	Counting rule
A02.2.04	Number of Service Users who received a service during the reporting period	Each active Case Summary that is open at the end of the period where the <i>Date of consent to engage</i> has been recorded + each active Case Summary closed during the reporting period where <i>Case closure reason = FLDM process completed, Child Safety notified FPP no longer appropriate or Family withdrew consent from FLDM process.</i>

It is strongly encouraged that services run the **Contract List** at the same time as they run the **Contract Report**, to review and verify recorded details.

15 Admin Page

The tabs within the **Admin** page allow users to manage their login, 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.

15.1 Change Password

On the **Admin** Page, select the **Password** tab :

To change your password:

1. Enter your **New Password** and enter again in the **Confirm Password** field.
The password should be at least 10 characters in length, contain 1 numeric character, 1 special character and 1 capital letter.
2. Click **Save**. Your password will now be updated.

Additional Notes:

- 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.

15.2 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.

ARC User Manual for Family Participation Program

supporting families FPP Training 1
Advice, Referral and Case Management (ARC)

Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About

Persons
Days
Cases
Reports
Admin

User preferences successfully updated.

User Preferences for A Coordinator

* Email Address

Phone

Mobile

Fax

Title

Position

Organisation

The security question is used, together with your email, to identify you if you forget your password. It is stored in encrypted format and cannot be read by others.

* Security question

* Security response

Your email address recorded in SRS may be used by Infoexchange to communicate with you regarding scheduled SRS downtime, feature upgrades or tips on the effective use of SRS. If you do not want Infoexchange to use your email for this purpose please tick the box below.

☐ I do not wish to receive these emails

Save Cancel

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

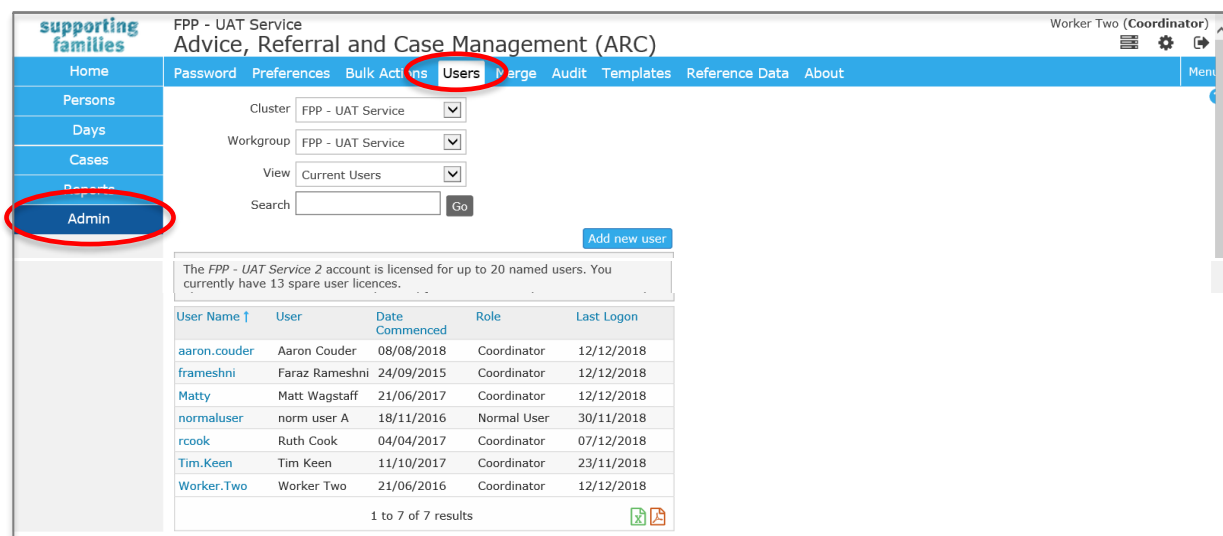
Important: You must update your details.

- A security question must be selected with a proper response.
- An email address must be provided.

OK

15.3 User Management

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



15.3.1 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, *FPP - UAT Service* has 20 named users and 13 spare licences. This means there are currently 7 allocated users.

If you have no 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 [Remove](#) them.

If you require additional licences, please contact the Family Participation Program team via ATSIfamilies@csyw.qld.gov.au 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. The [Add new user:](#) screen will open to the right of screen.

The screenshot shows the 'supporting families' logo on the top left. The main header reads 'FPP - UAT Service Advice, Referral and Case Management (ARC)'. Below this is a navigation bar with tabs: Home, Password, Preferences, Bulk Actions, **Users**, Merge, Audit, Templates, Reference Data, and About. A left sidebar contains links: Home, Persons, Days, Cases, Reports, and Admin. The main content area has filters for Cluster (FPP - UAT Service), Workgroup (FPP - UAT Service), View (Current Users), and a Search field with a 'Go' button. A red circle highlights the 'Add new user' button. To the right, the 'Add new user:' form is displayed with fields for * User Name, * First Name, * Last Name, Email Address, * Default Cluster (FPP - UAT Service), Start Date (12/12/2018), * New Password, * Confirm Password, User Blocked checkbox, Change password checkbox, and Last Update. A 'Save' button is at the bottom right of the form.

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 not 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:

* User Name

* First Name

* Last Name

Email Address

* Default Cluster

Start Date

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

Last Update Worker Two, FPP - UAT Service
12/12/2018 17:19:22

The worker 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, 7 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

* First Name

* Last Name

Email Address

* Default Cluster

Start Date

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

Last Update Worker Two, FPP - UAT Service
12/12/2018 17:19:22

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 non-current users or contact Infoxchange to negotiate your user license arrangements.

Step 4: Allocate the access level:

9. 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 User	Coordinator
Create Person and Relationships	✓	✓
Delete Person record	✗	✗
Create Case Summary	✓	✓
Manage Case (notes, plans, tasks etc)	✓	✓
Unlock Note and Documents	✗	✓
Delete Case Summary	✗	✗
Delete notes, plans, etc	✗	✓
Unlock Notes	✗	✓
Create/ Manage Referrals	✓	✓
Performance reporting – basic	✓	✓
Performance reporting – advanced	✗	✓
Manage Restricted Access	✗	✓
Merge Clients/ Persons	✗	✓
Auditing	✗	✓
Manage document templates	✗	✓
Manage Users	✗	✓

The screenshot shows the 'Edit user record' form. The 'Workgroup' dropdown menu is open, showing options: Administrator, Coordinator, Normal User (selected), Limited User, Reception, Reports Only, Roster, and Restricted. The 'Operational Remove' checkbox is checked and circled in red. Other fields include: * User Name (Roger.Robinhood), * First Name (Roger), * Last Name (Robinhood), Email Address, * Default Cluster (FPP - UAT Service), Start Date (12/12/2018), New Password, Confirm Password, User Blocked (unchecked), Change password (unchecked), and a 'Save' button at the bottom.

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.

15.3.2 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:

* User Name: Roger.Robinhood

* First Name: Roger

* Last Name: Robinhood

Email Address:

* Default Cluster: FPP - UAT Service

Start Date: 12/12/2018

New Password:

Confirm Password:

User Blocked: ☐

Change password: ☐

Workgroup	Role	Operational Remove
FPP - UAT Service	Normal User	<input checked="" type="checkbox"/>

Add to workgroup: Please select...

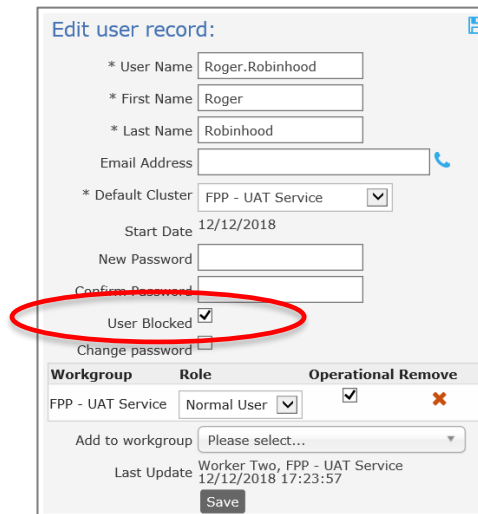
Last Update: Worker Two, FPP - UAT Service
12/12/2018 17:23:57

Save

2. Enter the **New Password** and re-enter the password in **Confirm Password**.
3. 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 not ticked.
4. Click **Save**.

15.3.3 Unblocking a User Account

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



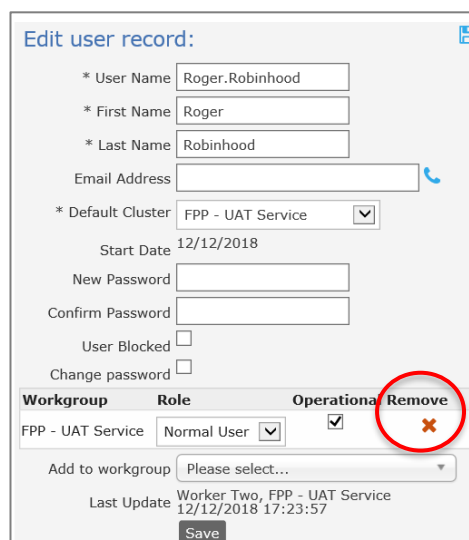
The screenshot shows the 'Edit user record' form for a user named Roger.Robinhood. The 'User Blocked' checkbox is checked and highlighted with a red circle. Below it, the 'Operational Remove' checkbox is also checked. The 'Save' button is at the bottom.

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

15.3.4 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 – all records made by this User within ARC are retained.

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'.

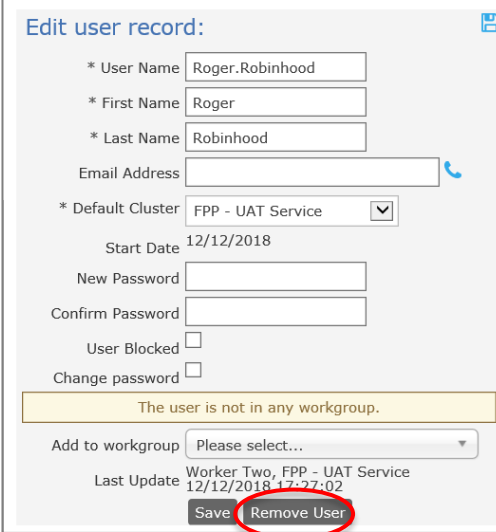


The screenshot shows the 'Edit user record' form for a user named Roger.Robinhood. The 'Operational Remove' checkbox is checked and highlighted with a red circle. The 'Save' button is at the bottom.

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

* First Name

* Last Name

Email Address

* Default Cluster

Start Date

New Password

Confirm Password

User Blocked ☐

Change password ☐

The user is not in any workgroup.

Add to workgroup

Last Update Worker Two, FPP - UAT Service
12/12/2018 17:27:02

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.

15.4 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.

15.4.1 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.

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.

View	Person ID	Given Name	Family Name	DOB	Alias?	View	Person ID	Given Name	Family Name	DOB	Alias?	Match	Merge
	8369	Mark	Mushroom	02/06/1982			8478	Mark	Mushroom	02/06/1982		6	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.

The screenshot displays the 'Merge Persons' sub-tab in the 'supporting families' system. It compares two potential duplicate records for a person named Mark Mushroom. The interface is split into two columns: 'Primary Record (details kept)' and 'Secondary (Merge) Record'. Both records share the same personal data: ID (8369 and 8478), Name (Mark Mushroom), Gender (male), Date of Birth (02/06/1982), Indigenous Status (Aboriginal), Country of birth, Language at Home, Australian South Sea Islander (No), Ancestry, Centrelink CRN, Comments, Date of Death, Primary diagnosed disability, Secondary diagnosed disability, and ICMS ID. The 'Last update' for both is 'Worker Two, FPP - UAT Service'. Below the personal details are sections for 'Addresses', 'Documents', 'Alias / Duplicates', and 'Validation Report'. The 'Merge' button at the bottom right is circled in red.

You can then proceed to merge the records, as outlined in the following section, by clicking on the blue **Merge** button – refer to the following section for the subsequent steps.

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.

15.4.2 To Merge two Person records

- Where you know the specific records required to be merged, 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.
- Click **GO** and a list of possible primary person records will be displayed.

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Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About

Merge Persons Search Duplicates

Search for primary record:

Given Name

Family Name

Gender ☒ Male ☐ Female

Fuzzy ☐

GO Clear

Results

ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Actions
8369	Mark	Mushroom	M	02/06/1982	0		Open Select
8478	Mark	Mushroom	M	02/06/1982	0		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: The **Person ID** is displayed on the Edit Primary Details form on their Person record.

- 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.

- 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

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Advice, Referral and Case Management (ARC)

Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About

Merge Persons Search Duplicates

Primary Record (details kept)

[Refresh](#) [New Search](#) [Go to Client](#)

ID **8369**

Name Mark Mushroom

Gender male

Date of Birth 02/06/1982

Indigenous Status Aboriginal

Search for secondary record:

Given Name

Family Name

Gender ☒ Male ☐ Female

Fuzzy ☐

GO Clear

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.

- 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.

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Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About

Persons Merge Persons Search Duplicates

Days

Cases

Reports

Admin

Primary Record (details kept)

Refresh New Search Go to Client

ID 8369

Name Mark Mushroom

Gender male

Date of Birth 02/06/1982

Indigenous Status Aboriginal

Country of birth

Language at Home

Australian South No

Search for secondary record:

Given Name mark

Family Name mushroom

Gender ☒ Male ☐ Female

Fuzzy ☐

GO Clear

Results

ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Actions
8369	Mark	Mushroom	M	02/06/1982	0		Open Select
8478	Mark	Mushroom	M	02/06/1982	0		Open Select

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.

8. Carefully consider both records to ensure they relate to the same client.
Note : 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)

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Persons Merge Persons Search Duplicates

Days

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Admin

Primary Record (details kept) Secondary (Merge) Record

Refresh New Search Go to Client Refresh New Search Go to Client

ID 8369 ID 8478

Name Mark Mushroom Name Mark Mushroom

Gender male Gender male

Date of Birth 02/06/1982 Date of Birth 02/06/1982

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, FPP - UAT Service 12/11/2018 14:57:15 AEST Last update Worker Two, FPP - UAT Service 12/12/2018 17:28:58 AEST

Addresses Suburb Type End Date Primary

17 Trinity Lane MOUNT ISA Home 4825

Documents (notes, alerts, etc) associated with this record

No associated documents.

Alias / Duplicates

No associated alias or duplicates.

Validation Report

No conflicting Accommodation Periods

No conflicting Profiles / Cases

No conflicting Support Periods

No conflicting Relationships

No conflicting DSS Clients

No conflicting Group Memberships

Make Alias 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.

Person Merge

New Search Go to Merged Record

Merge completed successfully.
Check the merge record and if necessary manually update the following areas of the Details tab:

- A primary address is identified and the primary address is correct.
- Duplicate data is deleted or retired, in particular:
 - Relationships
 - Phone and other contacts
 - Key workers

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

15.4.3 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.

The screenshot shows the 'Merge' tab in the FPP - UAT Service interface. The primary record for Mark Mushroom (ID 8369) is displayed on the left. On the right, a 'Person Merge' summary indicates the merge was successful. Below the primary record, a table lists aliases, with the entry for ID 8478 (Mark Mushroom) having an 'Undo Merge' link highlighted in a red circle.


ID	Given Name	Family Name	Alias/Duplicate	Last Update
8478	Mark	Mushroom	Worker Two, FPP - UAT Service	12/11/2018 17:10

15.4.4 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.

15.5 Bulk Actions

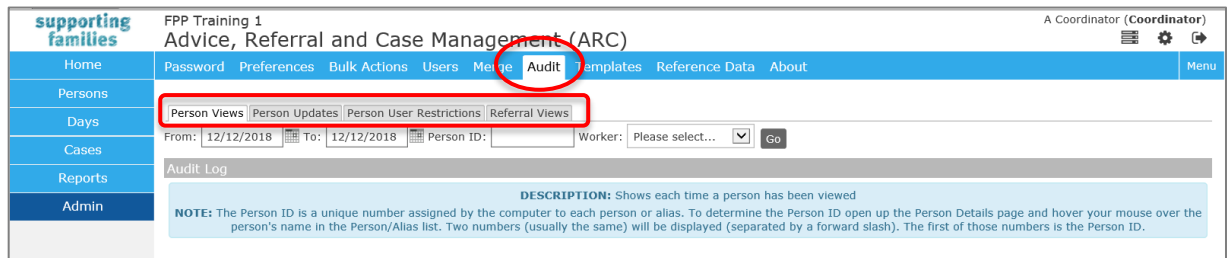
This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon  to access SRS Help or review the SRS product user guides at the following url: <http://srs-support.infoxchangeapps.net.au/user-guides>

15.6 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: <http://srs-support.infoxchangeapps.net.au/user-guides>

15.7 Audit

This is standard functionality from the Infoxchange SRS product.



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Home Password Preferences Bulk Actions Users Merge **Audit** Templates Reference Data About Menu

Persons **Person Views** Person Updates Person User Restrictions Referral Views

Days From: 12/12/2018 To: 12/12/2018 Person ID: Worker: Please select... Go

Cases

Reports

Admin

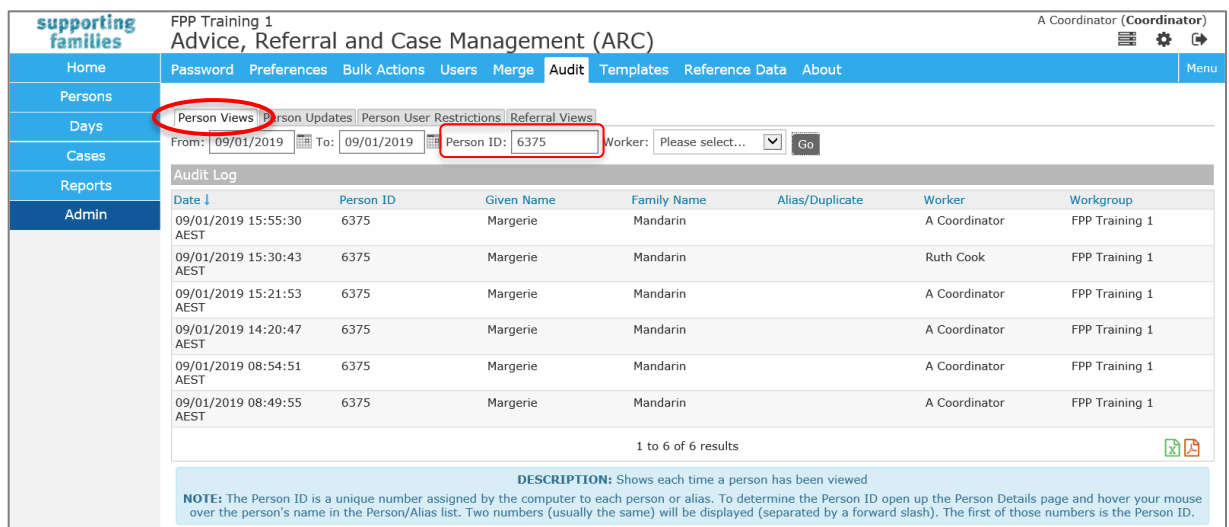
Audit Log

DESCRIPTION: Shows each time a person has been viewed

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 **Audit** tab on the **Admin** page enables you to :

1. 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.



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Home Password Preferences Bulk Actions Users Merge **Audit** Templates Reference Data About Menu

Persons **Person Views** Person Updates Person User Restrictions Referral Views

Days From: 09/01/2019 To: 09/01/2019 Person ID: 6375 Worker: Please select... Go

Cases

Reports

Admin

Audit Log

Date	Person ID	Given Name	Family Name	Alias/Duplicate	Worker	Workgroup
09/01/2019 15:55:30 AEST	6375	Margerie	Mandarin		A Coordinator	FPP Training 1
09/01/2019 15:30:43 AEST	6375	Margerie	Mandarin		Ruth Cook	FPP Training 1
09/01/2019 15:21:53 AEST	6375	Margerie	Mandarin		A Coordinator	FPP Training 1
09/01/2019 14:20:47 AEST	6375	Margerie	Mandarin		A Coordinator	FPP Training 1
09/01/2019 08:54:51 AEST	6375	Margerie	Mandarin		A Coordinator	FPP Training 1
09/01/2019 08:49:55 AEST	6375	Margerie	Mandarin		A Coordinator	FPP Training 1

1 to 6 of 6 results

DESCRIPTION: Shows each time a person has been viewed

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.

ARC User Manual for Family Participation Program

- 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**.

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Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About Menu

Persons

Days Person Views Person Updates Person User Restrictions Referral Views

Cases Start Date 09/01/2019 End Date 09/01/2019 Person ID Worker A Coordinator Go

Reports Search Results

Date	Person Id	Given Name	Family Name	Alias	Action	Worker Id	Last Update By
09/01/2019 14:21:42	6375	Margerie	Mandarin		UPDATE	102	A Coordinator, FPP Training 1
09/01/2019 08:52:47	6378	Brian	Banana		INSERT	102	A Coordinator, FPP Training 1
09/01/2019 08:52:16	6377	Beverley	Banana		INSERT	102	A Coordinator, FPP Training 1
09/01/2019 08:50:22	6376	Mark	Mandarin		INSERT	102	A Coordinator, FPP Training 1
09/01/2019 08:49:54	6375	Margerie	Mango		INSERT	102	A Coordinator, FPP Training 1

Admin

- See actions regarding Restricted Access to Person records.

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Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About Menu

Persons

Days Person Views Person Updates Person User Restrictions Referral Views

Cases Start Date 09/01/2019 End Date 09/01/2019 Person ID Worker A Coordinator Go

Reports Search Results

Auditlog Id	Workgroup	Cluster	Access	Worker	Restricted Worker	Restricted Client Id	Action	Date Time	Then Restriction Id
12	FPP Training 1	Training1f	prohibit	A Coordinator	F User	6376	added	09/01/2019 15:55:45	14
11	FPP Training 1	Training1f	prohibit	A Coordinator	F User	6375	added	09/01/2019 15:55:45	14

Admin

- 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 FPP Training 1 Advice, Referral and Case Management (ARC) A Coordinator (Coordinator)

Home Password Preferences Bulk Actions Users Merge Audit Templates Reference Data About Menu

Persons

Days Person Views Person Updates Person User Restrictions Referral Views

Cases From: 09/01/2019 To: 09/01/2019 Person ID: Worker: A Coordinator 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.

15.8 Reference Data

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

15.9 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.

16 ARC Support

16.1 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.

16.2 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.

16.3 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.

16.4 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 Family Participation Program service.

For any queries regarding matters of practice, please direct these to the Family Participation Program Team via ATSIfamilies@cyjma.qld.gov.au

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