Department of Child Safety, Youth and Women

Aboriginal and Torres Strait Islander Family Wellbeing services

Advice, Referrals and Case Management (ARC) system

Aboriginal and Torres Strait Islander Family Wellbeing (A&TSI FW)

User Manual

August 2019

supporting families changing futures

Queensland Government

This manual provides the user with information on how to access and use the Advice, Referrals and Case Management system for Aboriginal and Torres Strait Islander Family Wellbeing services.

For matters of practice, please refer to the information available at:

- https://www.csyw.qld.gov.au/child-family/child-family-reform/meeting-needs-requirements-aboriginal-torres-strait-islander-children-families-communities
- https://www.csyw.qld.gov.au/campaign/supporting-families/resources

DISCLAIMER

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

Table of Contents

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1 About ARC

Advice, Referrals and Case Management (ARC) is the system developed for Aboriginal and Torres Strait Islander Family Wellbeing services to manage information and advice, referrals, assessments, case management and reporting. ARC integrates tools and performance reporting to streamline the capture of reliable data for evaluating the outcomes achieved for vulnerable children and families.

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

To access ARC you will need:

- Internet connection
- Internet browser: Infoxchange supports the three most recent versions of Internet Explorer (IE9, IE10 and IE11), as well as the latest stable versions of Chrome and Firefox.

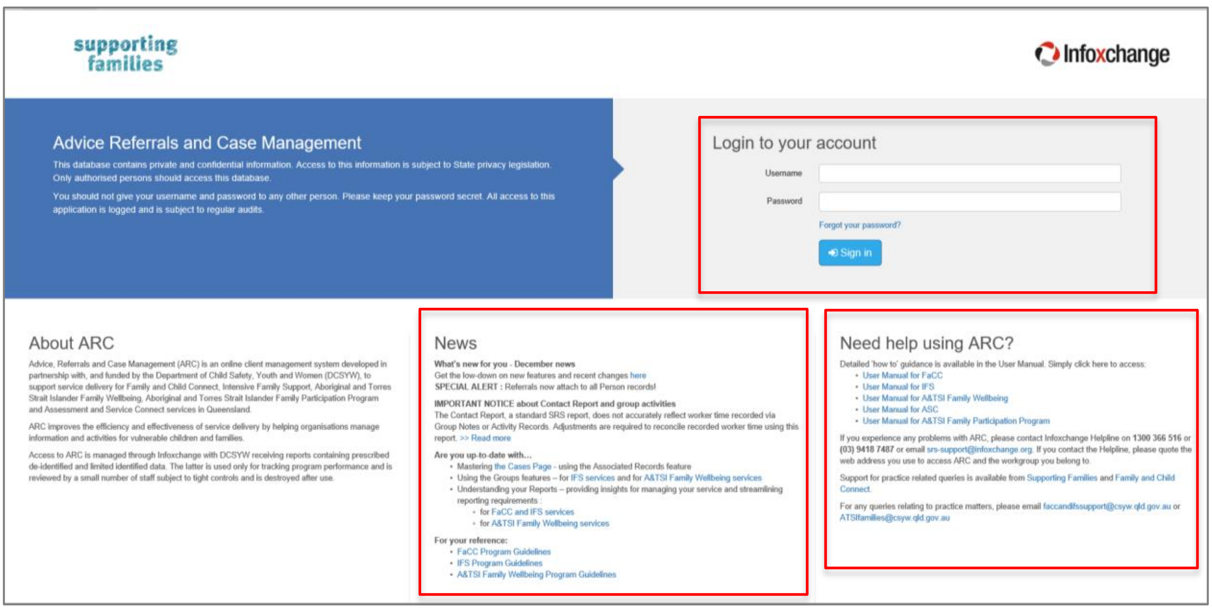
1.1 Logging into ARC

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 and fact sheets for making the most of particular features in supporting your work with families and managing your service.

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



1.2 Logging in for the first time

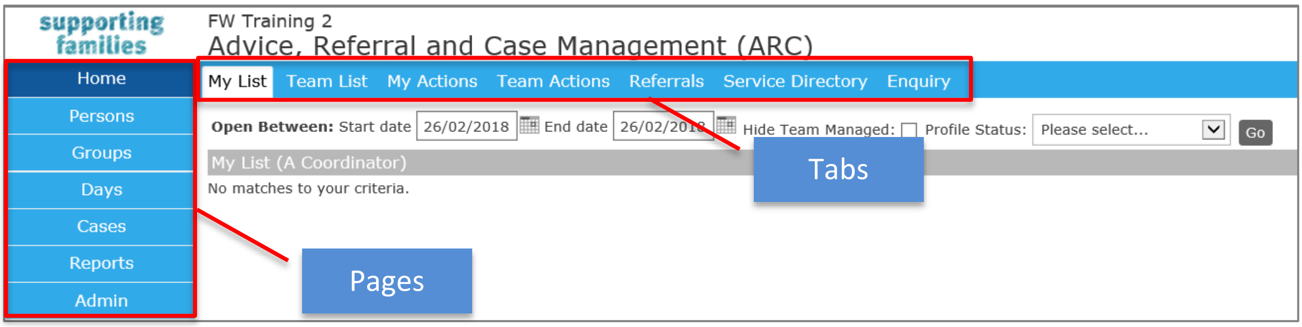
When you log in for the first time, you will be asked to change your password.

- Username must be unique within ARC. Recommend Firstname.Surname (e.g. John.Dough)
- Passwords needs to be a minimum of 8 characters, contain 1 numeric character and 1 non-alpha/numeric character

We recommend that you change your password to something easy to remember. 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 :

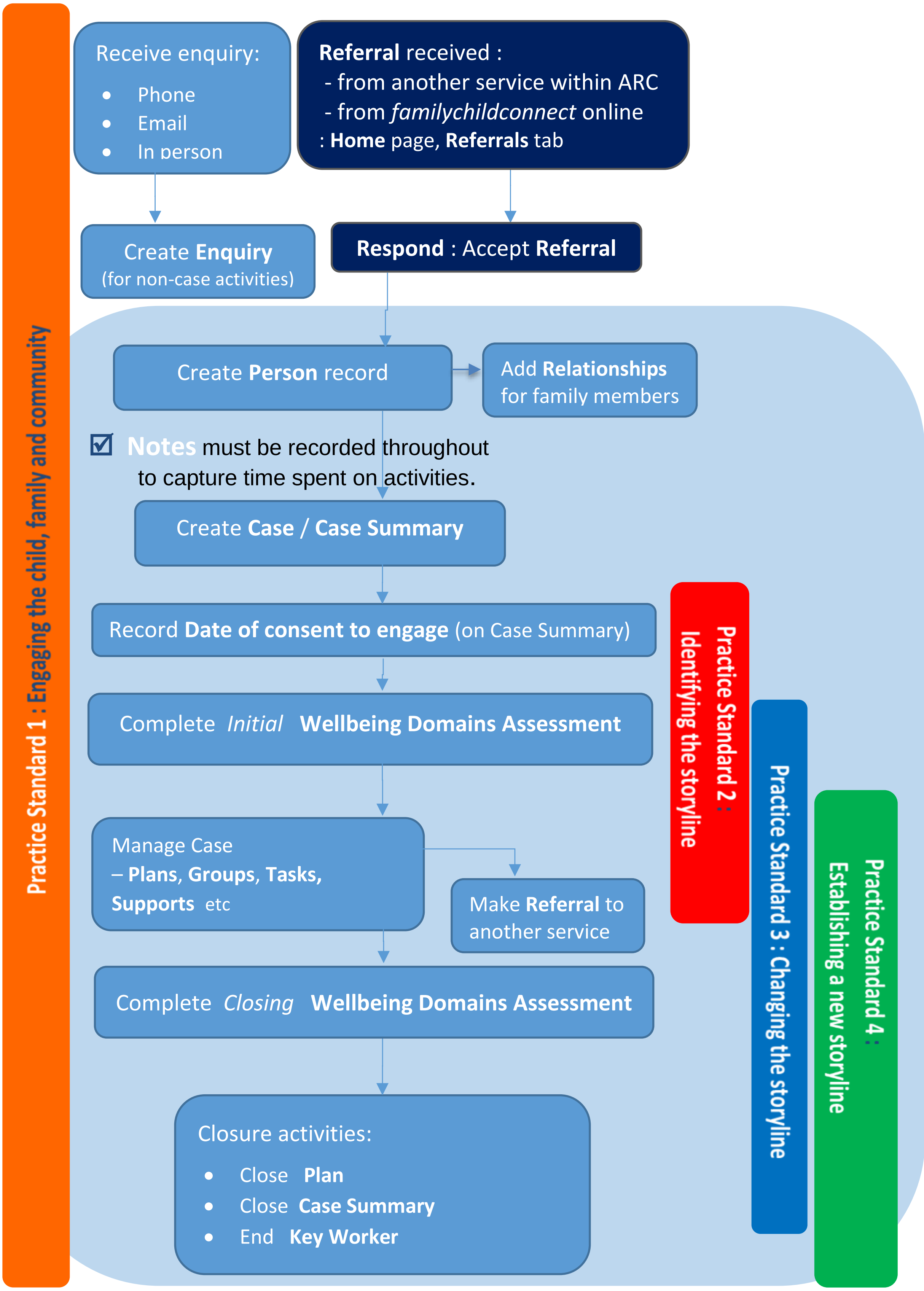
- Pages – 7 options on the left-hand side
- Tabs – appear across the top for each Page
- Workspace area – the central area.

Pages are grouped according to theme :

Home page:	Range of worker tools + **Enquiry** form
Persons page:	Search for clients and manage client records
Groups page :	Manage group work and activities
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 (start to finish) for using ARC in supporting vulnerable children and families, integrated with the QATSICPP Practice Standards.



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 the date that record ceased being correct or was completed (the 'end date'). This will close the record, but not delete it. It will be retained and able to be viewed from the **View Prior** section. Simply create a new record is to record the current / new activity.

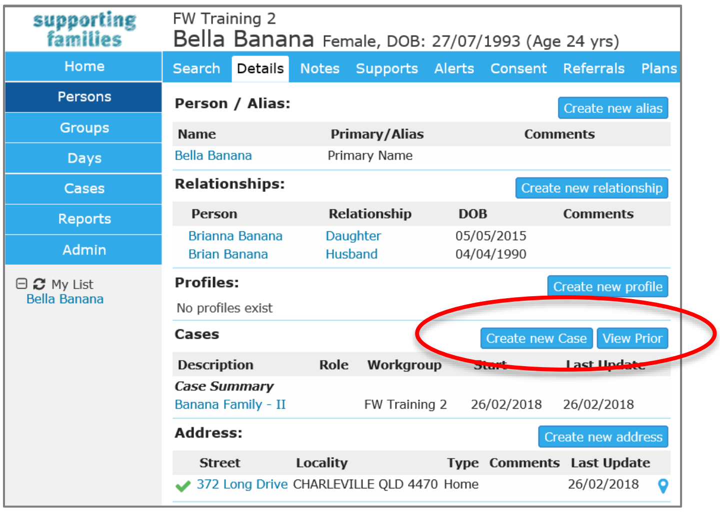
This **View Prior** feature occurs throughout ARC - the screenshots below provide an example of how it appears.

In Screenshot 1, you can see the **View Prior** button appears against *Cases / Case Summary* : this indicates that this Person has a current Case Summary and previous closed Case/s.

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

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

Screenshot 1



Screenshot 2

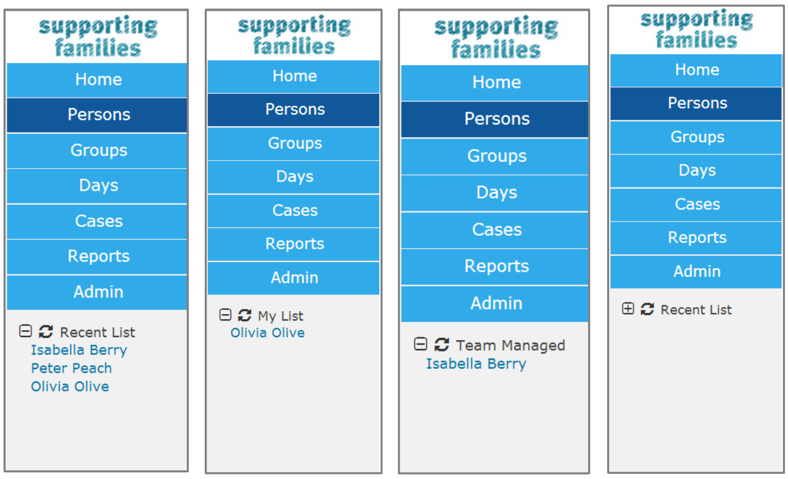
1.5 Toggle for access to Person records

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

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

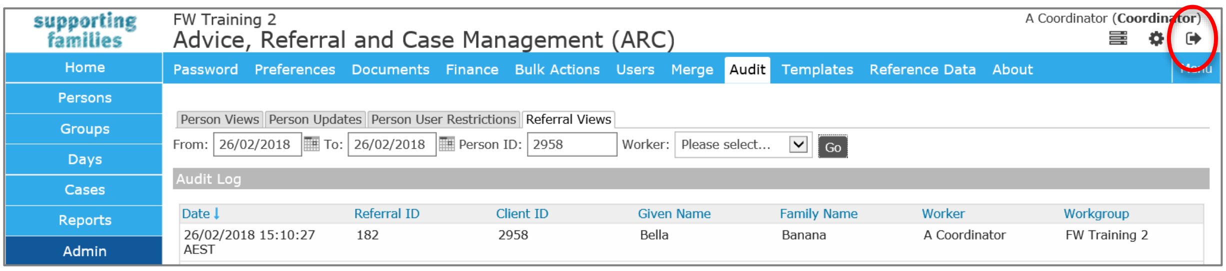
Simply …

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



1.6 Logging off

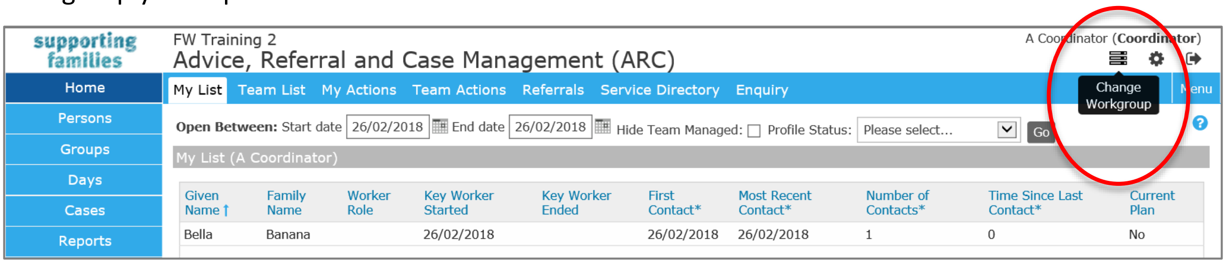
Log off via the log out icon on the top at the far right of the screen. Simply click to log out. Users should log out as soon as they have completed their work within ARC.



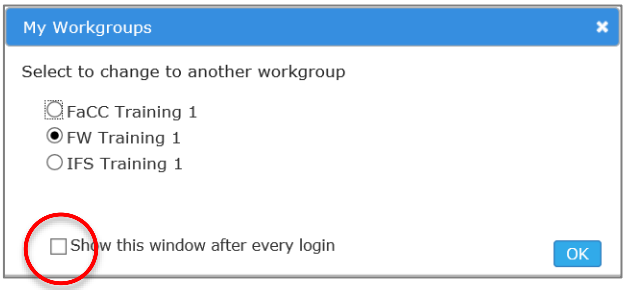
1.7 Access to more than one workgroup

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.



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:

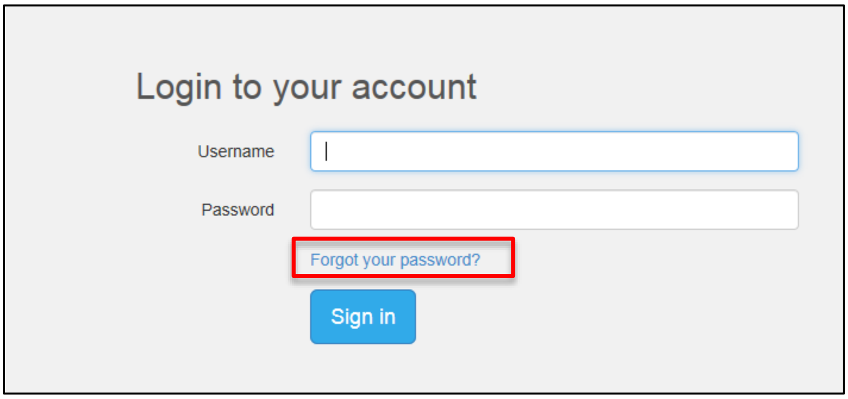
Select the required option and **Continue**.

1.9 Forgotten password

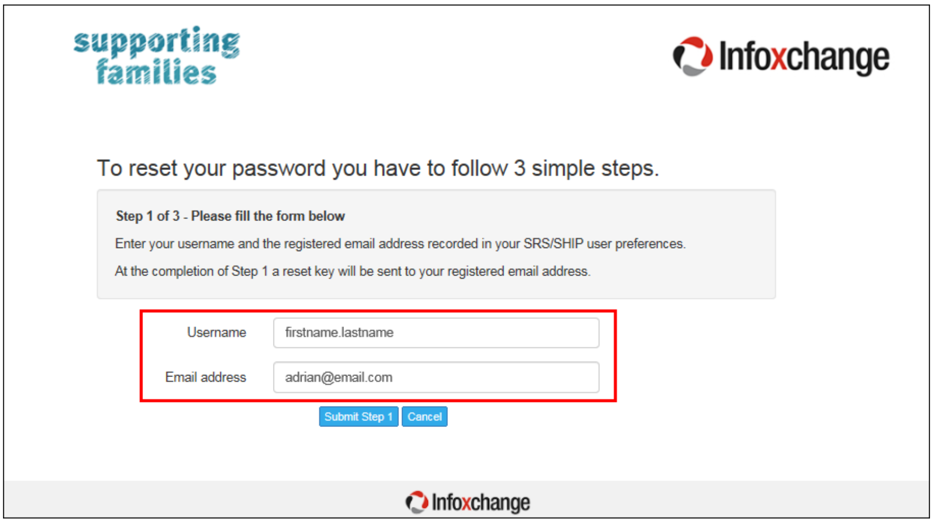
After you have logged in for the first time and have completed your Preferences (on the Admin page), the 'Forgot your password?' link on the landing page can be of great help.

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.

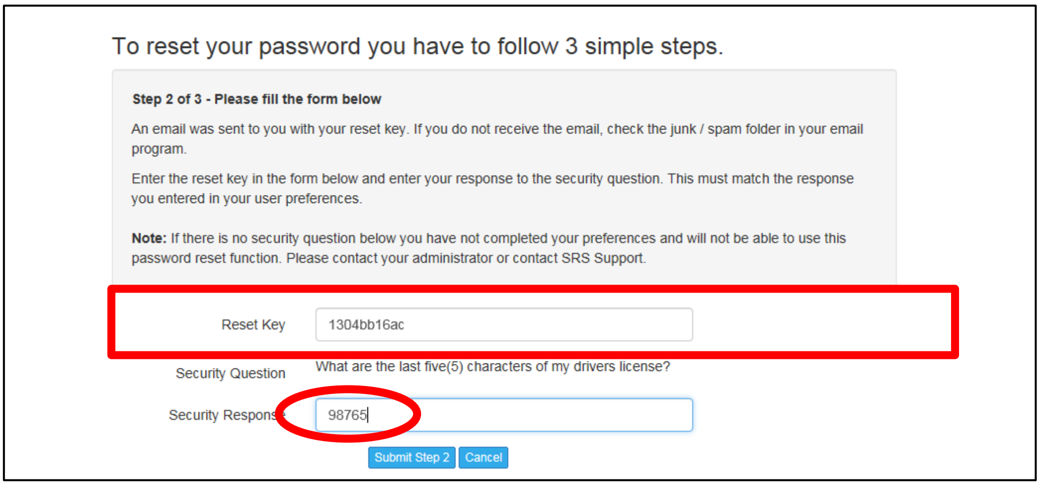


2. Enter your username and the email address registered with your user profile and select **Submit Step 1**



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

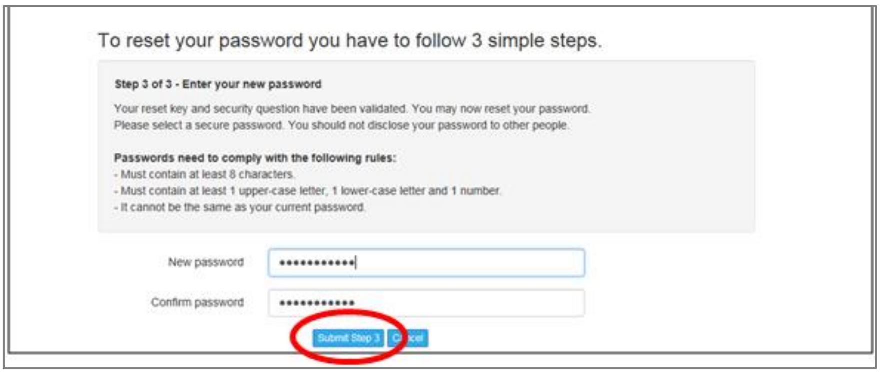


4. Enter your **new** username and password

<u>**Note**</u>: 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**



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

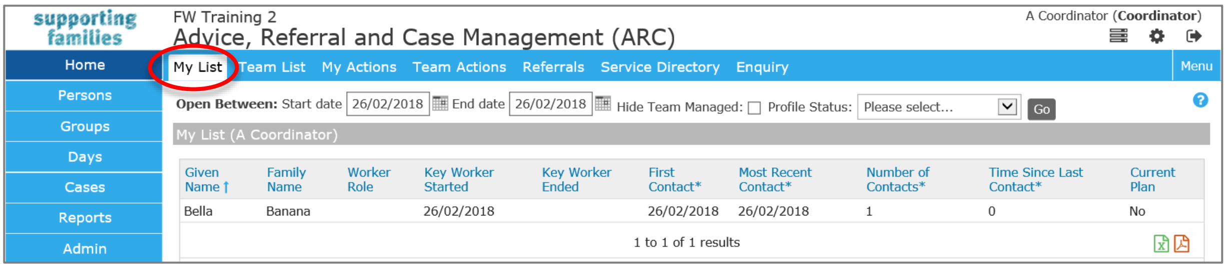
2 Home Page

2.1 My List

The **My List** tab is used to view the list of Persons you have been allocated as a Key Worker (on the **Persons** page, **Details** tab).

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 :



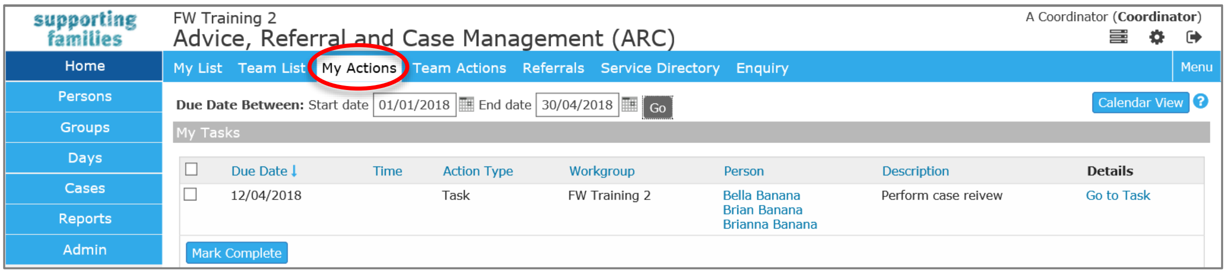
The following options can be used to customise your view:

- Click the calendar icon and alter the Start date and End date to filter data by date.
- 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 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.



The following options can be used to customise your view:

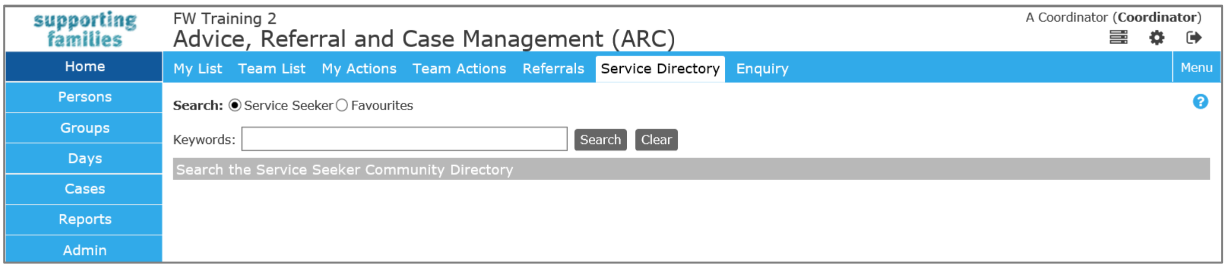
- By default, the system displays actions that are due in the next four weeks or were due in the past six weeks that are yet to be completed or closed. To alter the period you are viewing, enter dates into the Start date and/or End date fields, or use the calendar icon to specify a period. Click **Go**.
- 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** takes you to the individual action.

2.3 Service Directory

The **Service Directory** tab provides access to search the SRS Service Seeker Database, a product maintained by Infoxchange, independent to ARC. If you wish to have your organisation listed in the SRS Service Seeker Database**,** go to the following url http://www.serviceseeker.com.au

If you require help using this feature click the Help icon or contact the Infoxchange Help Desk.

1. From the **Home** page select the **Service Directory** tab



2. Enter Keywords to be used in the search such as ‘youth’ or ‘aged care’. You can enter multiple Keywords to be used in your search. For example, if you would like to locate youth services that provide accommodation in a particular suburb, enter ‘youth accommodation’ and the name or postcode of the suburb. You can also separate search terms with commas such as ‘youth, accommodation’.

3. Click **Search** or press **Enter**

Your search results from Service Seeker will be displayed. Each entry includes an extract of the service description from Service Seeker. To view the full Service Seeker details of the agency within a new browser tab, click the 'More Information' link. This link will also display a map showing the service location.

4. You can click on the star to add a service to ‘Favourites’. Once you have done this the star becomes yellow.

5. Once you have flagged a favourite you can also add comments to the record. Do this by clicking the pencil icon. After you save the comment it will be available to all members of the workgroup.

Additional Notes:

- To clear the search parameters, click **Clear**.
- If your search returns more than 20 results, you will need to refine your search criteria.

Search Hints:

If you wish to search for an exact phrase, include the phrase in double inverted commas eg. *"homeless youth".* Normally the search will look for any of the key words you use in your search parameters. e.g. Searching for *homeless youth* you will return matches that have either 'homeless' or 'youth' in their description.

If you want your search results to require particular words, add a '+' symbol to the word. e.g. *+homeless +youth* will return only those services that have 'homeless' and 'youth' in their description.

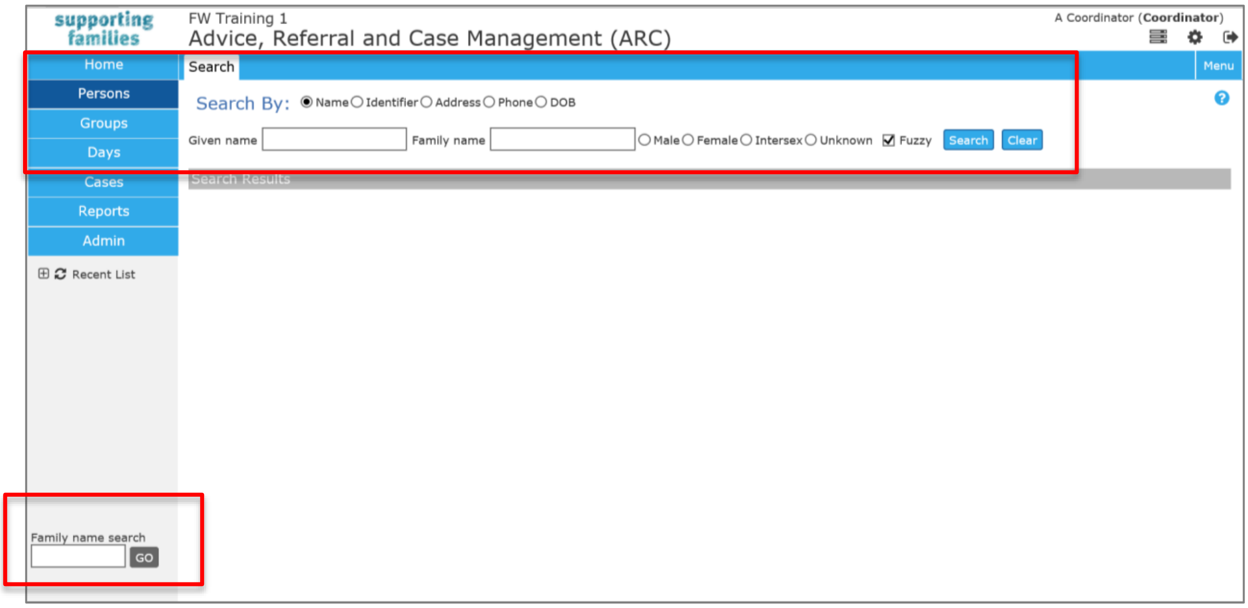
3 Person Details

3.1 Searching for a Person

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

There are 2 ways you can search for a Person :

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



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

Fuzzy searching allows you to search for clients with names that are a close match, or sound similar, to the one you typed. It is highly recommended to always do Fuzzy searching 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. ARC recognises the ***** and **%** characters as wild cards.

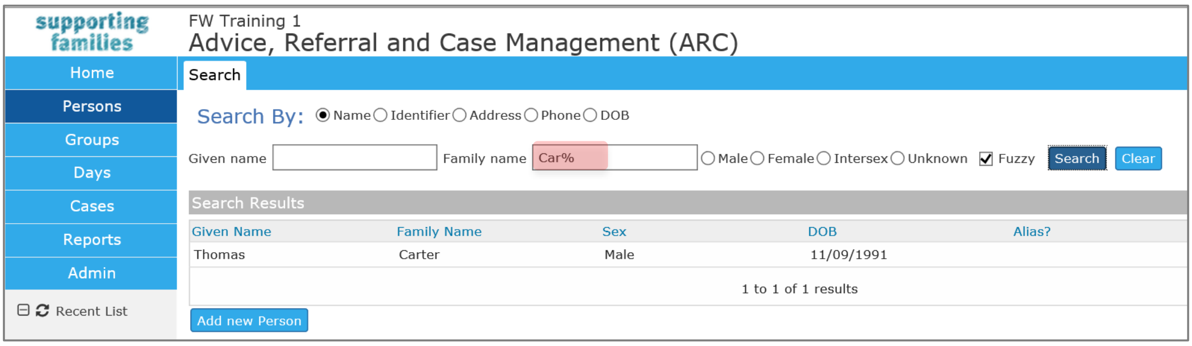
A wildcard is a character that can be used as a substitute for characters in a search, which greatly increases efficiency and is much stronger than the fuzzy search. For example, %son returns a list of all Person records where the last two letters in his or her name is 'son'.

Some example wildcard searches include:

- %son will search for names ending in "son"
- Bri* will search for names starting with "Bri"
- %tin% will search for names with "tin" somewhere in the name.

3.2 Add a Person

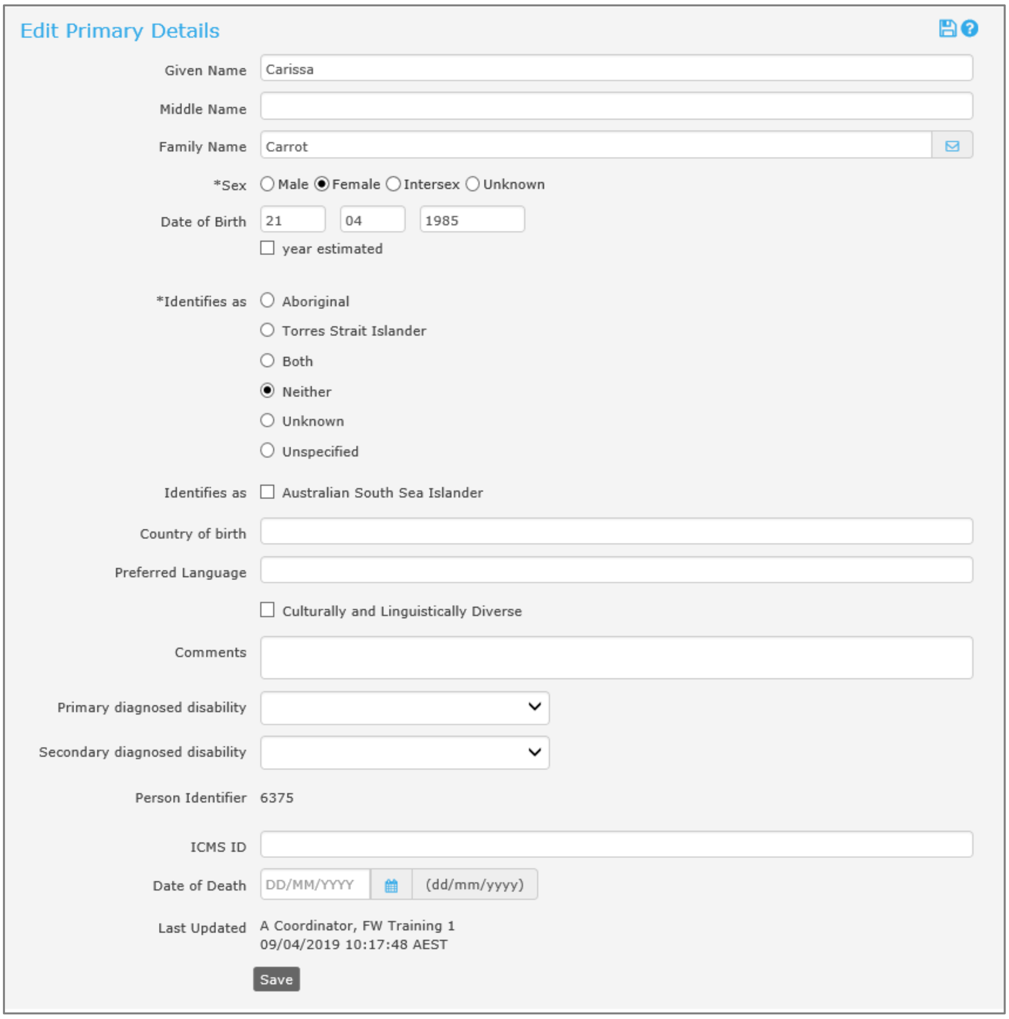
1. On the **Persons** page**, Search** tab**,** enter the criteria for the person you are searching for. Click **Search**.



If there is no record 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.



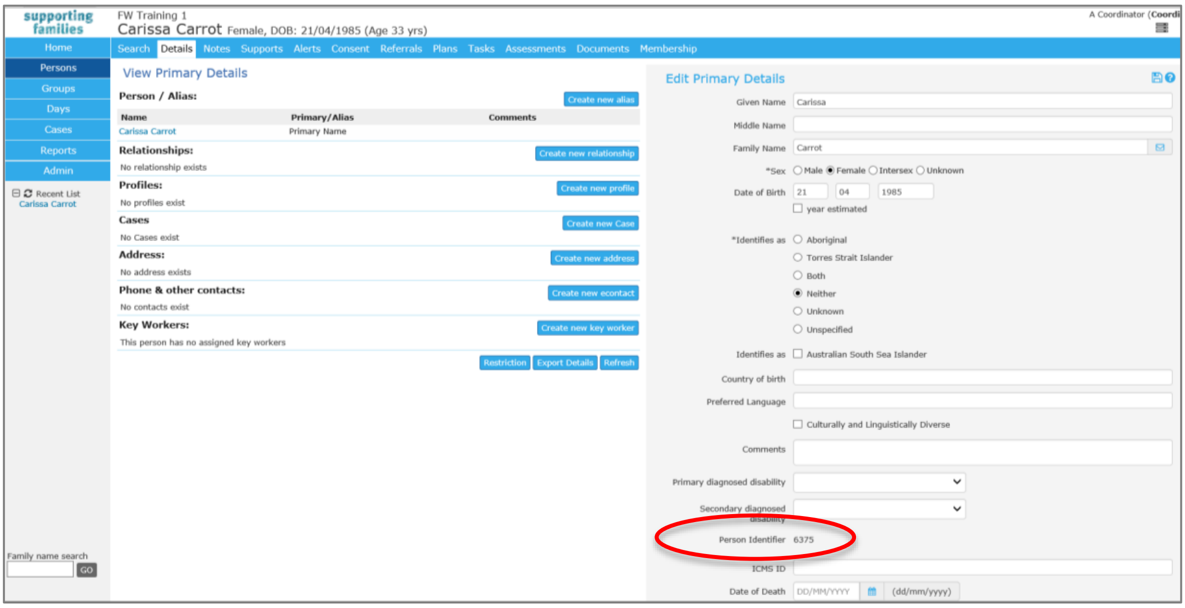
For recording *Indigenous status*,

Unknown – the person does not know their Indigenous status

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

4. Select the **Save** button or select the icon in the top right of the form.

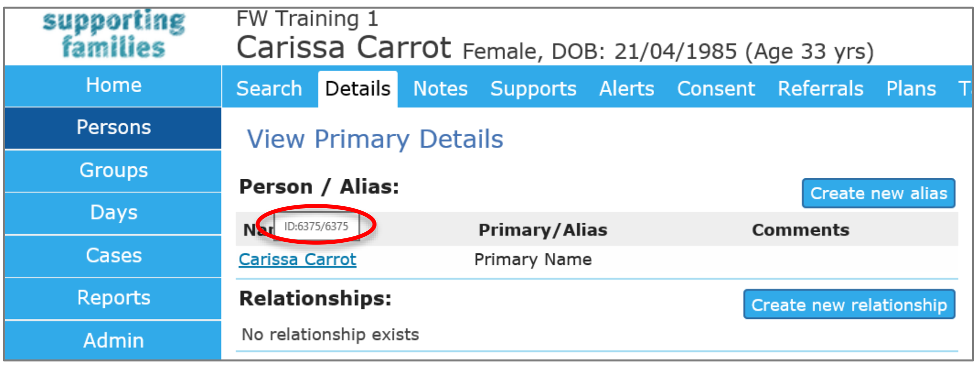
5. The **Person** record is created – the **Details** tab is the default view.



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

Person Identifier / Person ID :

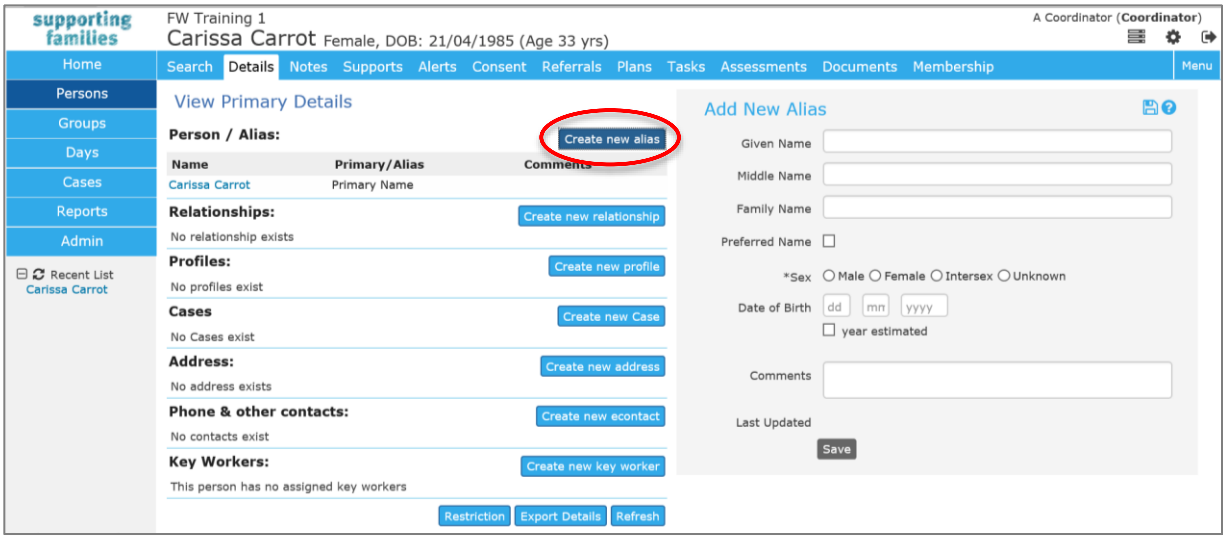
A unique system-generated **Person Identifier** number is assigned to each Person record. It can be found by hovering over the Person name on the **Details** tab, as shown below, or from the Edit Primary Details form, as shown above.



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

3.3 Create Alias

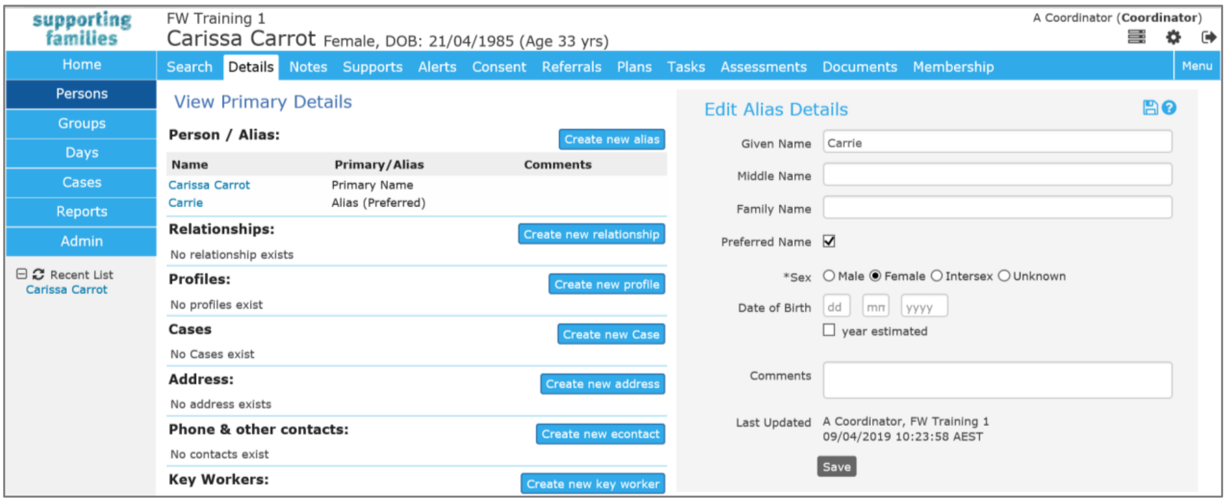
1. From the **Person** page, **Details** tab, select **Create new alias**.



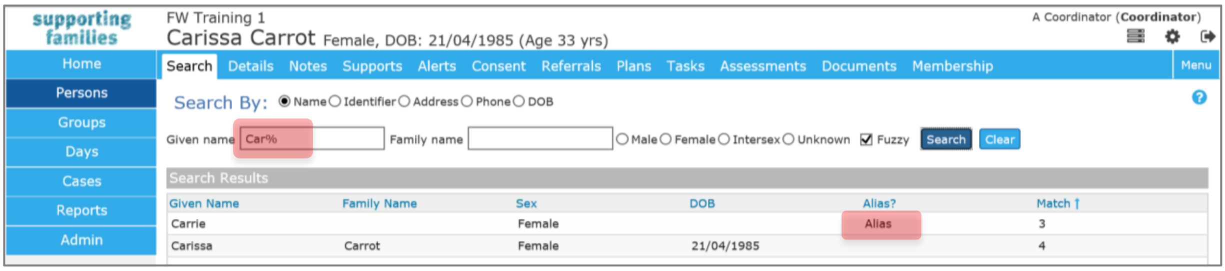
2. Record relevant details in the **Add New Alias** form. Select **Save**.

3. To modify the Alias, click on the Alias name and the **Edit Alias Details** form will display on the right hand side.

4. Update the details and select **Save.**

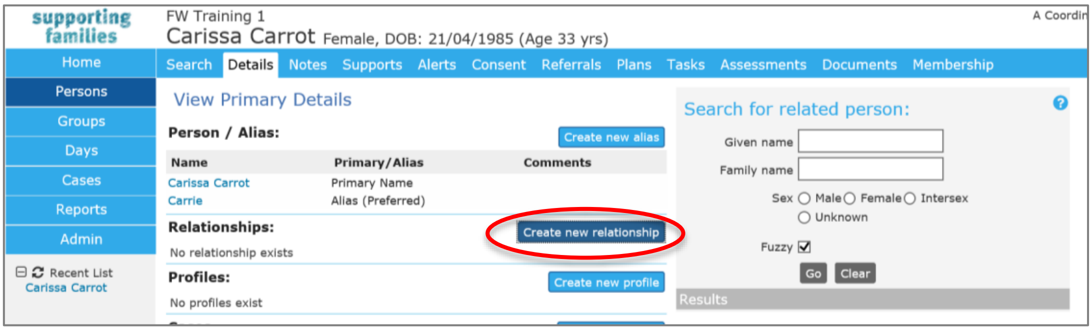


A Search for the Person will display as below:

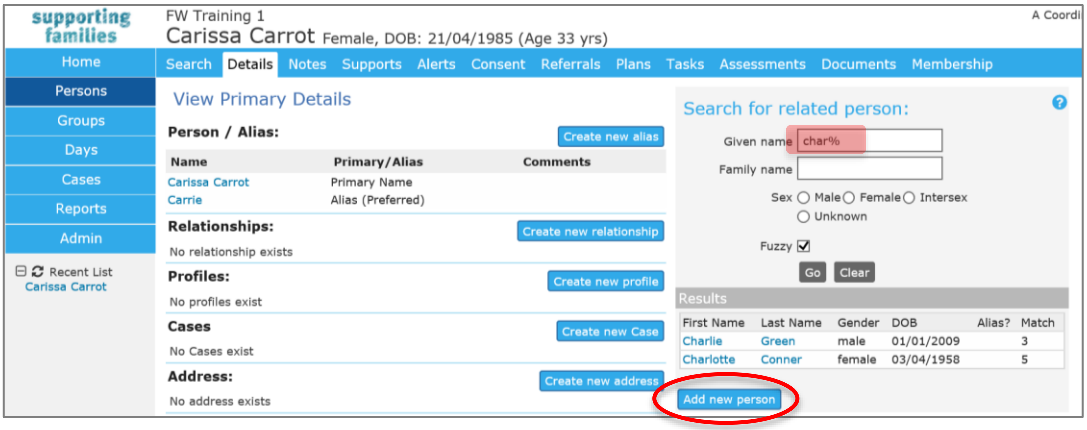


3.4 Create Relationships

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



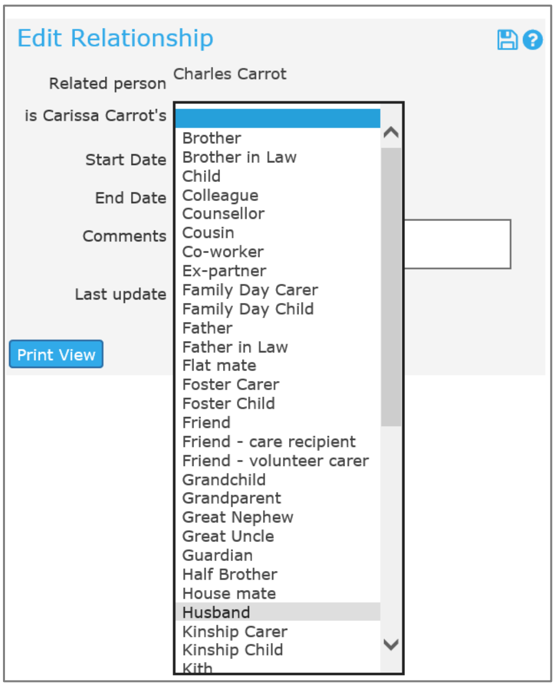
2. Search for the related person – enter name using wildcard search, as example below for *Charles*. Click Go.
   If no records for the Person you are looking for are found, select **Add new person.**



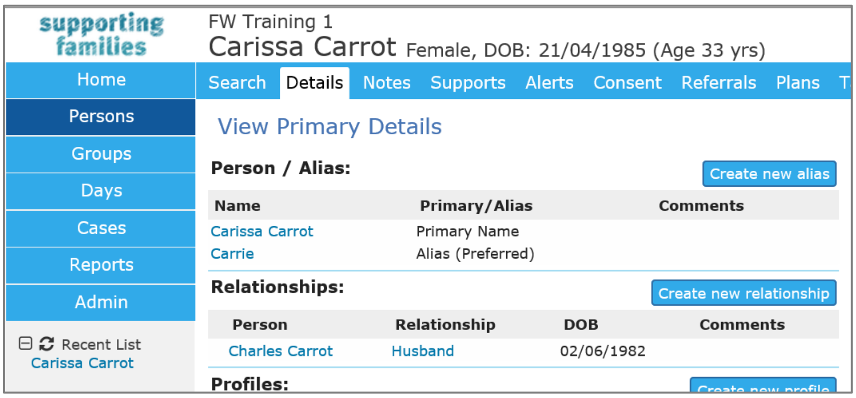
3. Complete record as outlined in the preceding section [Add a Person](#). Click **Save**.
4. The **Edit Relationship** form will display.

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

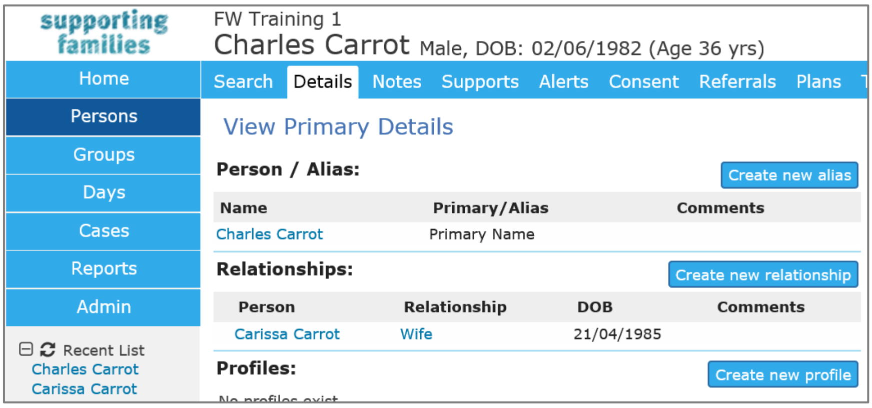
   Note: the start date for a relationship auto-populates to today's date.



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



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

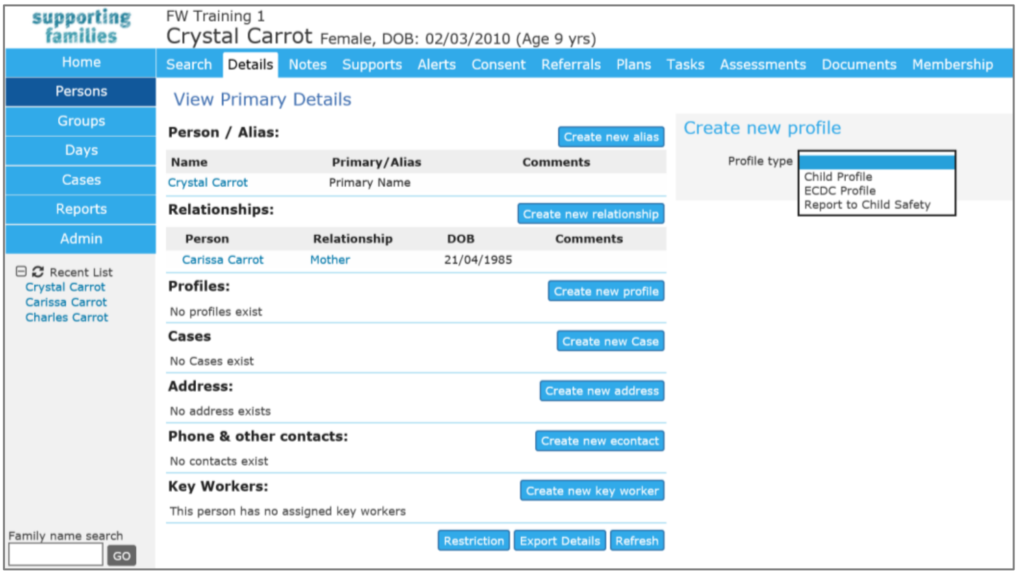


If you click the relationship value, the **Edit Relationship** screen opens if you need to edit / update.

3.5 Create Profile

There are 3 Profile records available in ARC :

- Child Profile : this is available to be used as determined by your service. This record is not linked to any specific departmental reporting. Generic reports (and lists) are available for Profiles.
- ECDC Profile : this is specifically for the Early Childhood Development Coordinator within your service. This is linked to specific reporting for this contract – please refer to Chapter 12.
- Report to Child Safety : this is available to be used as determined by your service. This record is not linked to any specific departmental reporting. Generic reports (and lists) are available for Profiles.

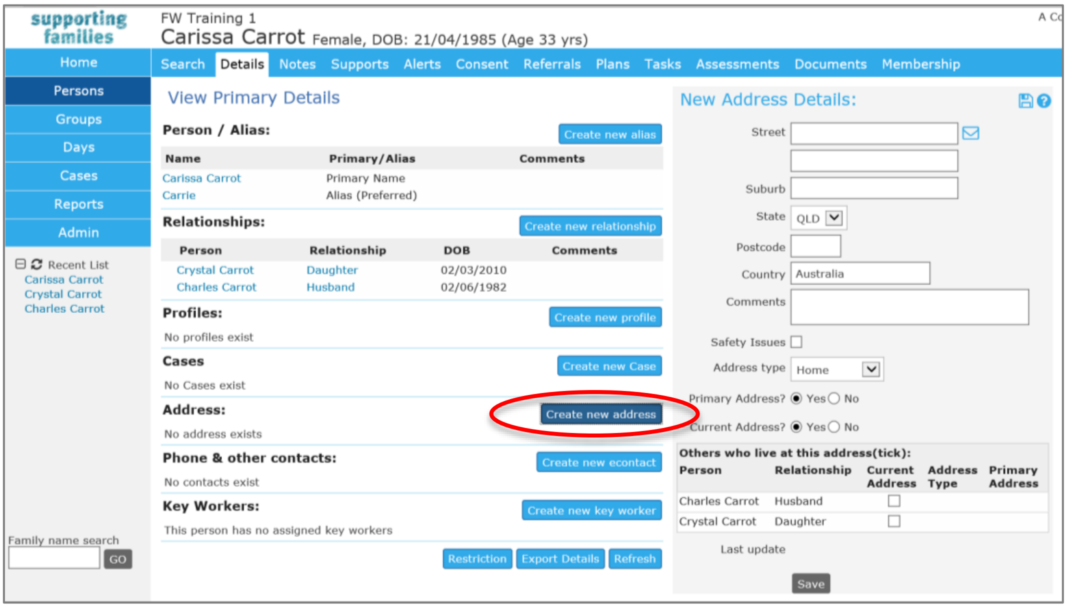


3.6 Record Address

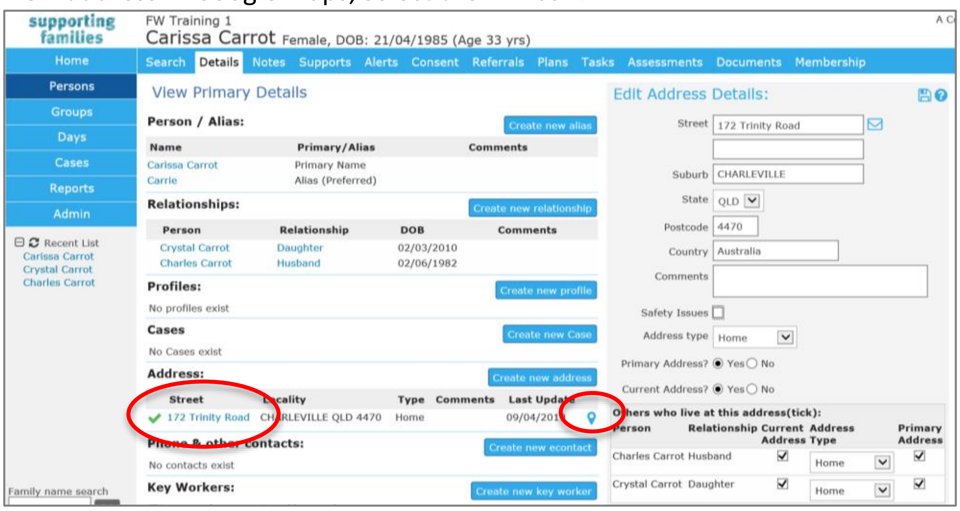
Multiple current addresses (such as home, postal or respite) can be recorded for a Person. However, at any one time, a Person can only have one primary address.

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.

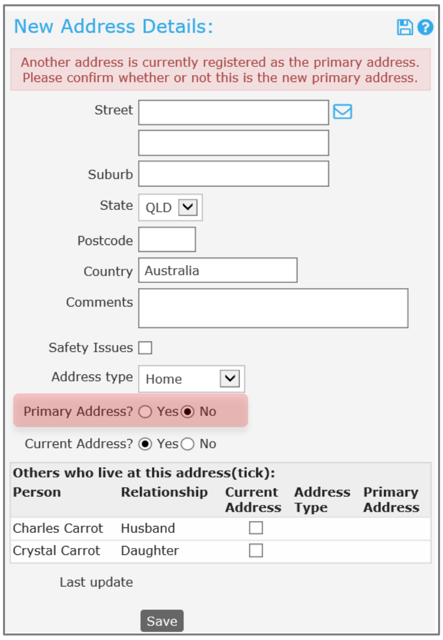


2. Record the address, including **Street**, **Suburb** - **Postcode** will auto-populate based on the Suburb selected.
3. Select the **Address type** from the drop-down options.
4. Update the **Primary** and **Current** address status (Yes/No) as relevant for that Address type.
5. The address can be 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.
7. 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.



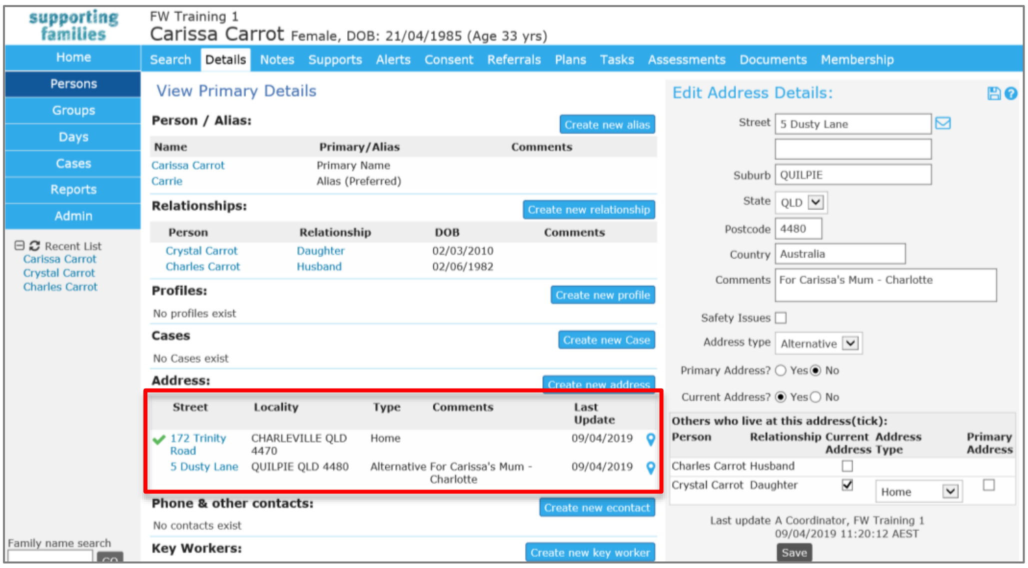
Additional Notes:

- When you start typing the Suburb, a list of possible options will appear.
- When you select the **Suburb**, 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.



Simply record the required information, noting that this will not be the Primary Address for that Person.
Use the **Comments** box to record the relevance of this address. Click **Save**.

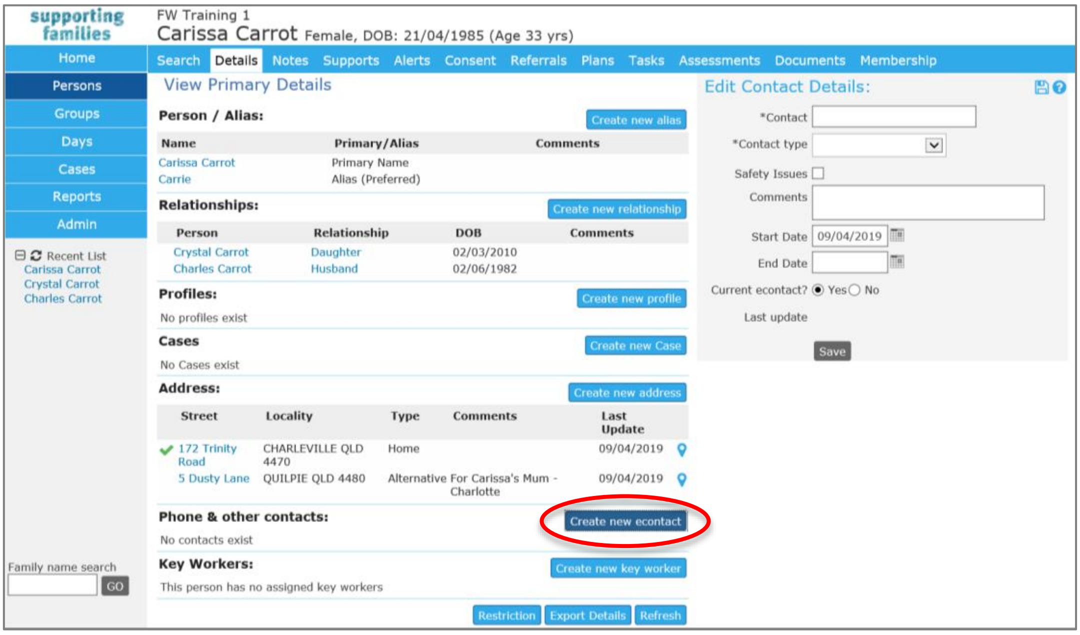
The **Details** tab will display as follows :



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.



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

Contact	Type	Comments	Last Update
⚠ 5488 7890	Phone (Hm)	Don't leave messages	09/04/2019
0414 566 788	Mobile		09/04/2019
⚠ 5466 7891	Emergency Contact	For Charlotte - Carissa's mum	09/04/2019
carissa@carrotfarm.com.au	Email		09/04/2019

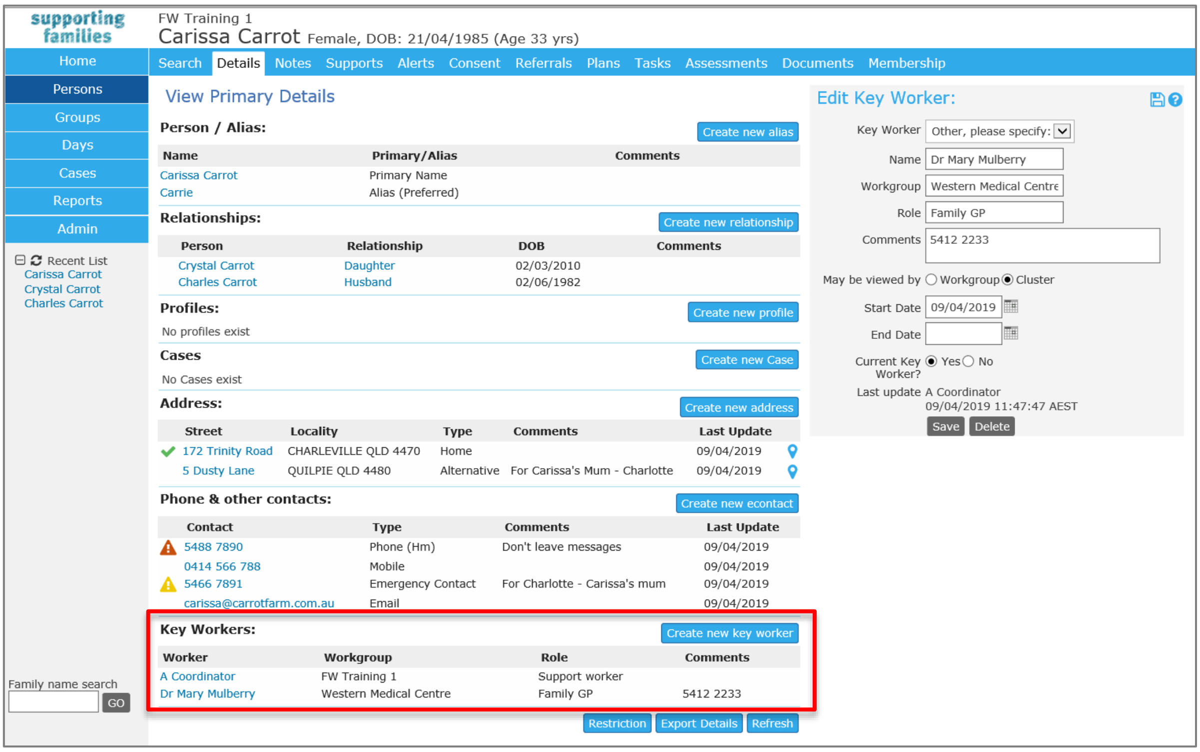
Additional Notes:

- 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) 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.
   To record a key worker external to your service, select '*Other, please specify:*' from the bottom of the **Key Worker** drop down list. Then enter their name, role and organization details in the available fields.
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**.



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.

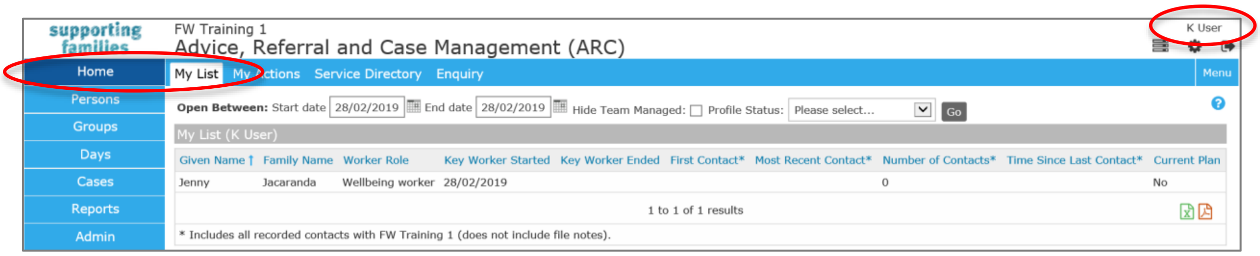
Understanding **Key Worker** and **Case Worker**

In the majority of cases, the **Key Worker** (Person, Details tab) is going to be the same worker as recorded as **Case Worker** on the Case Summary.

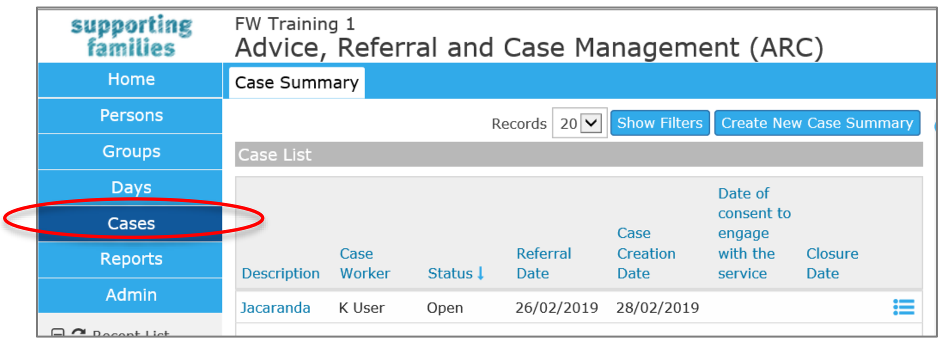
Let's consider the following table:

	Recorded on….	Displays on….
Key Worker	**Person** record, **Details** tab	**Home** page, **My List** tab
Case Worker	**Case Summary**	**Cases** page

By example…
the **Key Worker** recorded on the **Details** tab for the Person works by displaying that Person record on the worker's **My List** tab (on the Home page)



The **Case worker** recorded on the Case Summary (refer Chapter 4) displays on the **Cases** page



4 Cases / Case Summary

The **Case Summary** represents the case for *the family*.

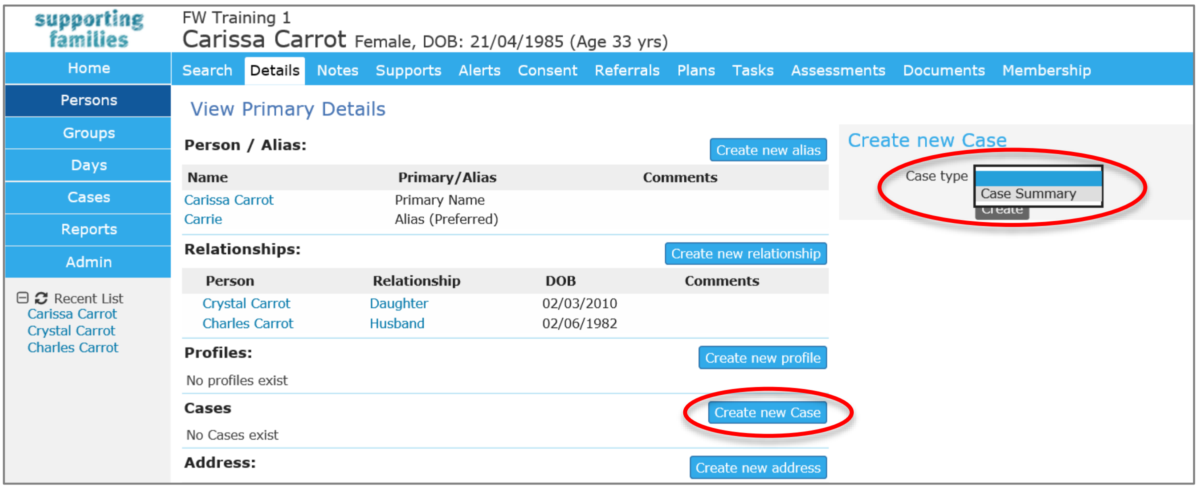
A Person can only be associated with one active Case Summary at any one time.

Case Summaries can be created in two ways:

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

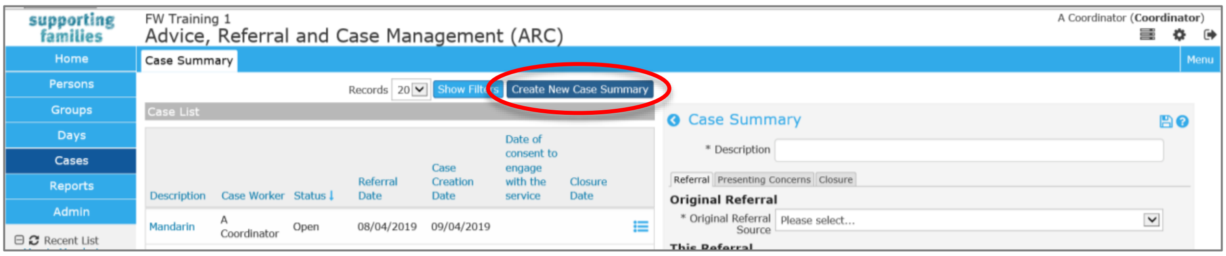
4.1 Create a Case / Case Summary from Persons page

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



4.2 Create Case / Case Summary from the Cases page

1. From the **Cases** page, select the **Create New Case Summary** button.
   The **Case Summary** form will open in the right-hand side of your screen.
   Complete as outlined in Section 5.3 below – particularly Step 11, add Persons.

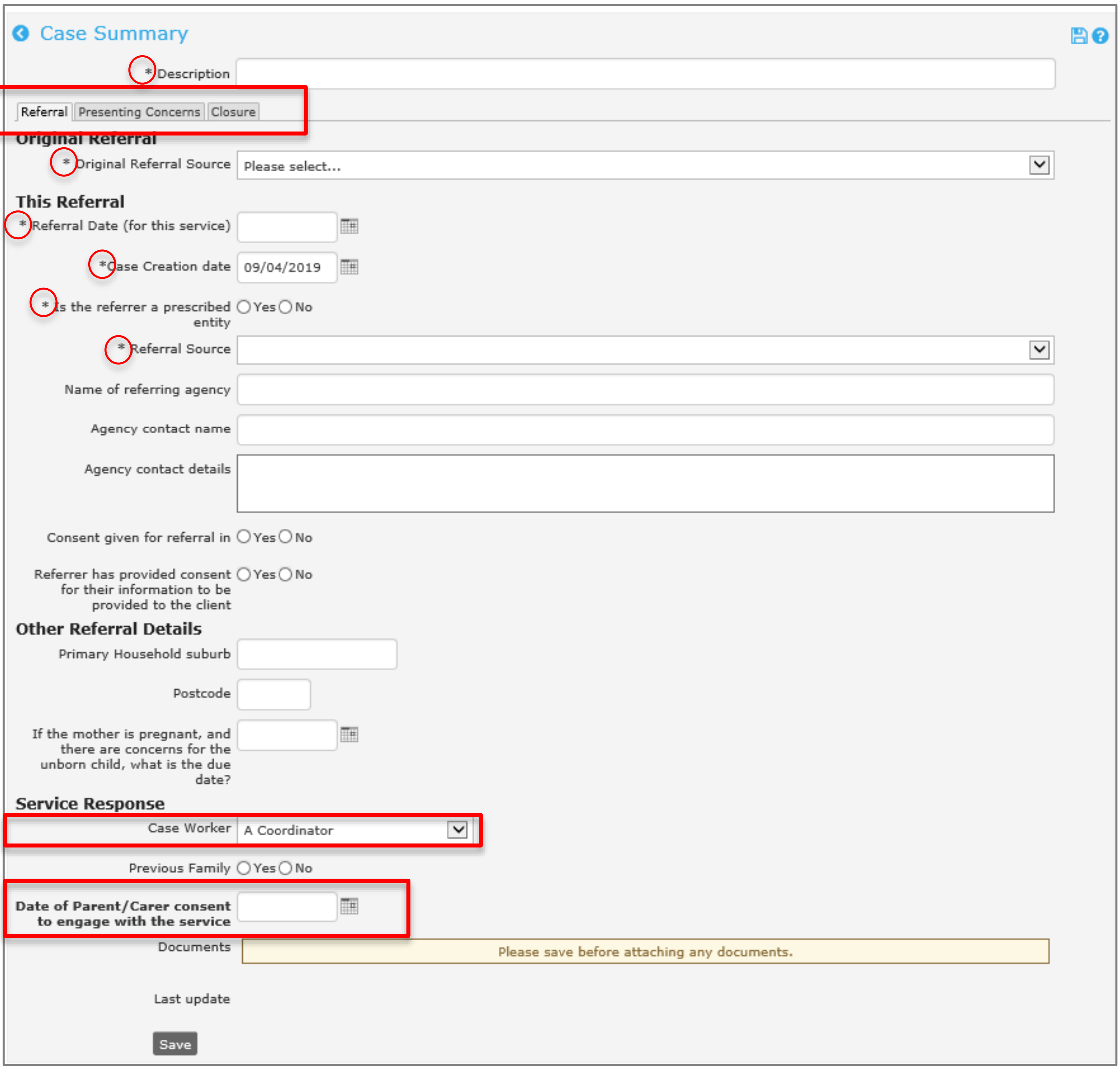


4.3 Complete Case Summary details

The **Case Summary** form comprises **3** sub-tabs :

- ***Referral*** : captures mandatory data about the referral
- ***Presenting Concerns*** : as reported by the referrer
- ***Closure*** : captures mandatory data upon completion of your work with the family.

The mandatory fields are marked with an asterisk * .



The first 6 data fields must be completed in order to save the record.

1. In the **Description** field (at the very top of the form), record the reference/ name for the family in accordance with the procedures for your service.

The ***Referral*** sub-tab captures key data in **4** sections :

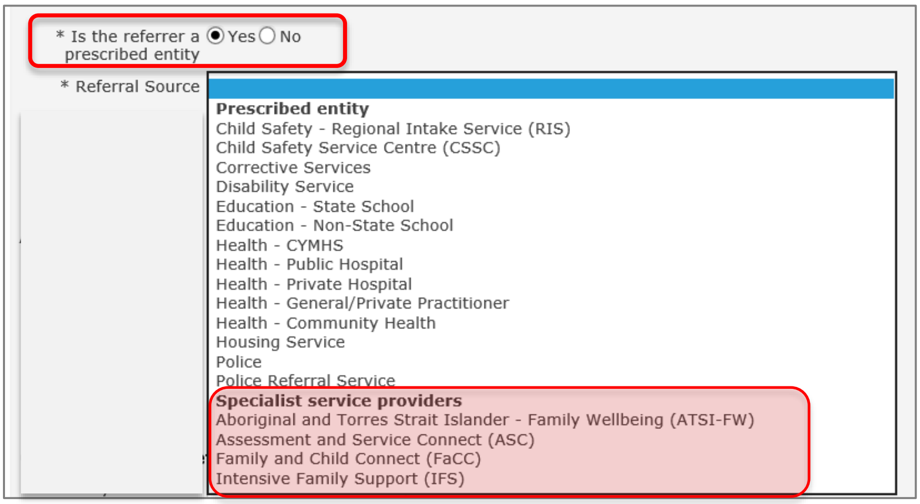
- Original Referral
- This Referral
- Other Referral Details
- Service Response.

2. Record the **Original Referral Source** * details.
The **Original Referral Source** is the first place the family was referred from (e.g. Police may refer a family to a Child Safety Regional Intake Service, who then refer to an IFS. The *Original Referral Source* is Police).

3. In **This Referral** section :
Enter **Case Creation Date*** – the date the service 'opened' the case for this family. This defaults to today's date (can be backdated).

4. Enter **Referral Date (for this service)** * – the date this referral was *received* by your service.

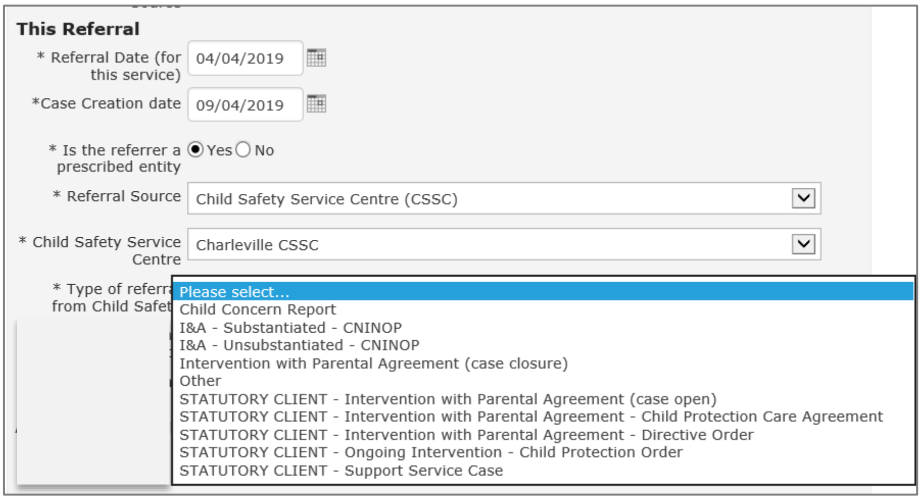
5. Complete **Is the referrer a prescribed entity** by indicating Yes or No.



The legislative changes effected in late 2018 recognised funded secondary services as *prescribed entities*, specifically **Specialist service providers**.

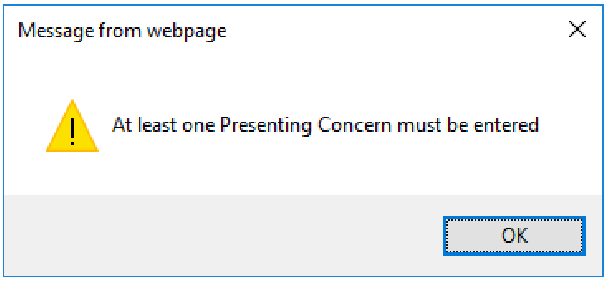
6. Select the **Referral Source*** from the drop-down list – where <u>you</u> have received this referral from.

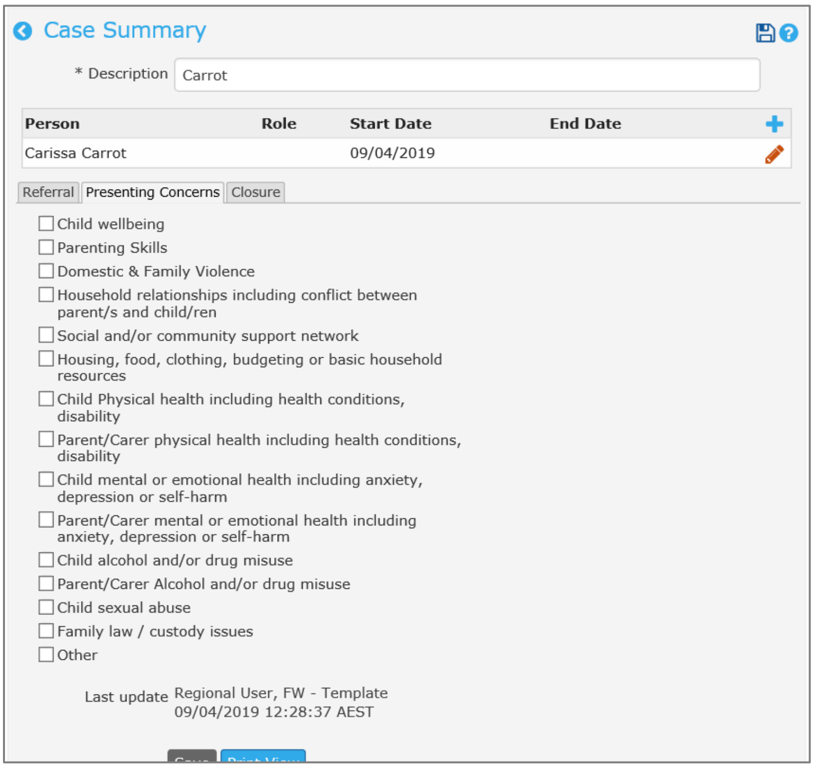
<u>Note</u>: If the **Referral Source*** is either **Child Safety – Regional Intake Service(RIS)** or **Child Safety Service Centre (CSSC),** then extra mandatory fields will display to record the specific Child Safety office and the **Type of referral** :



7. Select **Save**.

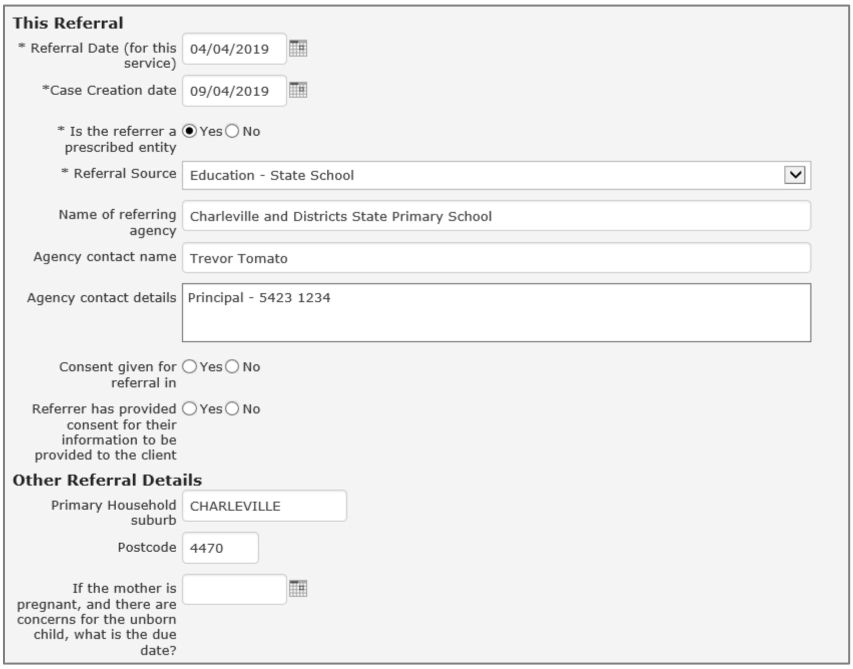
8. You will be prompted to complete the **Presenting Concerns** sub-tab.



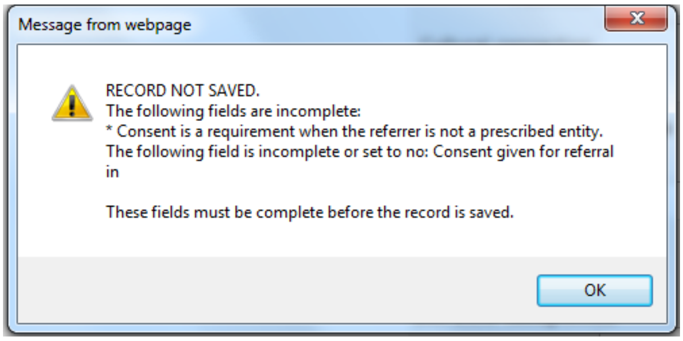


Complete the relevant check boxes and **Save**.

9. Return to the Referrals sub-tab and complete remaining fields for the **This Referral** and **Other Referral Details** sections.

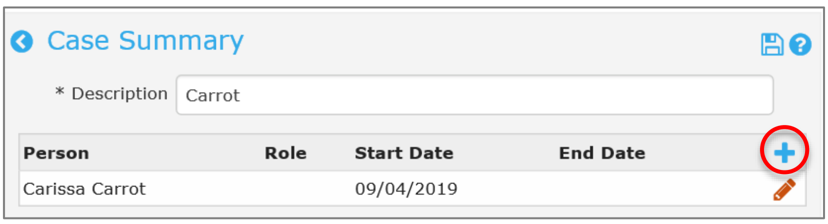


<u>Note :</u> If the referrer is <u>not</u> a prescribed entity, and **Consent given for referral in** is <u>not</u> completed or No, the following message will appear :



10. Select **Save**.

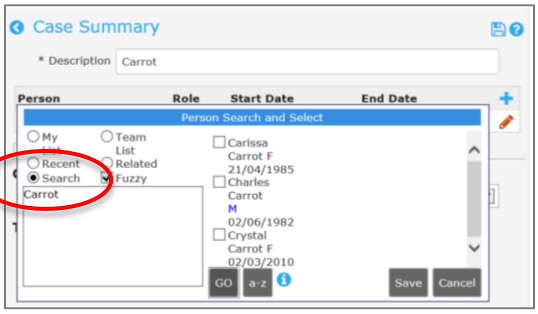
11. **<u>THIS IS VERY IMPORTANT</u>** : Attach the relevant **Persons** to the **Case Summary** by selecting the icon at the top of the form.

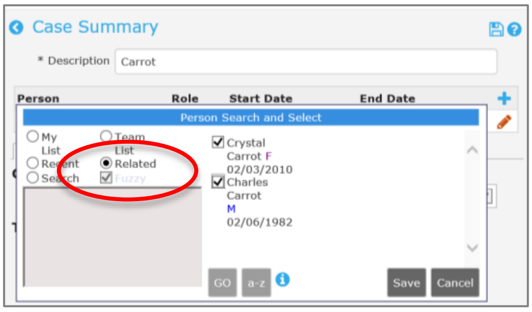


12. This will open the **Person Search and Select** pop up box.
Select the **Search** radio button, enter the client name in the white box, click **Go**.

Helpful Note: Use the **Related** button to easily identify relevant family members participating in the Case.

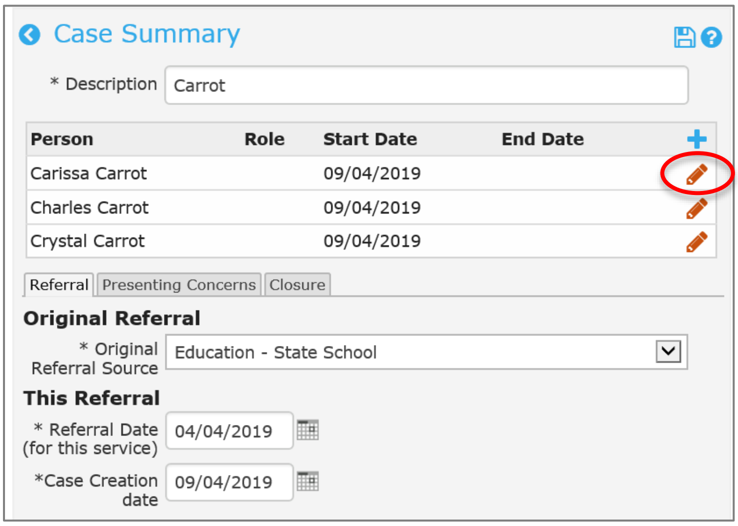
Attach to the Case Summary (by ticking their checkbox) and click **Save**.





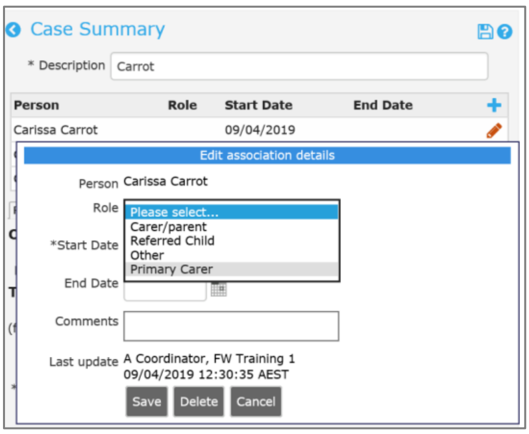
Click **Save.**

This populates the **Person** section on the **Case Summary**.



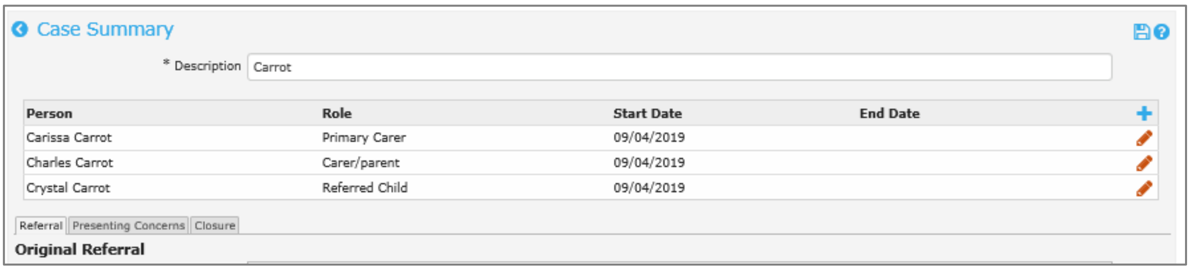
Click on the red crayon to assign a **Role** for each Person.

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

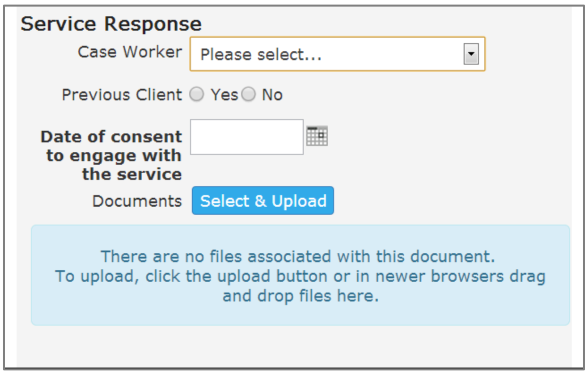


The **Start Date** reflected in the *Person* section defaults to today's date.
If the **Case Creation Date** is set to a date other than today's date, ensure the Start Date is aligned with the Case Creation Date by clicking on the crayon icon for each Person.

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



13. The **Service Response** section of the form contains two very important fields.



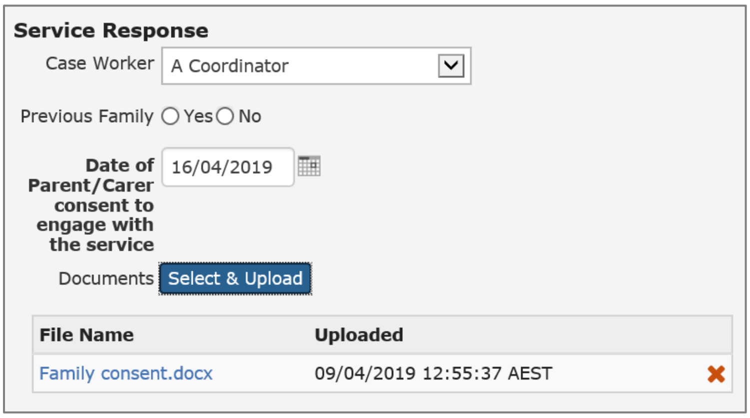
Firstly, in the **Case Worker** field, select the *Case worker* responsible for this family case from the drop-down list. The value defaults to the worker creating the **Case Summary**. If a worker has yet to be allocated to this **Case Summary**, select *Please select* at the top of the drop-down list. This will show as blank in the *Case worker* column on the **Cases** Page.
Refer Managing Cases for more information.

14. Click **Save**.

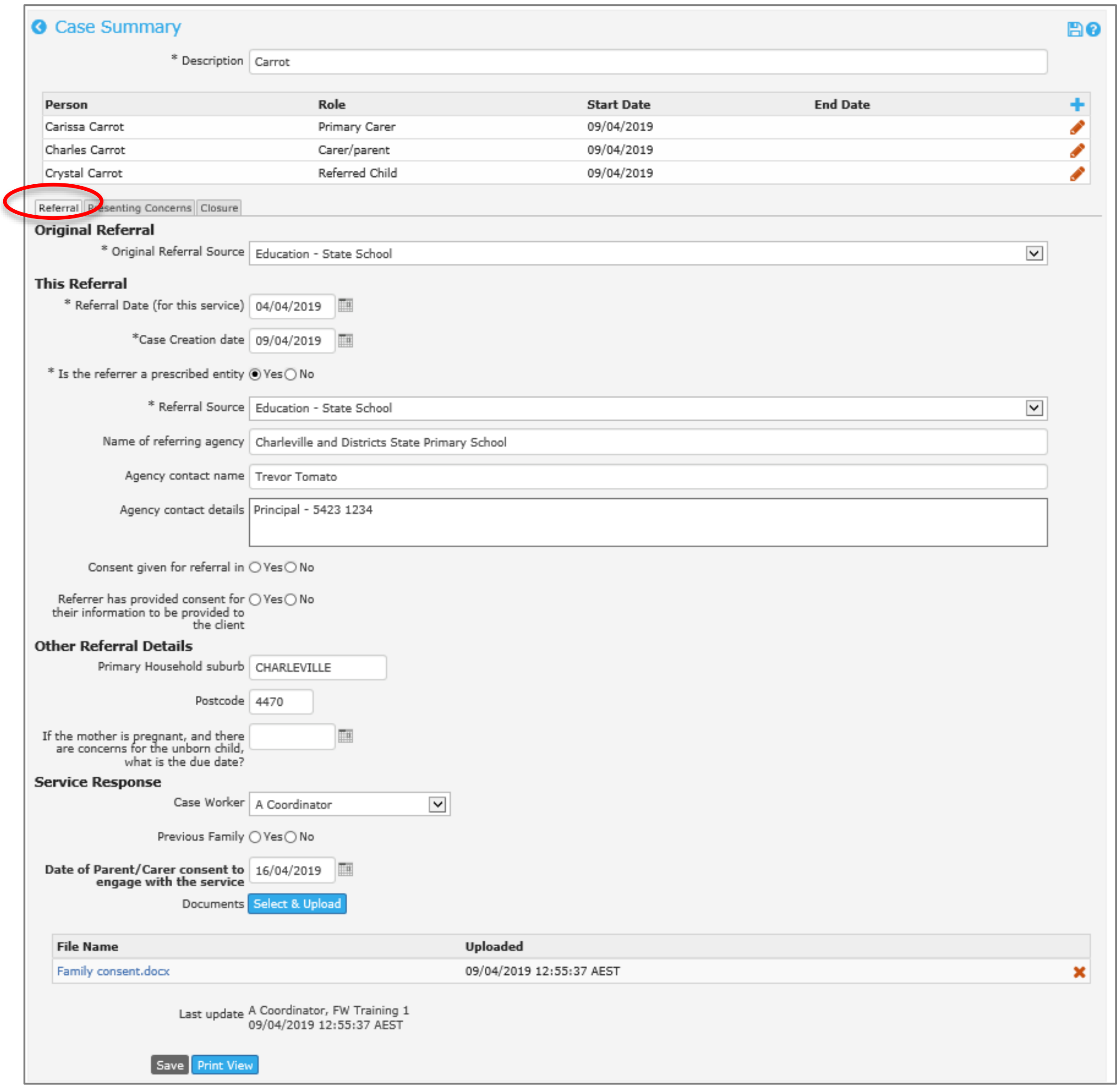
15. **Secondly**, **Date of consent to engage with the service*** is the date the family consented to work with your service. ***This field is very important for reporting purposes***.
Typically, this will be obtained some time after you have created the Case Summary, when the family has signed your organisation's consent form.

16. A scanned copy of the signed consent form, together with the pdf of the referral and other documents relevant to the Case, can be attached as documents to the **Case Summary**.

Select the *Browse / Select and Upload* button or 'drag and drop' to attach the required documents.



An example of the completed ***Referral*** sub-tab for the **Case Summary** :



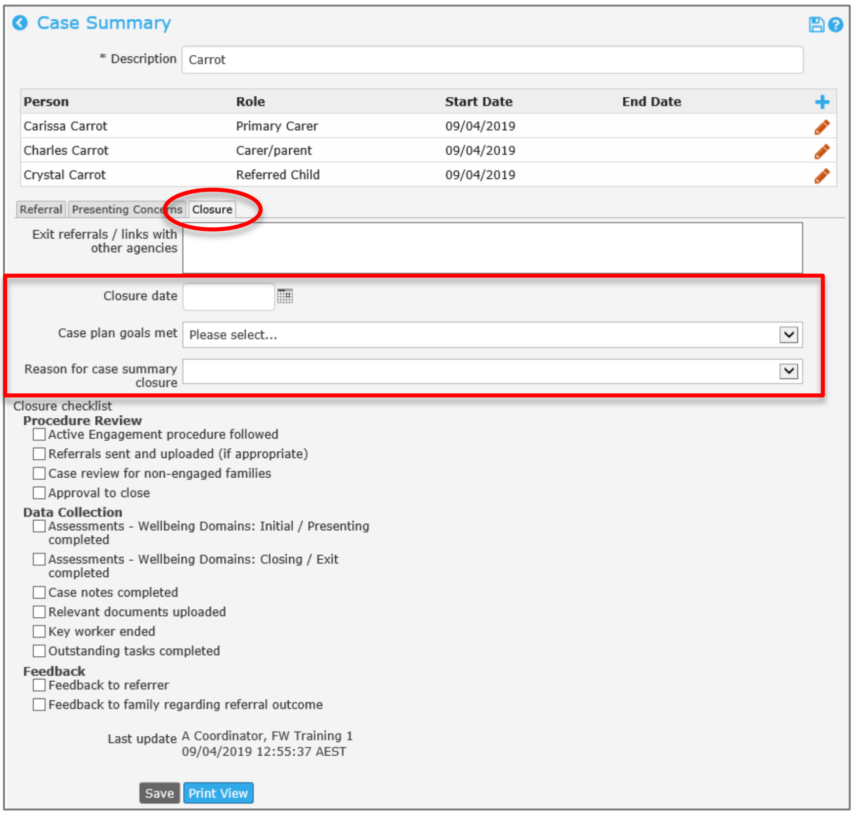
4.4 Close a Case / Case Summary

The accurate closure of the Case / Case Summary is very important for evaluation and reporting purposes.

Closing a Case Summary means you have finished working with the family.

Complete the following steps to close a Case / Case Summary :

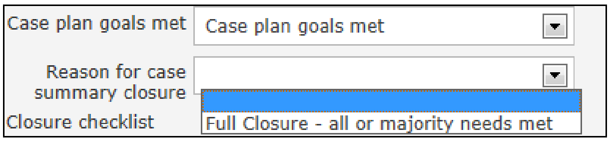
1. Open the **Case Summary** by :
   a) selecting it from the **Details** tab (on the **Persons** page) or
   b) from the list displayed on the **Cases** page.
2. Open the **Closure** sub-tab.



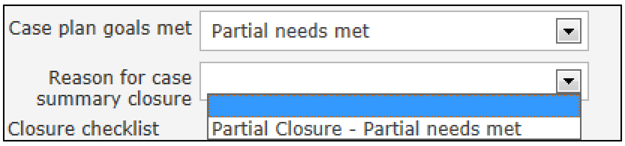
3. Enter the details of the **Exit Referrals/Links with other agencies** in the box provided.
4. Enter a **Closure Date***
   This updates the **End Date** for each Person in the Case Summary.
   This **End Date** displays against the **Case Summary** on their **Persons** page, **Details** tab.
   <u>**NOTE**</u> : If the Closure 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.
5. Complete **Case plan goals met*** from the drop down list.
6. Complete the **Reason for case summary closure*** from the list of values available (can only select one).

<u>**Note**</u>: The list of values for **Reason for case summary closure** * vary according to the response selected for **Case plan goals met*.** The following screenshots show these differing lists :

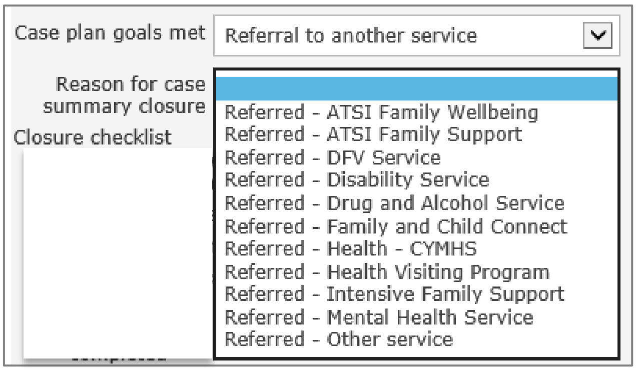
For ***Case plan goals met :***



For ***Partial needs met :***



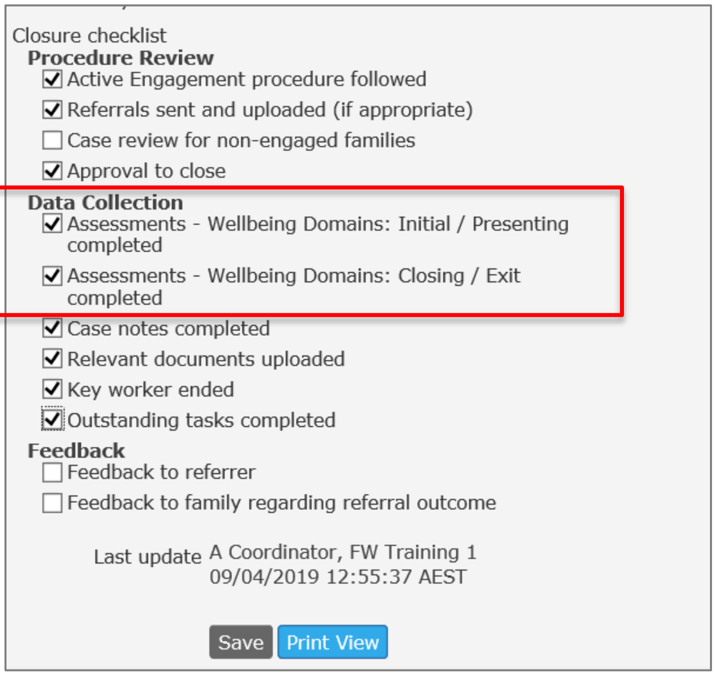
For ***Referral to another service :***



For ***Early exit*** :

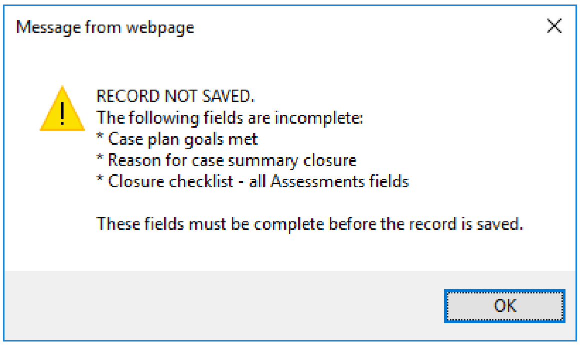
7. Complete the **Closure checklist** - Procedure Review, Data Collection and Feedback sections as appropriate.

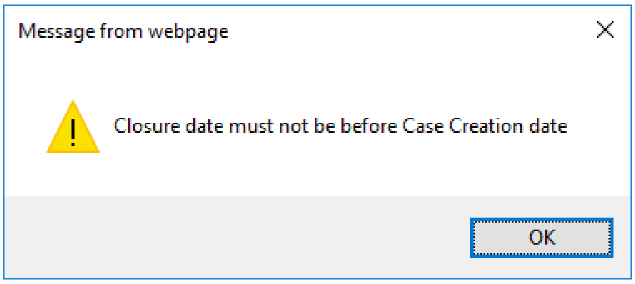
<u>VERY IMPORTANT NOTE</u>: Data collection for the Wellbeing Domains Assessment is mandatory and must be completed ***<u>prior</u>*** to closure of a Case Summary.

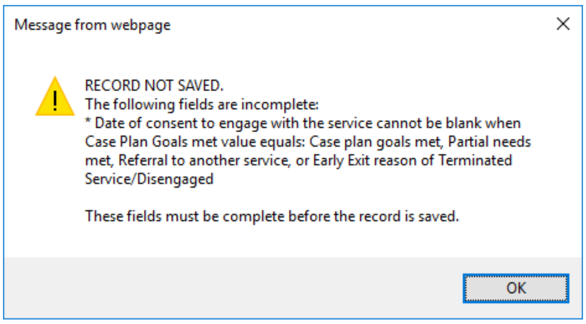


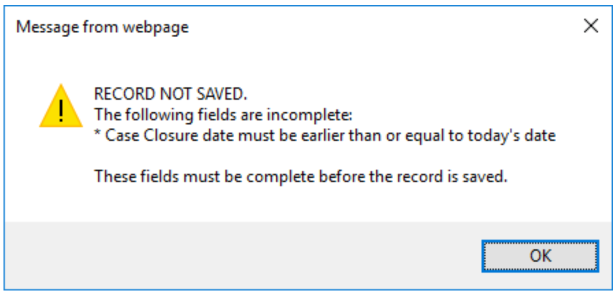
8. Select **Save.**

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







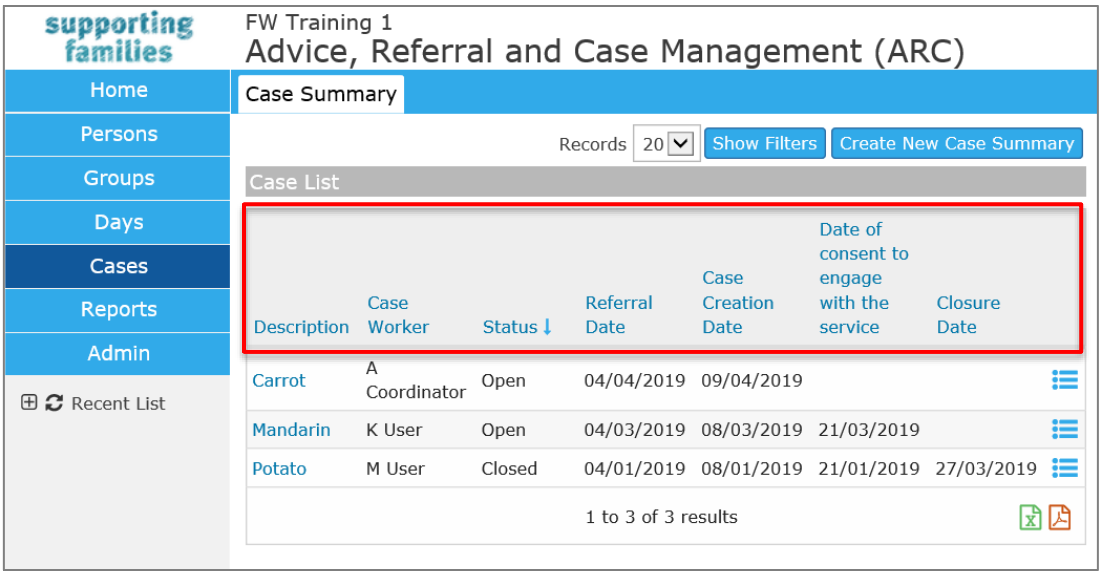


The following tasks are <u>also required to be completed upon Closure</u> :

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

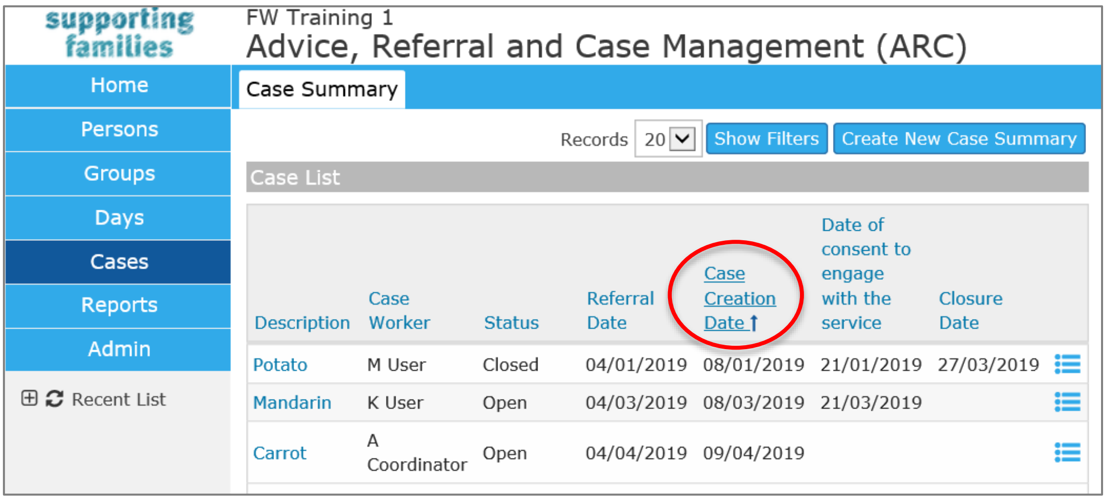
4.5 Managing Cases from the Cases Page

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



a) Order by column

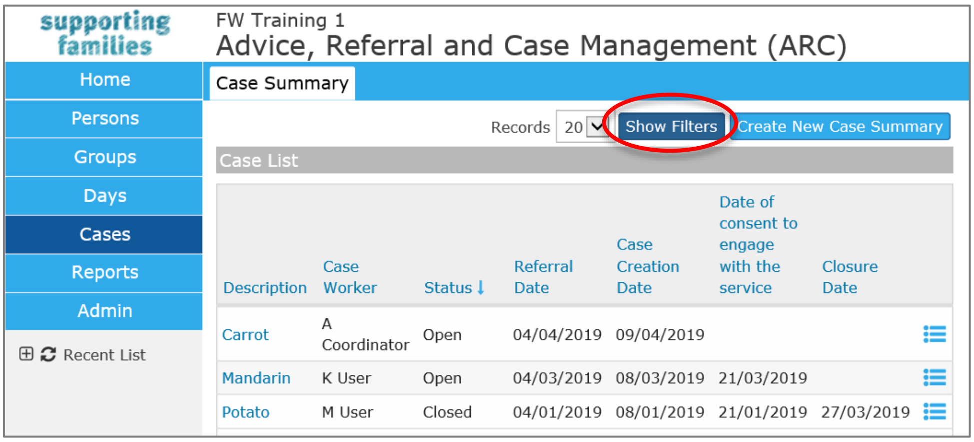
The display of Cases can be actioned from each column. Status is the default sort column. Simply click the column to activate as the display (the blue arrow will show), and click again to change the direction of the display (the blue arrow will change direction).



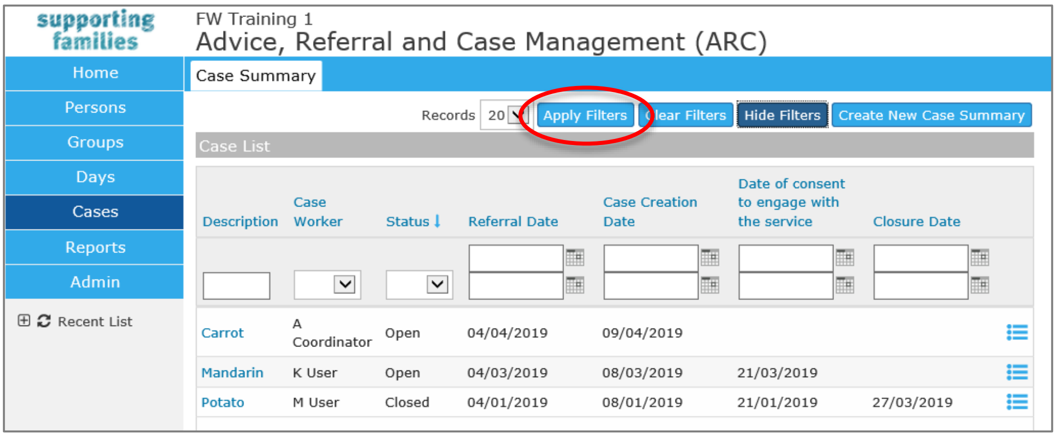
b) Apply filters

The initial view of the Cases Page contains all Cases created within your services – all Open and all Closed cases. With time, this will become a very long list!

The **Show Filters** feature enables you to efficiently locate the Cases you are looking for.



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

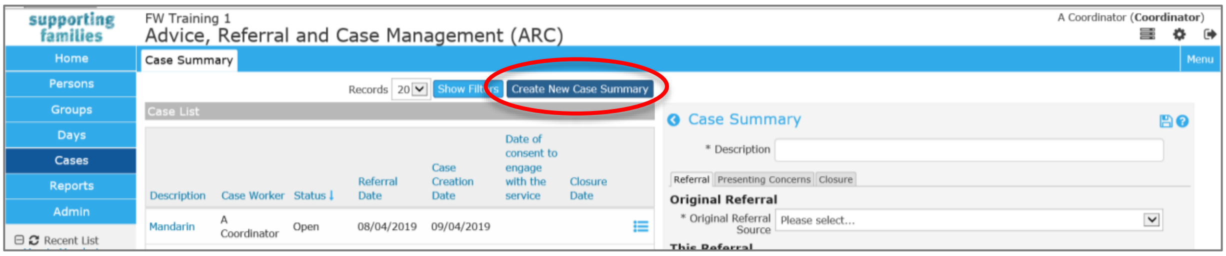


Clear Filters – will clear the previous values and enable you to tailor a new search.

Hide Filters – returns you to the complete List view.

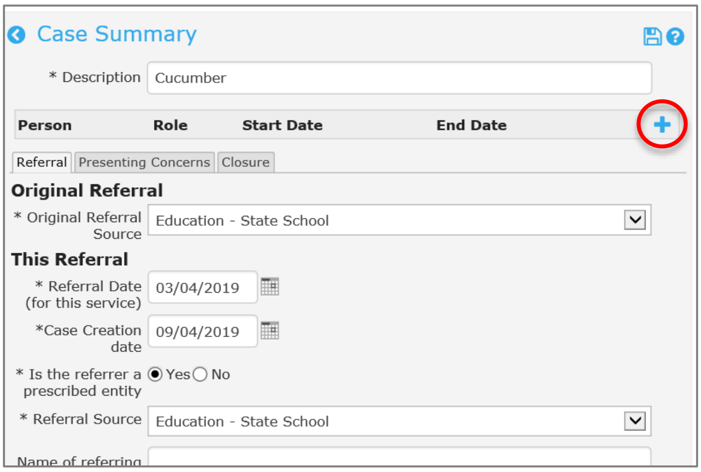
c) Create new Case Summary

You can create a new Case Summary directly from the Cases page.
Click **Create New Case Summary** and the form will open on the right of the screen.



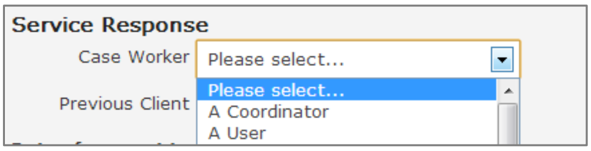
Simply complete the 6 mandatory (*) data fields and click **Save**.

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



The **Person** section will appear (after the Case Summary is saved). Click on the  icon to attach the relevant Person records.

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

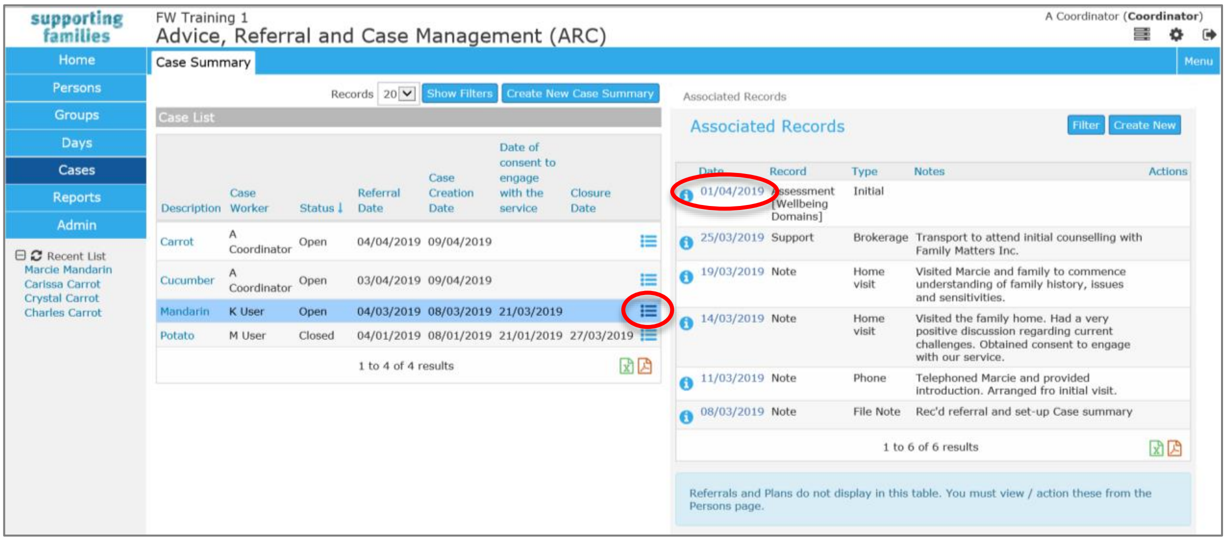


d) View associated records

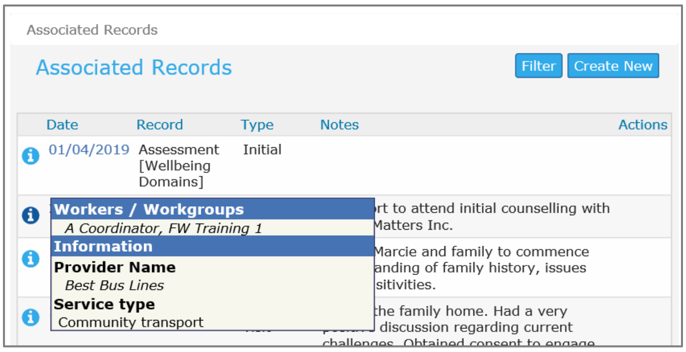
The  icon on the list view of the **Cases** Page opens a short-cut to Notes, Supports, Assessments and documents associated with the Case Summary.

<u>NOTE :</u> Plans and **Referrals** must still be accessed from the **Persons** page**.**

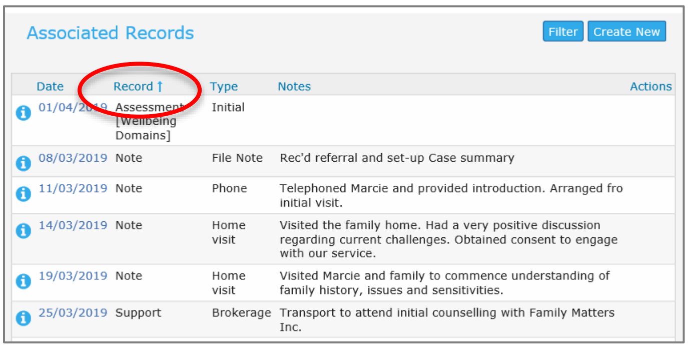
The individual forms can be opened by clicking on the date link.



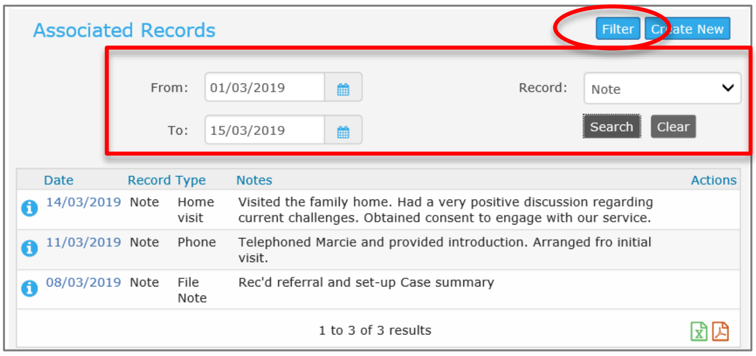
The  button provides a snapshot of the relevant data pertaining to that record.



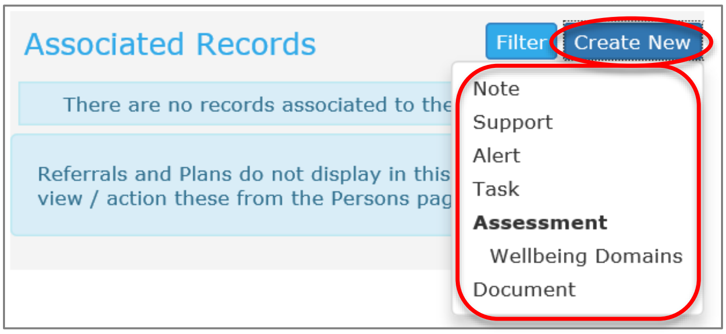
The display of records can ordered by clicking each column – with the arrow indicator appearing.



The **Filter** button enables you to define the parameters of your search.
Select the *Record* type.
If required, select the date range you wish to see those records for.
Click **Search**.



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



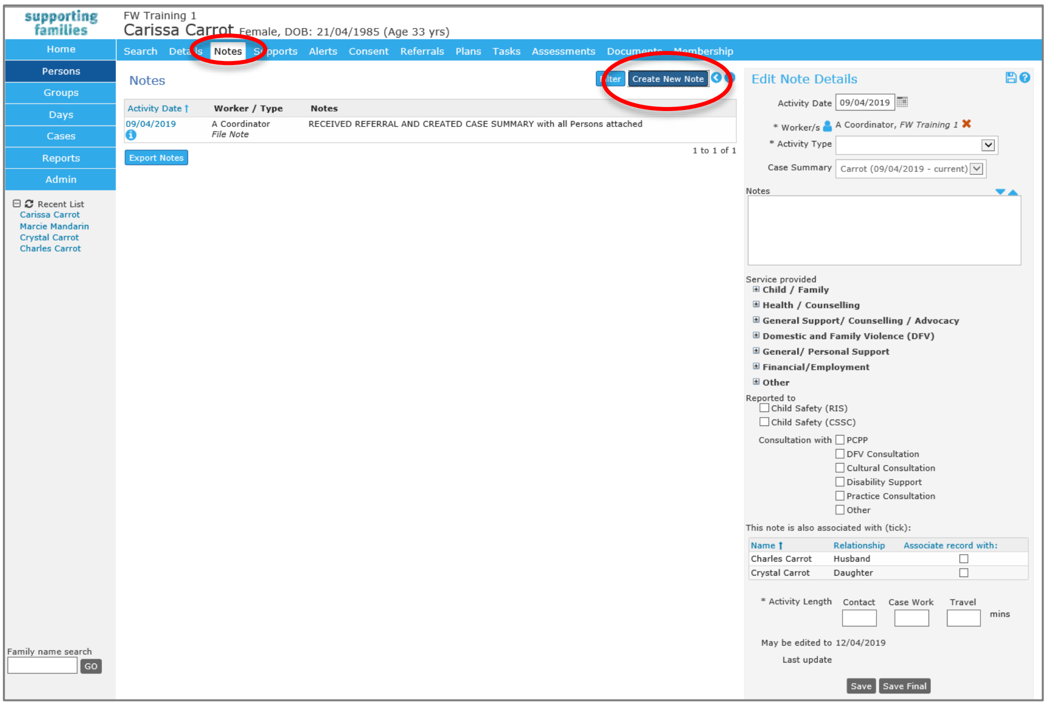
The Persons attached to the **Case Summary** are automatically included in each form. If the particular record only pertains to one Person, simply uncheck the box for the other Person/s listed.

5 Add Notes

Notes (located in the **Persons** page, **Notes** tab) are important for capturing time spent by the worker/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).

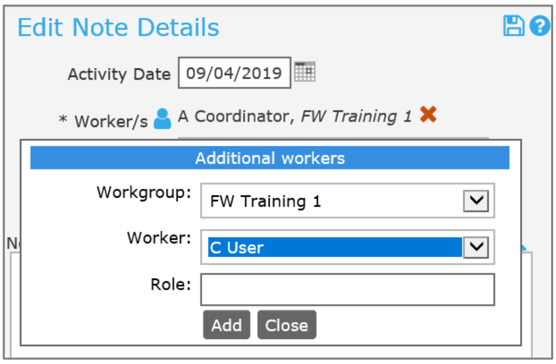
1. From the **Person** page, select the **Notes** tab.
2. Click **Create New Note**. The Note template displays on the right-hand side of your screen.

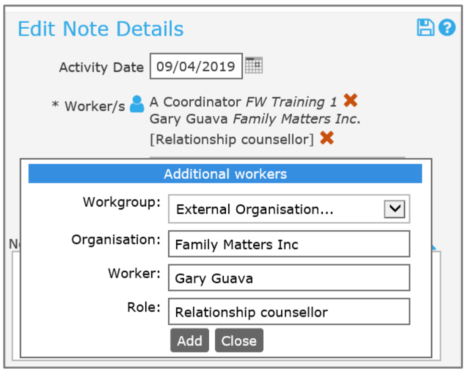


3. Enter **Activity Date** of note (can be backdated).

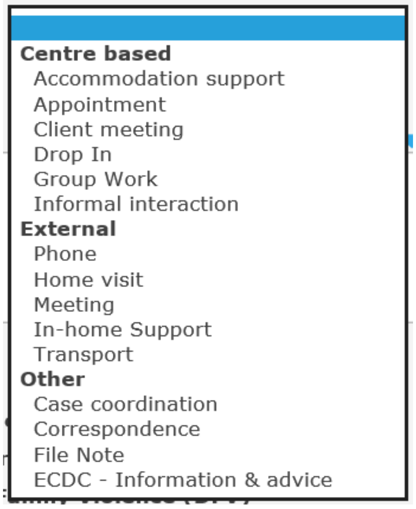
4. Add **Worker/s**. The worker will default to the user entering the data.
   Where other workers were involved in the activity, they can be added to the Note by selecting the icon. This is more efficient and more accurate for record purposes. The Note time will be automatically allocated to **<u>each</u>** worker for that Note in your service reports.

   External workers can be added to the note to record their attendance. (Persons external to your service do not have access to ARC.)





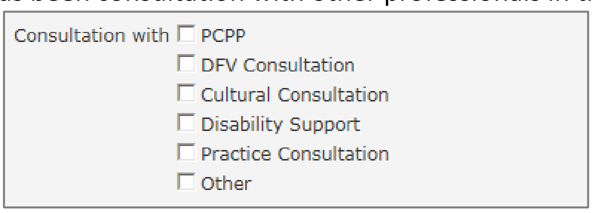
5. Select the relevant **Activity type** from the list. E.g. Client meeting or Home visit.



Activity Type *ECDC – Information & advice* : is **only** to be used by your Early Childhood Development Coordinator.
This is specifically linked to the reporting required for this position.

6. The **Case Summary** field will display the active **Case Summary** for this Person.
7. Record any relevant comments in the **Notes** box.
8. The check boxes for *Service provided* offer a short-cut to record the nature of the activity. These are not mandatory. The use of these is to be defined by your service.
9. Select if the details of the Note have been **Reported to** Department of Child Safety (CSSC) or Department of Child Safety (RIS) by selecting the tick boxes.

10. Indicate if there has been consultation with other professionals in the conduct of this activity.

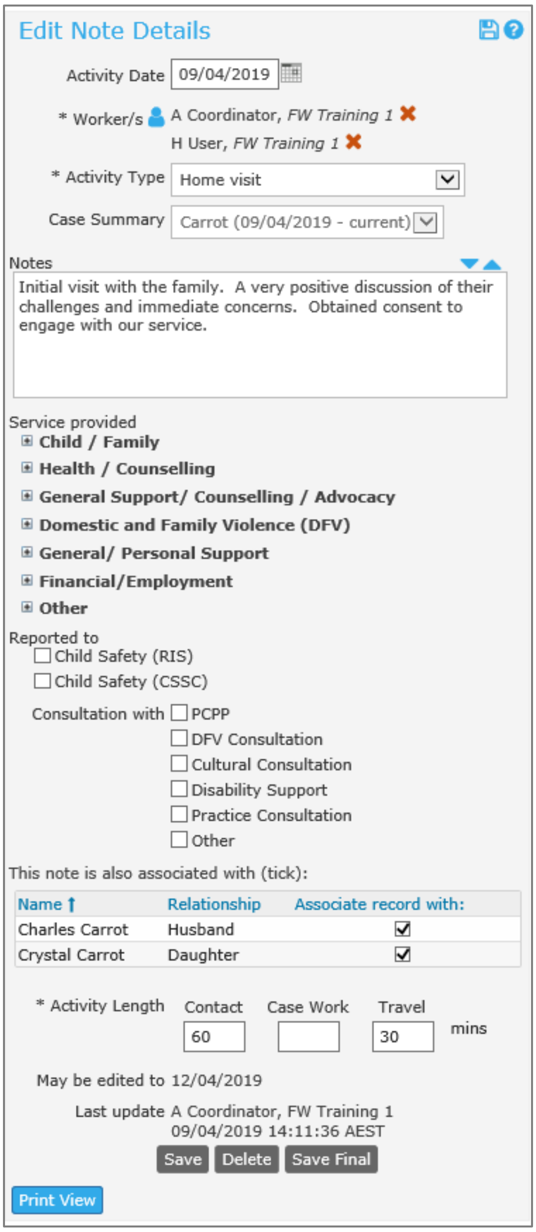


11. If the note is associated with other persons in ARC that are associated/related to the client select the person from the **This note is also associated with** section.
Refer section Create Relationships for more information on creating relationships.

12. Enter the time spent with or on behalf of the client in the **Activity Length*** field.
Enter minutes only.
    - *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)

13. Select **Save** to save a draft of the note - all notes will become locked/un-editable after 3 days of saving.

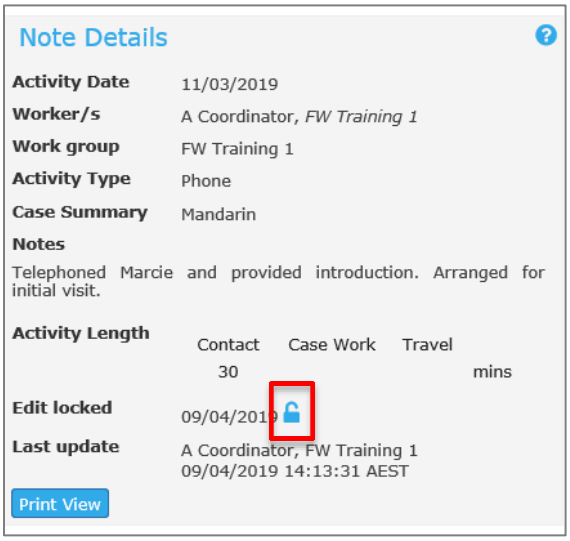
14. Select **Save Final** to lock the note.

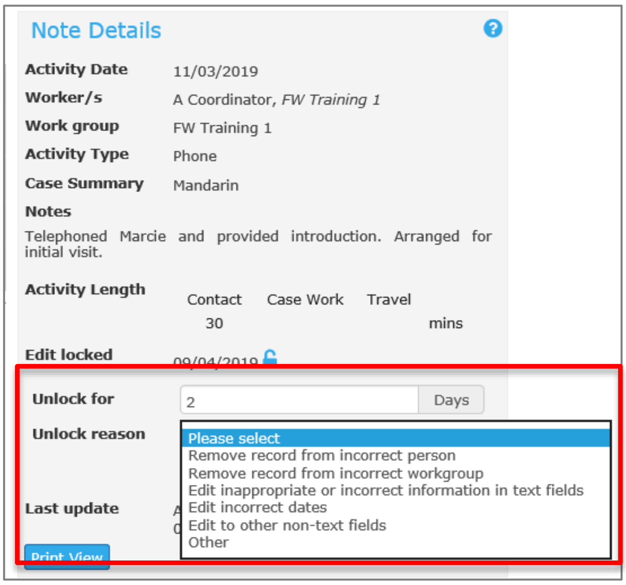


Additional Notes:

A user with Coordinator access level is able to *delete* a Note record that is not locked.

A user with Coordinator access is able to *unlock* a locked Note.





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

1. Enter the number of days you wish the record to be open for (it will autmatically re-lock after this time).

2. Select an **Unlock reason** Note **1**
3. Click **Save.** The note is now able to be edited.

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

TIP

Notes are not able to be grouped or flagged with a particular Case / Case Summary. To assist with easily identifying which notes pertain to a particular Case Summary, the use of simple CAPITALS in the Note to record the creation and closure of the Case Summary may be useful.

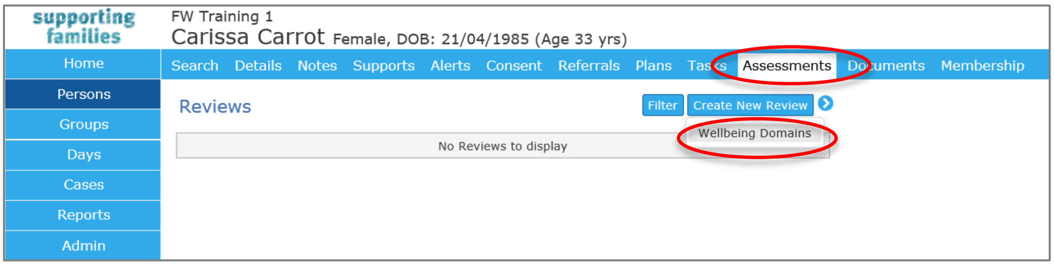
6 Assessments

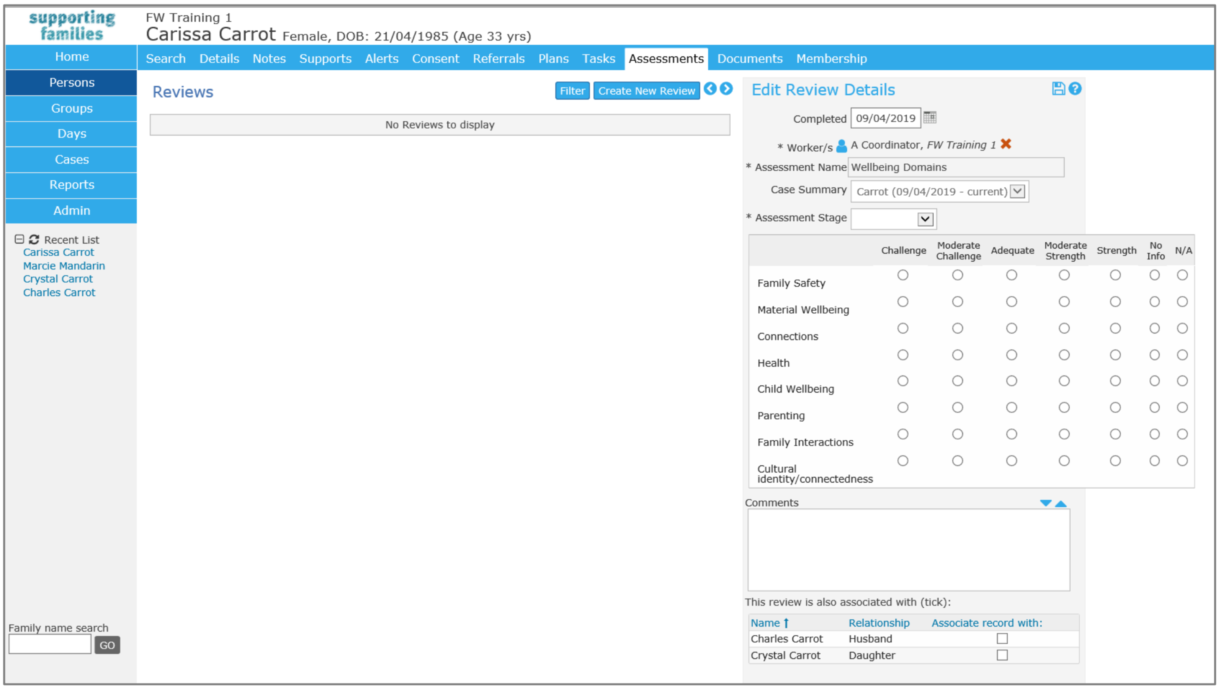
6.1 Record Assessments

Assessments are recorded in the **Persons** page, **Assessments** tab.

The full ***Wellbeing Domains Assessment*** document is available from the **Admin** page, **Documents** tab.

1. On the **Persons** page, select the **Assessments** tab
2. Hover over **Create New Review** and select ‘Wellbeing Domains’.

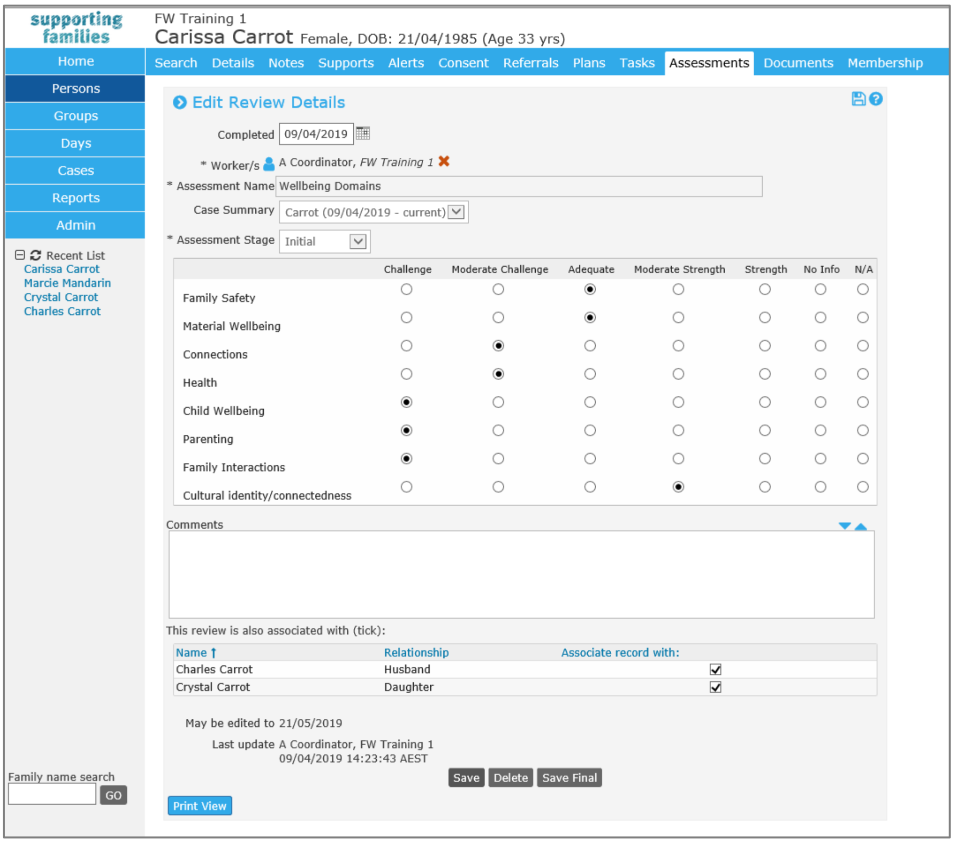




6.2 Complete *Wellbeing Domains* Assessment

From the completed paper/hard copy of the Assessment, record the results :

1. Enter **Completed*** date (can be backdated).
2. The **Worker/s** field will default to the user entering the Assessment into ARC. If additional workers were involved in the Assessment, select the icon to add the relevant worker/s from the drop down list. To delete workers, select the icon
3. Select **Assessment Stage***: *Initial* for the first assessment completed for the family, *Subsequent* for a review and *Closing* for exit assessment
4. Enter the rating for each domain
5. Record any notes in the **Comments** box if required
6. Select the relevant family members in the **This review is also associated with** section by ticking the checkbox
7. Select **Save** to save the record (all assessments will become locked/un-editable) after 42 days of saving. To modify a saved record, select the assessment from the list screen and update as required then select **Save.**
8. Select **Save Final** to lock the assessment (cannot be modified)
9. Assessment can be printed by selecting **Print View**



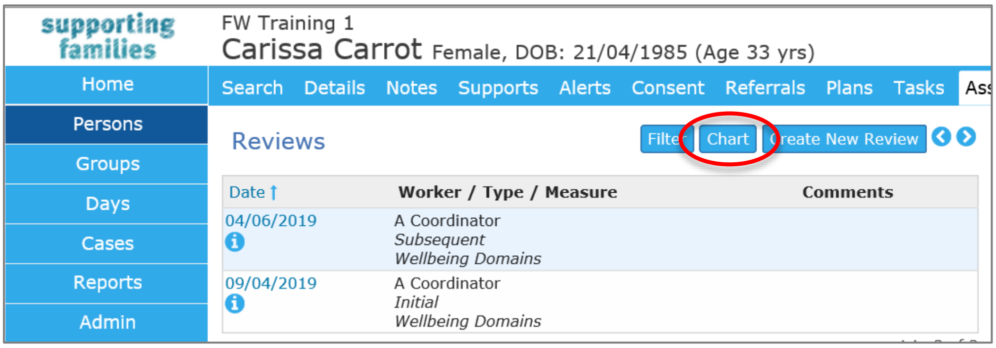
Additional Notes:

- A user with Coordinator access level is able to delete an assessment record that is not locked.
- Assessments will lock (not be able to be edited) 42 days after the record is first saved. This is shown at the bottom of the form : *May be edited to dd/mm/yyyy*

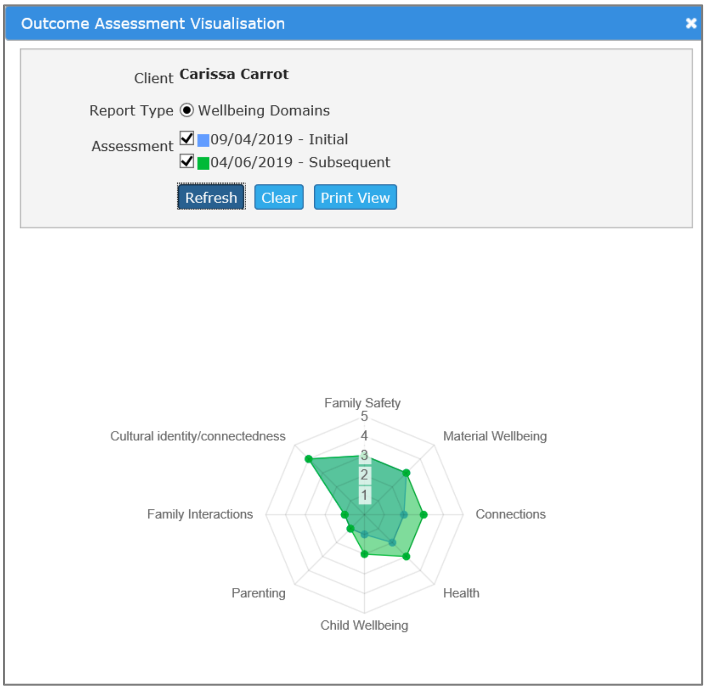
6.3 Compare Wellbeing Domains Assessments

For Wellbeing Domains Assessments, users can compare the latest version of the Initial, Subsequent and Closing Assessment using the chart function. The Chart can be opened as PDF and printed. This can be a useful tool for the worker and also as a discussion point with the family.

1. From the **Persons** page, select the **Assessments** tab.
2. Select **Chart** (note this will only display if there is one or more assessment completed)



3. Select the Wellbeing Assessments you wish to compare by ticking the checkbox, and click **Refresh**



4. Users can print the chart by selecting **Print View** or clear the comparison by selecting **Clear**

Additional Notes:

- The chart will only display the most recent outcome per type, e.g. it will only compare the most recent 'Initial Assessment' against the most recent 'Subsequent Assessment' and most recent 'Closing Assessment'. You are not able to compare two 'Subsequent assessments using this functionality.

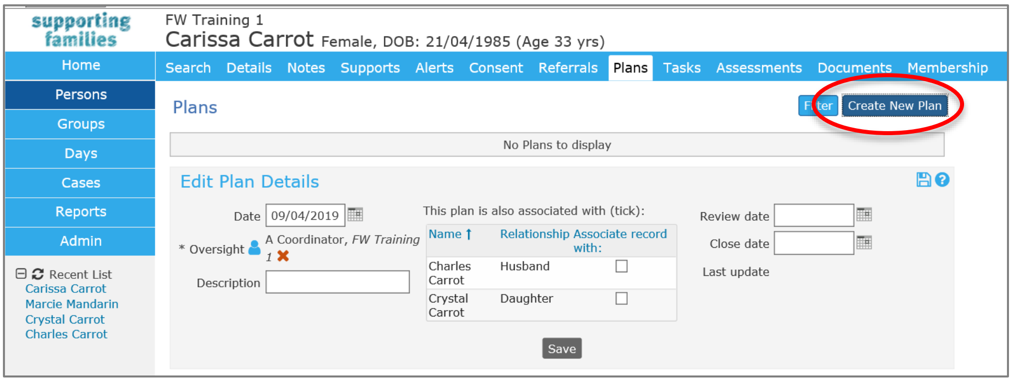
7 Plans

A Plan is a structured schedule of activities targeting the required support for the family.
The **Plans** tab enables you to create and maintain a case plan for a family.

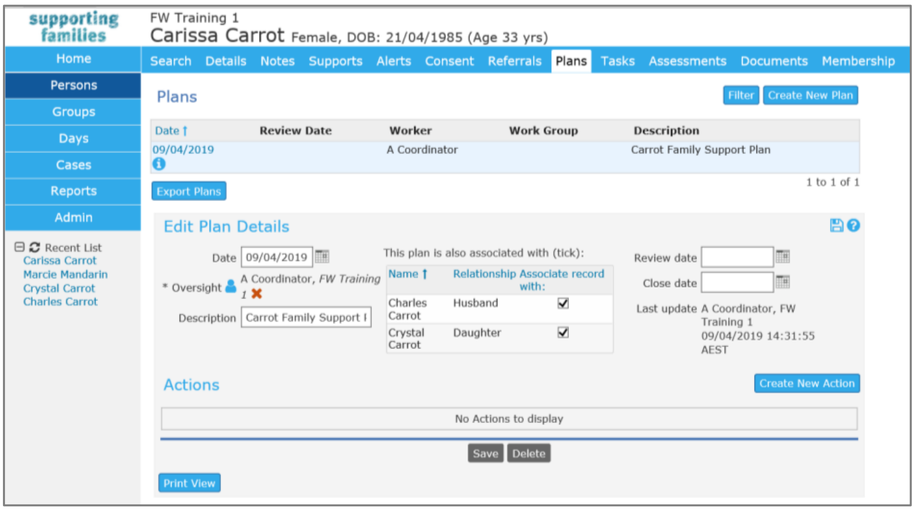
A family can have multiple plans, if this is required for the specific needs being addressed by your service. Each plan can have multiple actions enabling the identification and recording of issues, goals, actions and outcomes.

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 below.

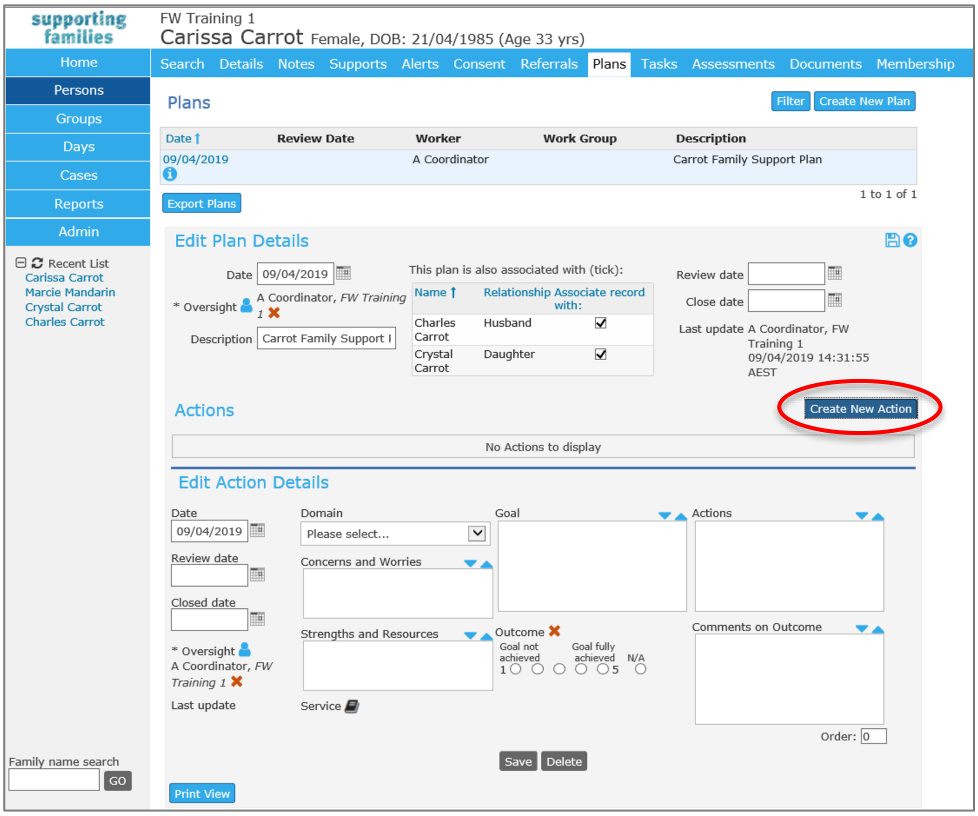


3. Enter the **Date*** and **Review date** (if required) by using the calendar icon.
4. In the **Description** field, record the name of your plan in line with the procedures of your service.
5. The **Oversight** field will default to the user entering the Plan. If additional workers are involved in the Plan, select the icon to add the relevant worker/s from the drop down list. To delete workers, select the icon
6. In the **This plan is also associated with** section, select the family members involved in this Plan (as for the Case Summary).
7. Click **Save**. Once the plan is saved, you are able to add Actions.



7.2 Create new Action within a Plan

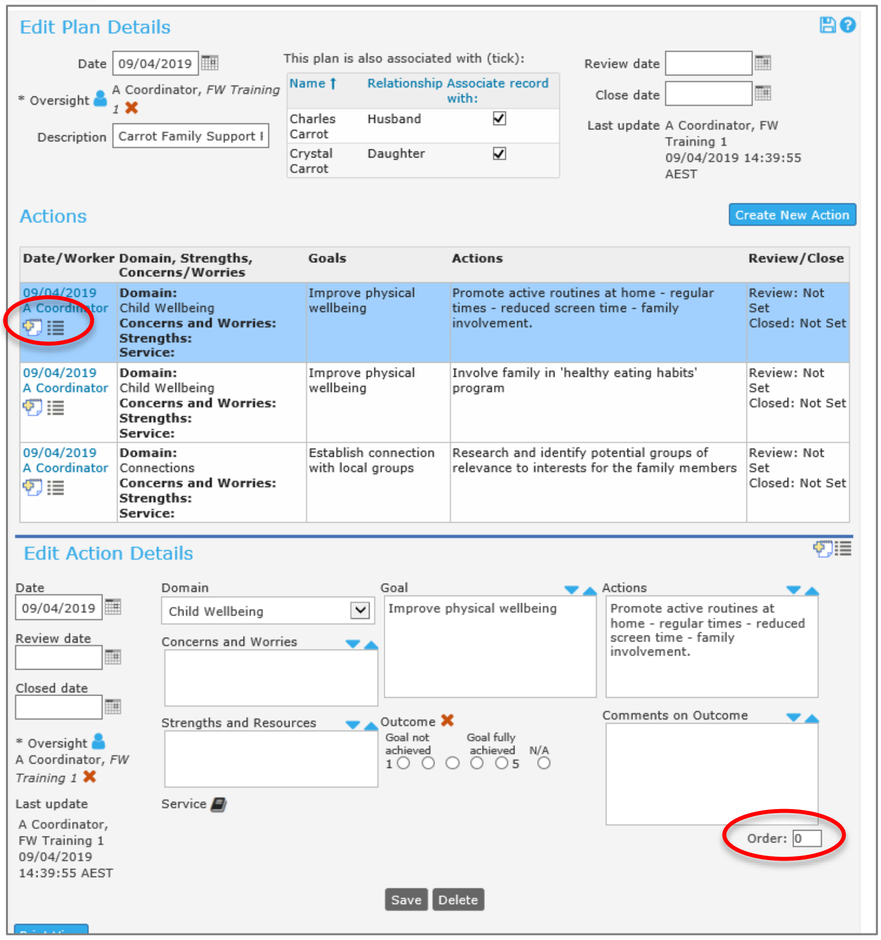
1. On the **Edit Plan Details** form, select **Create New Action**.

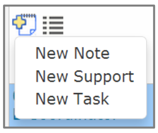


2. Enter the **Date** and **Review date** (if applicable).
3. The **Oversight** field will default to the user entering the Action. If additional workers are involved with this Action, select the icon to add the relevant worker/s from the drop down list. To delete workers, select the icon
4. Select the **Domain** from the list box.
5. Enter details for the **Concerns and Worries**, **Strengths and Resources**, **Goal** and **Actions**.
6. The *Service* icon opens the *Service Directory* - the Infoxchange Service Seeker database or select from the list of Favorite services to reflect the involvement of an external service with this Action. To remove a Service from a plan, select the icon.

   Note: The adding of a Service is for information purposes only. The external Service does not have access to ARC and any referrals (from the icon) must be manually communicated.
7. To change the order in which the Actions appear in your Plan, highlight the Action in the Plan and enter the required position in the **Order** field in the bottom right corner of the screen.
8. Select **Save**.
9. To record another Action, click **Create New Action** – the details screen will display. Complete as above and **Save**.
10. 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.

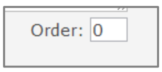
An example of a Plan with Actions is shown below :
The highlighted Action is the one which displays at the bottom of the screen.





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

The 'dots and dashes' icon displays all records created in respect of this Action. This is very efficient to focus on the specific Action, rather than scrolling through all Notes recorded on the Notes tab.



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

Additional Notes:

- When using plans for the first time, it is recommended to keep the plan relatively simple - create a new action for each different issue.
- If you are conducting joint case management, it is possible to allocate multiple / different workers for the plan oversight or as the responsible worker for a specific action. The Review Date will prompt a task in the worker's **My Tasks** tab.
- You can record an external worker against an Action - this is for information purposes only as they do not have access to ARC.
- A closed action can be viewed by clicking **View Prior Action**. This is required if you wish to print all actions associated with a plan.

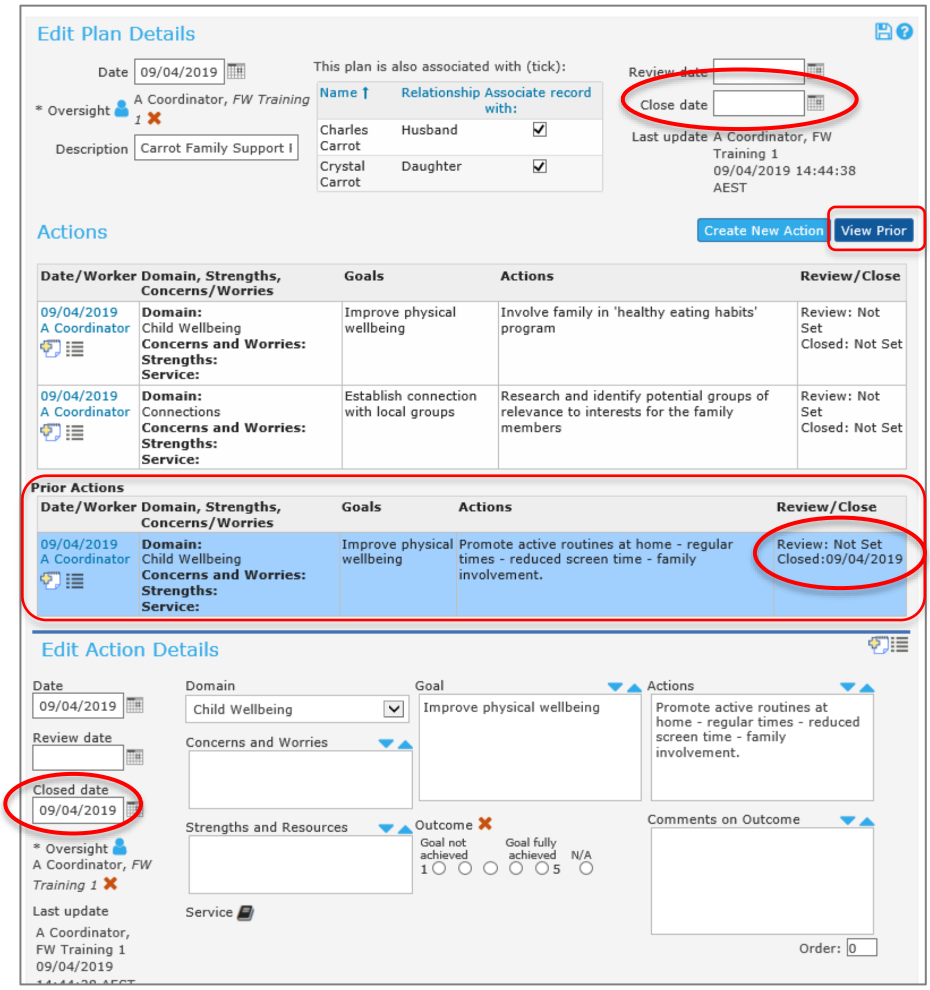
7.3 Close an Action within a Plan

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. You may choose to indicate the **Outcome** achieved based on the scale of 1 to 5 and record ant notes in the **Comments on Outcome** box provided.
   Note : this provides a visual display only and is not linked to any reporting.
5. Enter a **Closed date** and select **Save** (update any comments as applicable).

7.4 Close Plan

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

Note: Actions should be closed prior to the plan being closed – refer the preceding section.
As shown below, a Closed Action will show as **View Prior**.



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.

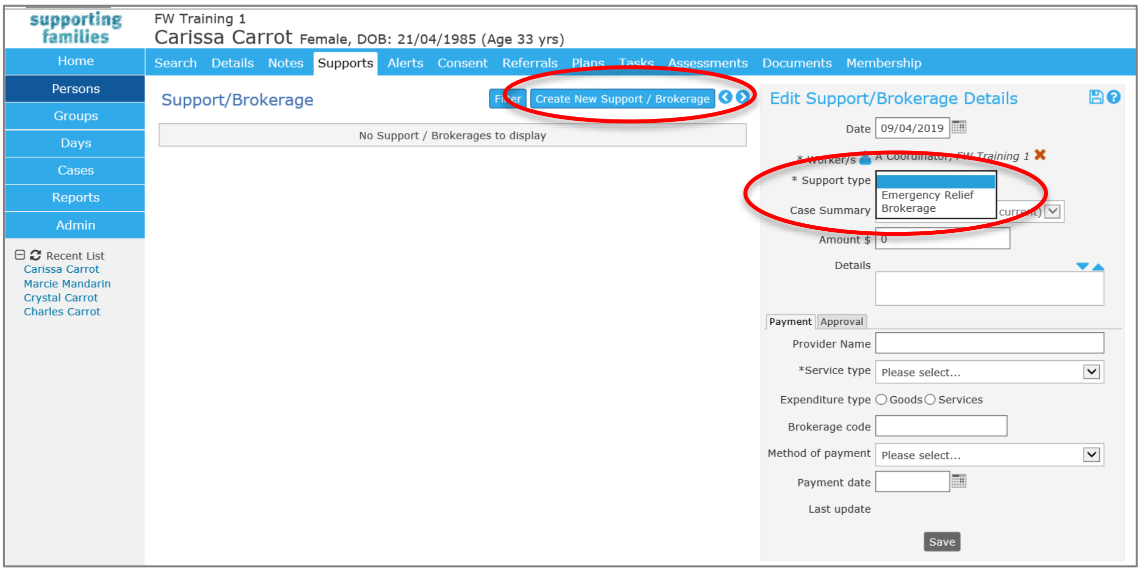
Note: This action is irreversible therefore should be completed with caution.

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. Click **Delete**. The Action will now be deleted.

8 Support / Brokerage

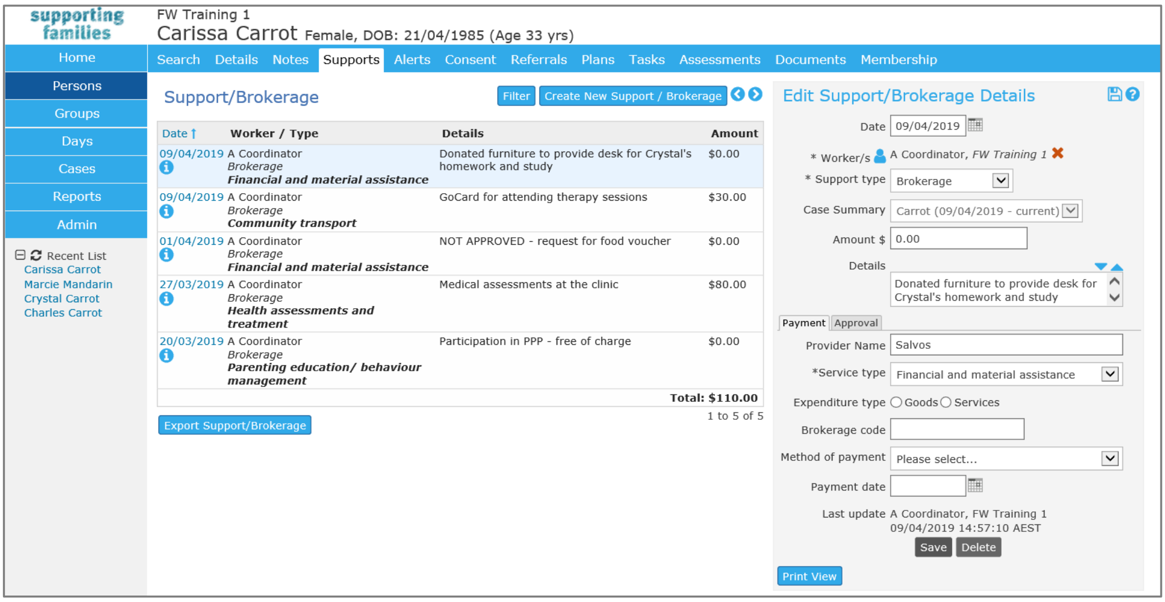
8.1 Create Support / Brokerage Payment

1. From the **Persons** page, select **Supports** tab.
2. Click **Create New Support / 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*** : *Emergency Relief* or *Brokerage*.
   Emergency Relief – for a family's immediate need eg. baby formula, nappies, food.

   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.
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.



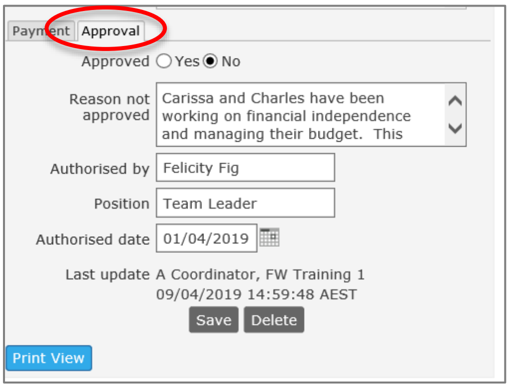
Additional Notes:

- 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)

8.2 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.



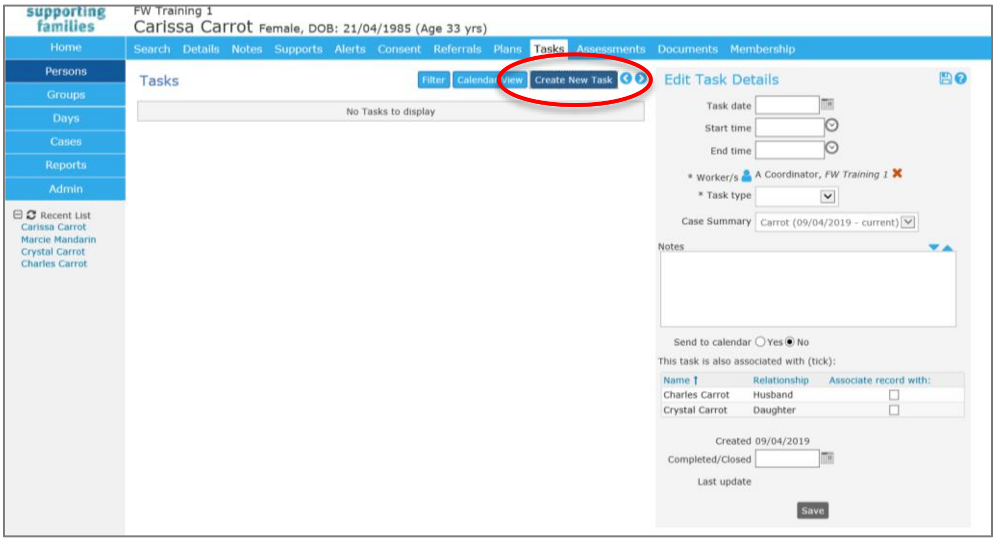
4. Enter **Approval** (Yes or No), if No is selected enter a **Reason not approved.**
5. Enter the **Authorised by**, **Position** and **Authorised Date**
6. Select **Save**.

9 Tasks & Alerts

9.1 Create a Task

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

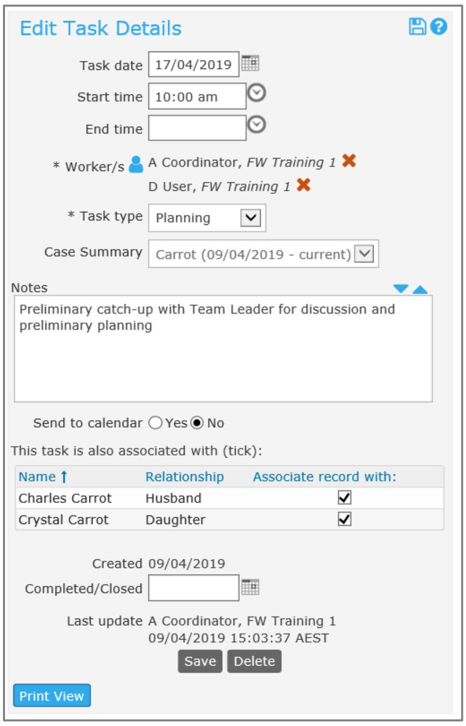
1. On the **Persons** page, select the **Tasks** tab .
2. Click **Create New Task**.



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 Outloook calendar invitation. All workers associated with the task will receive a Microsoft Outlook calendar invitation <u>if</u> their email address has been supplied via their User Preferences details.
7. Include related family members as relevant by checking the tickbox in the **This task is also associated with (tick) :** section.
8. Select **Save**

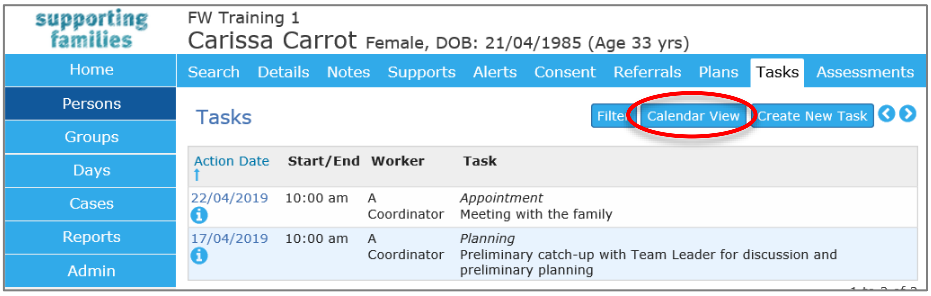
<u>**NOTE :**</u> When the Task has been completed, the **Completed/Closed** date field <u>must</u> be recorded – if not, the Task will continue to display on the **My Actions** and **Team Actions** tabs on the Home page.

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

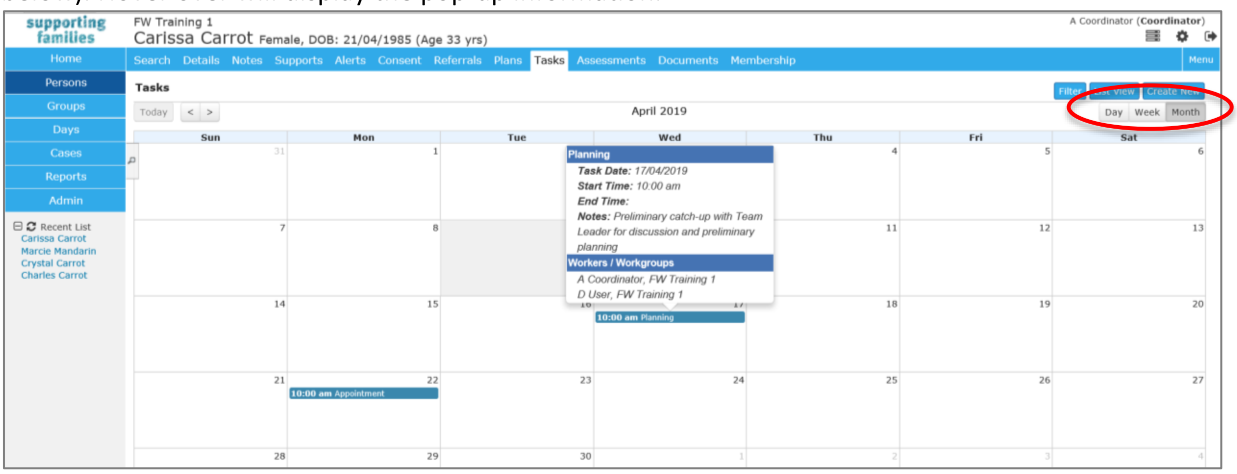


Tasks can also be created and viewed in a Calendar View which gives users a visual representation of scheduled tasks by Day, Week or Monthly views.

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

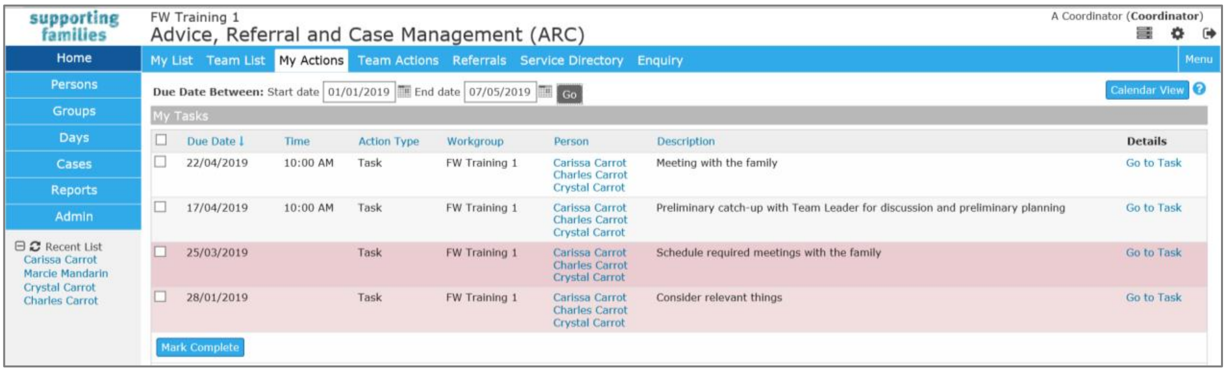


10. A schedule of tasks can be viewed by selecting the Day, Week or Month buttons (highlighted below). Hover over will display the pop-up information.



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

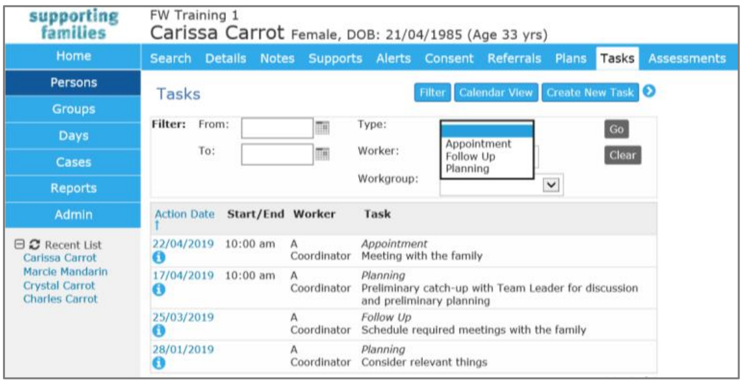
Overdue Tasks are highlighted in pink – as below.



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.
- You can filter the tasks list by clicking **Filter** and selecting the desired date range, type or worker.

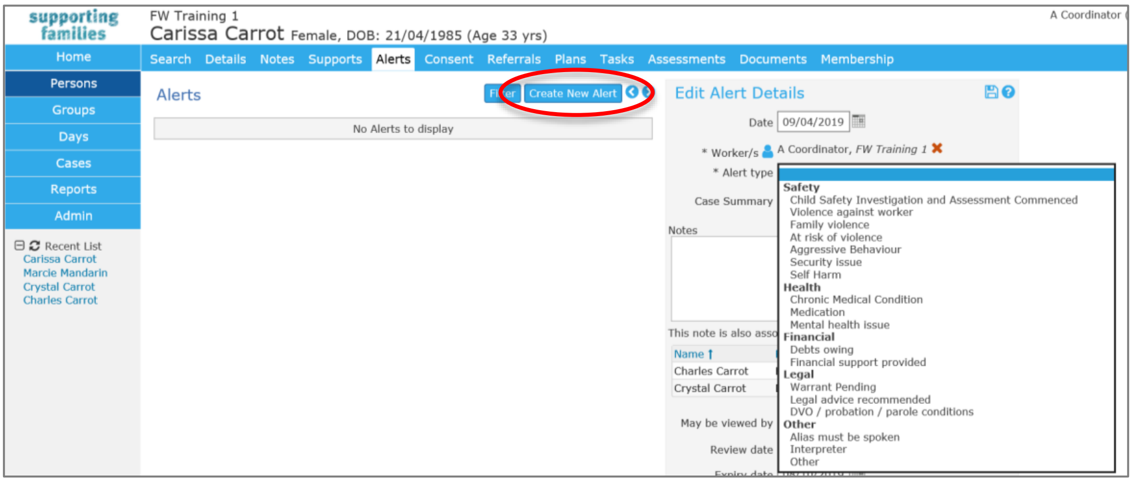


- A user with a Coordinator access level is able to delete a task record.
- If *Send to calendar* has been selected, a message will be displayed at the top of the Edit Task Details form: either a confirmation that the invitation was sent or an error message that the calendar invitation was not able to be sent.

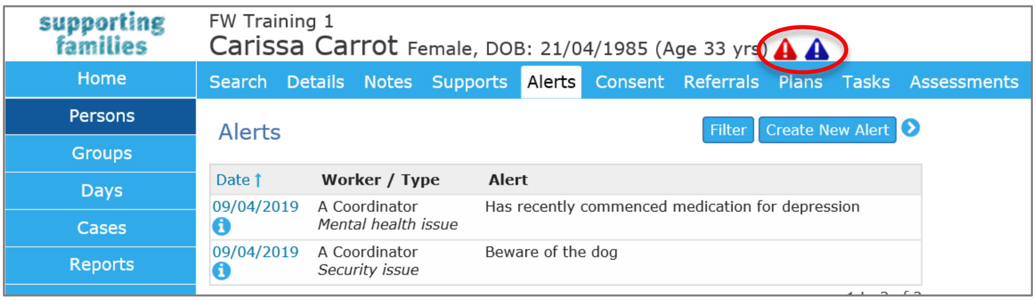
9.2 Create an Alert

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. Click **Create New Alert** – the Edit Alert Details form will open on the right-hand side.
2. Enter **Date**. This can be backdated.
3. The **Worker/s** will default to the user entering the Alert record.
   To add more workers, select the icon. To delete workers, select the icon.
4. Select the **Alert type.**



5. Enter details about the Alert in the **Notes** box.
6. Tick the checkbox against related Persons, as relevant, to have the Alert also display on their record.
7. If relevant, enter a **Review date** (the task will appear in the **My Actions** / **Team Actions** tabs on the **Home** page).
8. Select **Save**. A warning icon will appear next to the person's name, as highlighted below. (For the icon to display, click out of the Alert 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.



9. When an Alert is no longer relevant / required, open the Alert and record an **Expiry date**.
10. Click **Save**.

Additional Notes:

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

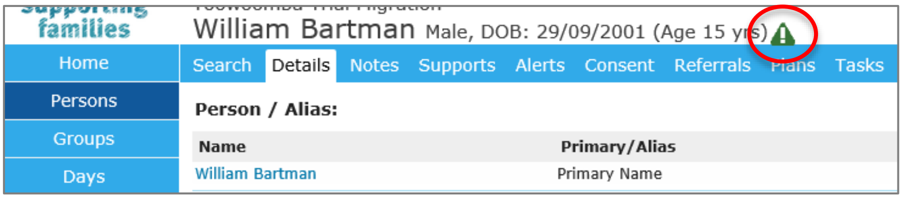
9.3 The Green Alert

Some Family Wellbeing services commenced operation with the migration of client data from their Family Support Program. The Aboriginal and Torres Strait Islander Family Support Program (which preceded the Aboriginal and Torres Strait Islander Family Wellbeing Program) was supported by the information technology system CSIS, Community Sector Information System.

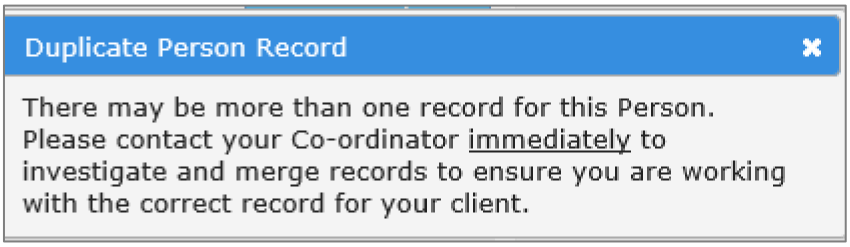
CSIS was a case-based system. ARC (based on the Infoxchange SRS product) is a client/person-based system. The implications of this was that if a family had been referred to the Family Support service more than once , a Person record was created in ARC for each referral/case migrated from CSIS.

Having more than one record for a Person in ARC causes considerable confusion for users and is a risk for service delivery.

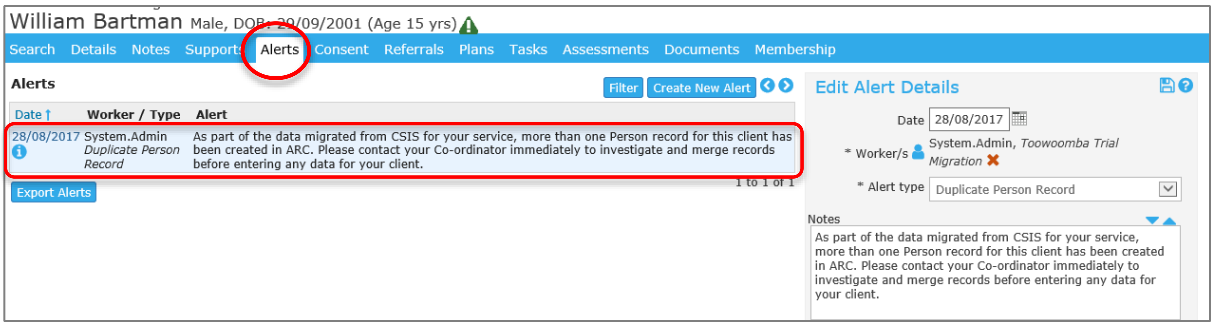
To help identify clients for whom duplicate Person records were created upon migration, a **green** *Duplicate Person Record* Alert was attached to each of their Person records in ARC.



When a Person record with a **green** Alert is opened, the following message appears on screen:



The *Duplicate Person Record* Alert record (on the Alerts tab) for that Person displays :



By using the **Search** tab on the **Persons** page, establish how many records for that Person exist by using a truncated version of the *Given Name* and *Family Name* with the % wildcard - ie. rather than type in the name *Anne Smith*, enter *An%* and *Sm%*

Where the surname (family name) of the Person may have changed over time, just use the Given Name *An%* to perform a complete Search for records for that Person.

There are 2 scenarios which will arise:

1. The Person has 2 records
2. The Person has more than 2 records.

To resolve the 2 scenarios, refer to the recommended steps below :

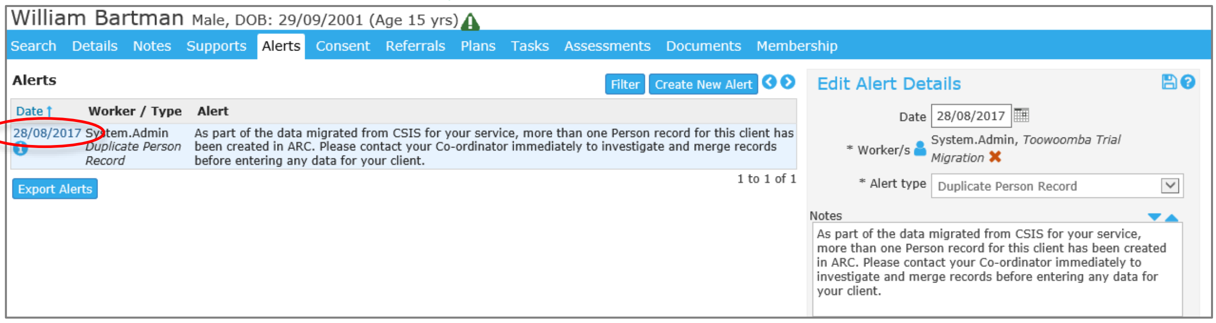
1. DIRECT Merge – where there are only 2 records for the Person
2. MULTIPLE Merge – where more than 2 records exist for the Person.

Resolving (merging) duplicate records can only be performed by a team member with *Coordinator* user access. For additional guidance on Merging Person records – refer to Section 20.4

Navigate to the **Admin** Page, **Merge** tab.

For DIRECT Merge records

1. On the ***Merge Persons*** subtab
2. In the **Search for primary record** box,
   enter *Given Name* * and *Family Name* * and check the Fuzzy box
   * Use a truncated version of the *Given Name* and *Family Name* with the % wildcard
   ie. rather than type in the name *Anne Smith*, enter *An%* and *Sm%*
3. Click **Select** for the record you want to keep
4. In the **Search for secondary record** box,
   click Go
5. Click **Select** for the remaining record
6. Review the displayed information to verify the Primary Record ('the keeper')
   - this most likely the one with the latest **Last update**
   Use the blue & grey arrows button to swap the Primary / Secondary record if required
7. Scroll to the bottom of the Secondary record and click **Merge**.
8. On the Primary Record, click Go to Client.
9. Review *Relationships* to ensure duplicates do not exist for these.
10. Review *Addresses* and *Contacts* – **End** any that are not current
11. Go to the **Alerts** tab and delete all *Duplicate Person Record* Alert records



   Click on the blue date to open the record 'Edit Alert Details' on the right-hand side of your screen. Click **Delete.**
   All Alert records must be deleted to remove the Alert icon (and the message which appears).

12. Job done !

For MULTIPLE Merge records

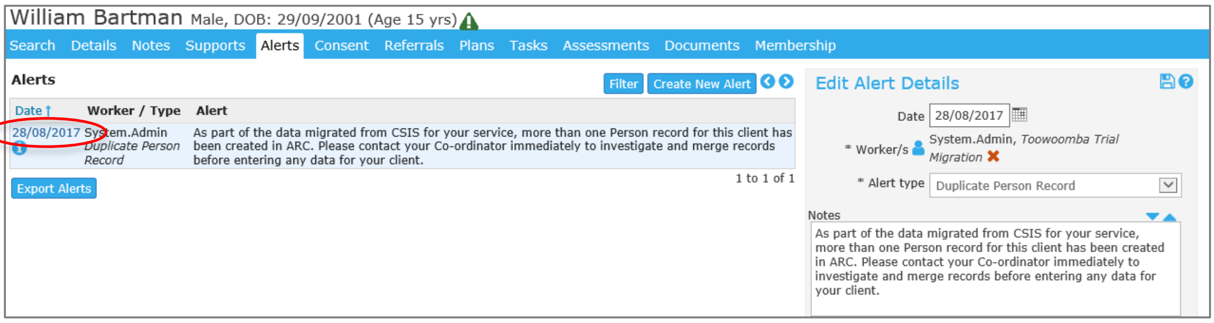
1. On **Person** page, use *Identifier* to access each Person record
2. From the **Details** tab, write down the Case Summary **Start** and **End** dates (incl. Start dates for any open Cases) recorded on each Person record
   A manual table to keep track of things is highly recommended:

Person Name	Person ID	Case start date	Case end date	Merge order
Ann Smith	23564	4.6.2017	13.6.2017 4.6.2017	2
		5.6.2017	5.12.2017	3
Anne Smith	23558	11.5.2016	20.11.2016	1
Anne Smith-Jones	32558	8.7.2018		4 – keeper.. Open case

3. Identify 'the keeper' (this will mostly be the one with the open Case Summary, or the most recent)
4. Using the dates, determine the correct sequence to merge the records.
   In the example above, Merge order : merge 1 into 2, then 2 into 3, then 3 into 4
5. If any Case Summary periods overlap, their Start / End dates will need to be modified for all Persons in the Case so that there are no overlapping time periods. (Case Creation / Case Closure date fields may also need to be amended.) Example highlighted in yellow above.
   To do this, use the red pencil to access each Person in the Case Summary, modify the Start / End Dates/s as required, complete *Comment* and **Save**.

6. On the ***Merge Persons*** subtab
7. In the **Search for primary record** box,
   enter *Given Name* * and *Family Name* * and check the Fuzzy box
8. Click **Select** for the record with the ID for the intermediate merge
9. In the **Search for secondary record** box,
   enter *Given Name* and *Family Name* and check the Fuzzy box
10. Click **Select** for the record with the ID for the oldest record
11. Review the displayed information to verify the Primary Record
    Use the blue & grey arrows button to swap the Primary / Secondary record if required
12. Scroll to the bottom of the Secondary record and click **Merge**.
13. Repeat steps 6 – 11 until all records are merged – leaving one Person record, the Primary record
14. On the Primary Record, click Go to Client.
15. Review *Relationships* to ensure duplicates do not exist for these.
16. Review *Addresses* and *Contacts* – **End** any that are not current

17. Go to the **Alerts** tab and delete all *Duplicate Person Record* Alert records



Click on the blue date to open the record 'Edit Alert Details' on the right-hand side of your screen. Click **Delete.**
All Alert records must be deleted to remove the Alert (and stop the message appearing).

18. Well done ! ☺
You can confirm that everything has been fixed by going to the **Persons** page and Search for the Person, *An%* - only one record will display.

10 Record Consent

The *Program Guidelines* for Aboriginal and Torres Strait Islander Family Wellbeing services outline the circumstances regarding consent and information sharing. It is acknowledged that managing confidentiality and privacy is primarily addressed through the policies and practices exercised by each service. The department requires funded services have their own consent and privacy statements, which they can upload to ARC.

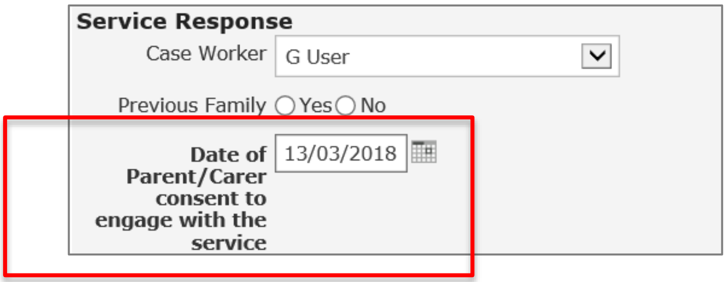
In ARC, Consent is captured in two places:

1. On the **Case Summary**, ***Referral*** sub-tab – ***Date of consent to engage with the service*** – this field is used for reporting purposes; and
2. In the **Consent** tab on the **Person** record. The use of this tab is as prescribed by your service.

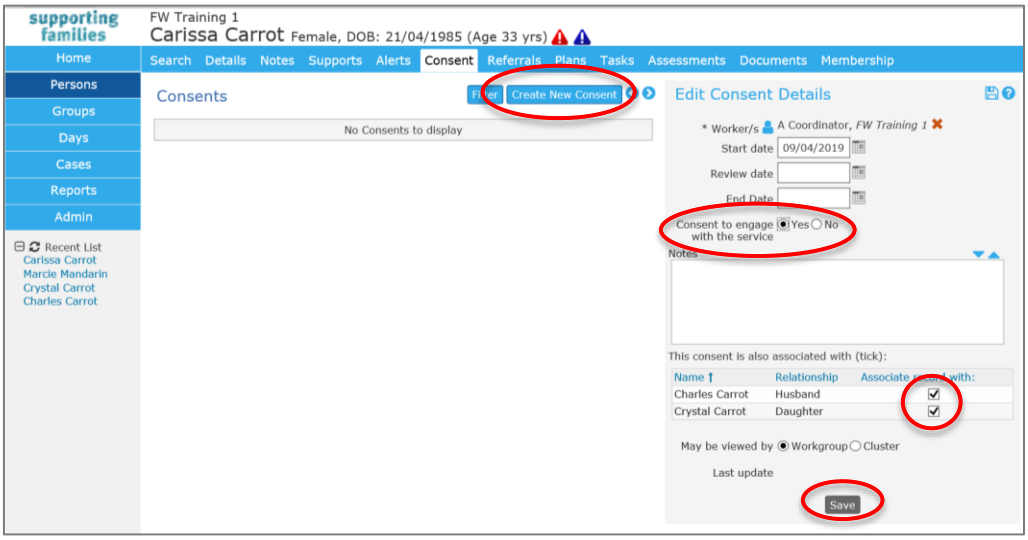
To record consent :

1.

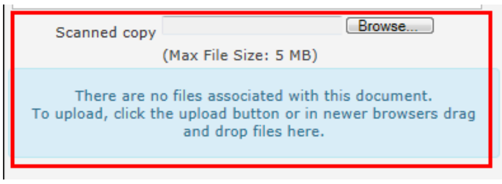
The **Date of Parent/Carer consent to engage with the service** <u>**must**</u> be recorded on the **Case Summary** – *Referrals* sub-tab.
This field is used for reporting purposes for your service.



2. <u>Then</u>, <u>**if**</u> required by the procedures defined by your service, the consent attached to the Person records may be updated, From the **Persons** page, select the **Consent** tab.
3. Select **Create New Consent**.
4. Enter **Start date** and **Review date** of consent (if applicable).
5. Enter consent provided by selecting **Yes** against **Consent to engage with the service.**
6. Enter any **Notes** applicable to the consent.
7. If the consent is associated with more than one family member, select the appropriate family members from the **This consent is also associated with** section
8. Select **Save.**



9. After the initial **Save**, an area on the form appears to enable you to upload the signed consent form by selecting Browse / **Select & Upload** button or drag and drop the file into the blue portion on the form.



Check the procedures for your service : it may be determined more efficient to save the consent from the family on the **Case Summary** as a central record, rather than on individual Person records.

10. Once the documents have been uploaded, select **Save**.

11. To close / **End Date** consent on a Person record, open the Edit Consent Details form, record an **End Date** and select **Save**.

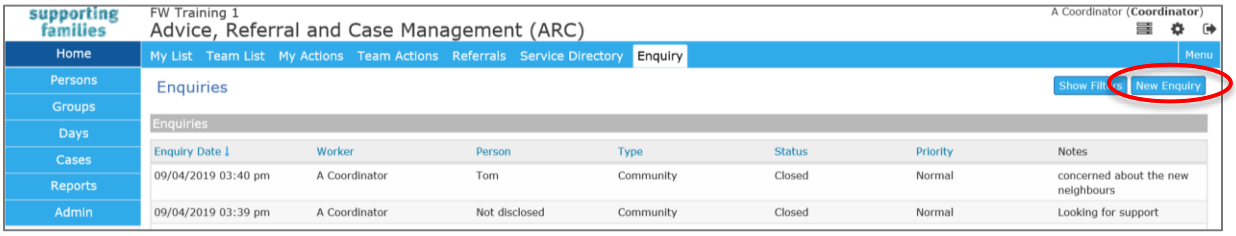
11 Enquiries

The **Enquiry** form is used to capture data including time spent relating to queries/enquiries received eg. telephone calls, emails or in-person interactions associated with the potential for providing support to vulnerable children and families. Time associated with these ad hoc casual enquiries and non-case activities can be captured using an Enquiry.

There are important fields which must be completed on this form in order to be reflected in the performance data for your service.

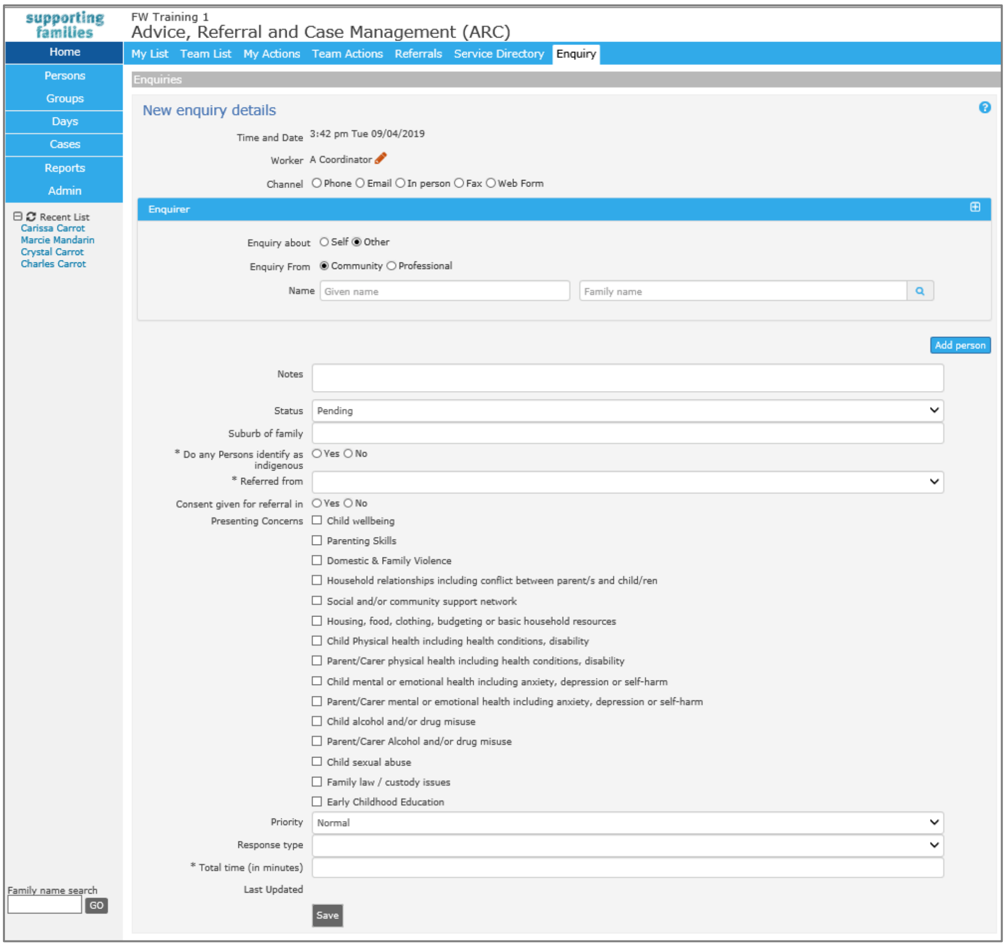
11.1 Create an Enquiry

1. From the **Home** Page, select the **Enquiry** tab. A list of enquiries recorded within the last 30 days displays.



2. To create a new enquiry, select **New Enquiry**.
   To modify an existing enquiry, simply click on that row from the list view.

   The fields marked with * are mandatory.



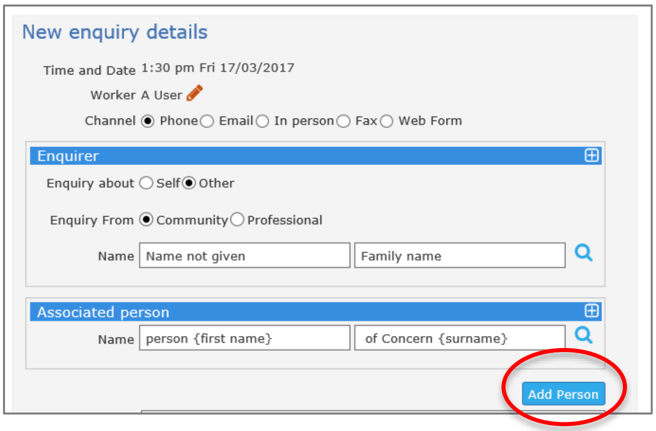
It is important to complete all fields accurately as many of these fields are included for reporting purposes.

3. Record how the enquiry was received by selecting a **Channel**

4. Enter details about the **Enquirer** – the person making the enquiry eg. member of community, principal, professional, self.

   Note: It is not mandatory to record a name.

5. To record the name of the Person /s of concern (whom the enquiry is about), select the **Add Person** button on the Enquiry screen. Record the name of the person/s whom the enquiry is about in the **Associated person** fields.
   Note : This functionality is limited and not recommended.



6. Enter the **Suburb** of the family

7. Select a value for **Do any Persons identify as indigenous? ***

8. Select a value from the **Referred from *** list

9. Record if consent has been provided for

10. The **Status:*** has 3 available options :

   - *Pending* (new Enquiry)
   - *Responding* (in progress, being actioned by someone in your service)
   - *Closed* (finalised/complete)

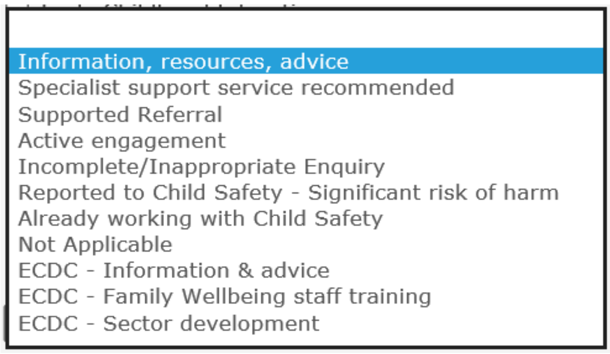
   It is recommended that CLOSED is selected – the Enquiry is a one-off form, not one that you come back to.

11. Add **Notes** about the enquiry

12. Indicate the **Presenting Concerns** (multi-select available)

13. Select the **Priority** (defaults to Normal) – this is used as prescribed by your service.

14. Select the **Response type *** from the list



Information, referral and advice	where information or advice was provided to assist the enquirer respond to the situation / address their enquiry
Specialist support service recommended	where the worker recommends the family be referred to a specific support service based on the circumstances of the enquiry
Supported Referral	where the enquirer has an existing relationship with the family and is best placed to lead the family's engagement with a specific service and the enquirer will benefit from the worker's support to achieve this
Active engagement	where the particulars of the enquiry identify that the referral criteria for your service is met and you progress to open a Case Summary to work with the family – as outlined Section 2 of the Family Wellbeing Program Guidelines

The **ECDC** values are only for use by the Early Childhood Development Coordinator within your service.

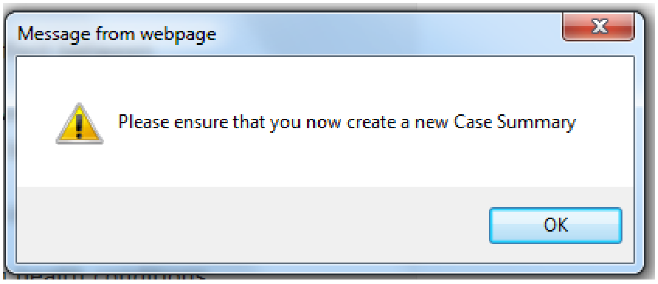
These values are used to record time spent on the following activities :
- Providing ad hoc / one-off information and advice
- Working with the Family Wellbeing staff to strengthen their early childhood development skills and knowledge
- Engaging with other organisations providing early childhood development services.

Response type is mandatory * when the **Status** is set to *Closed*.

15. Record time spent on enquiry in the **Total time (in minutes)** * field.
16. Select **Save.**

Note: ❑ When a Response Type of *3 – Supported Referral* or *4 – Active engagement* is selected, the *Status* must be **Closed** in order to save the enquiry.

❑ When an Enquiry is Closed with a Response Type of *3 – Supported Referral* or *4 – Active engagement*, the following prompt will appear :

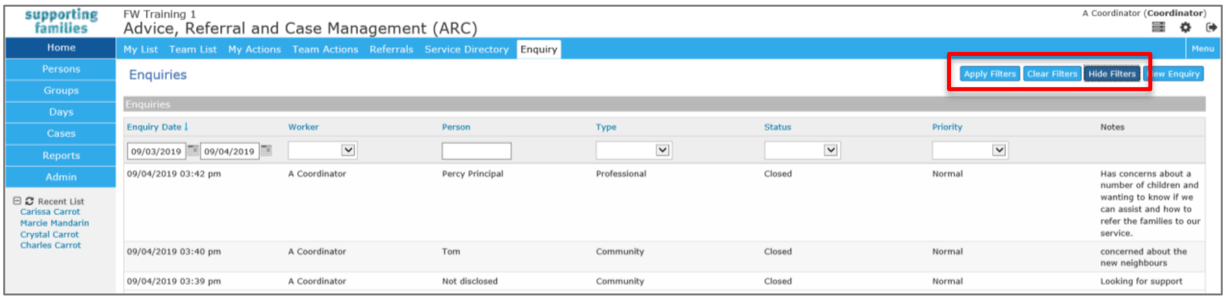


To cancel an Enquiry before it is saved, simply click on the **Enquiry** tab at the top of the page.

11.2 Using the Enquiry List

1. From the **Home** Page, select the **Enquiry** tab. A list of enquiries recorded <u>with the last 30 days</u> displays. Each of the columns can be used to sort displayed data – evidenced by the blue arrow.

2. Select the **Show Filters** button to define the required parameters (ie. date, Status, Worker etc) for the enquiries you wish to display.



Use the **Apply Filters**, **Clear Filters** and **Hide Filters** buttons to change your searches and to return to the default view.

12 For your Early Childhood Development Coordinator

Some Family Wellbeing services have been funded to engage Early Childhood Development Coordinators (ECDC) to improve the engagement of Aboriginal and Torres Strait Islander families with the early childhood education and care system.

The work undertaken by this role will include :

- Working with families to promote the importance of their children's early learning for making a successful transition to formal education,
- Enhancing the skills and knowledge of Family Wellbeing workers to address early learning needs,
- Engaging directly with families to assist them with access to early learning services, and
- Fostering strong relationships with early childhood education providers within your area.

There are ***3 specific features*** in ARC to capture these activities:

1. The Enquiry form
2. The ECDC Profile
3. Notes.

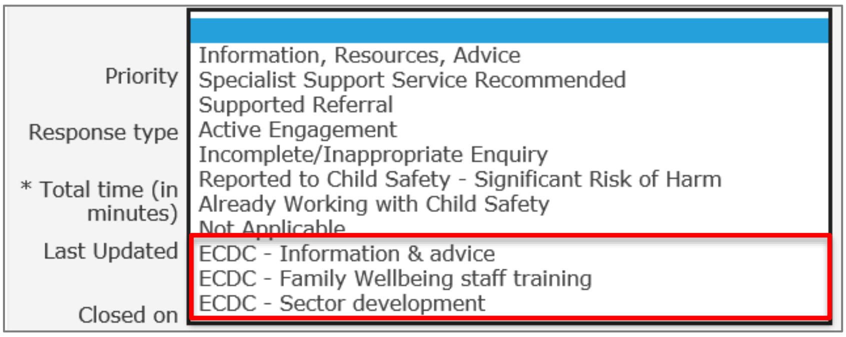
12.1 The Enquiry form

To record time spent by the Early Childhood Development Coordinator in :

- Providing ad hoc / one-off information and advice
- Working with the Family Wellbeing staff to strengthen their early childhood development skills and knowledge
- Engaging with other organisations providing early childhood development services,

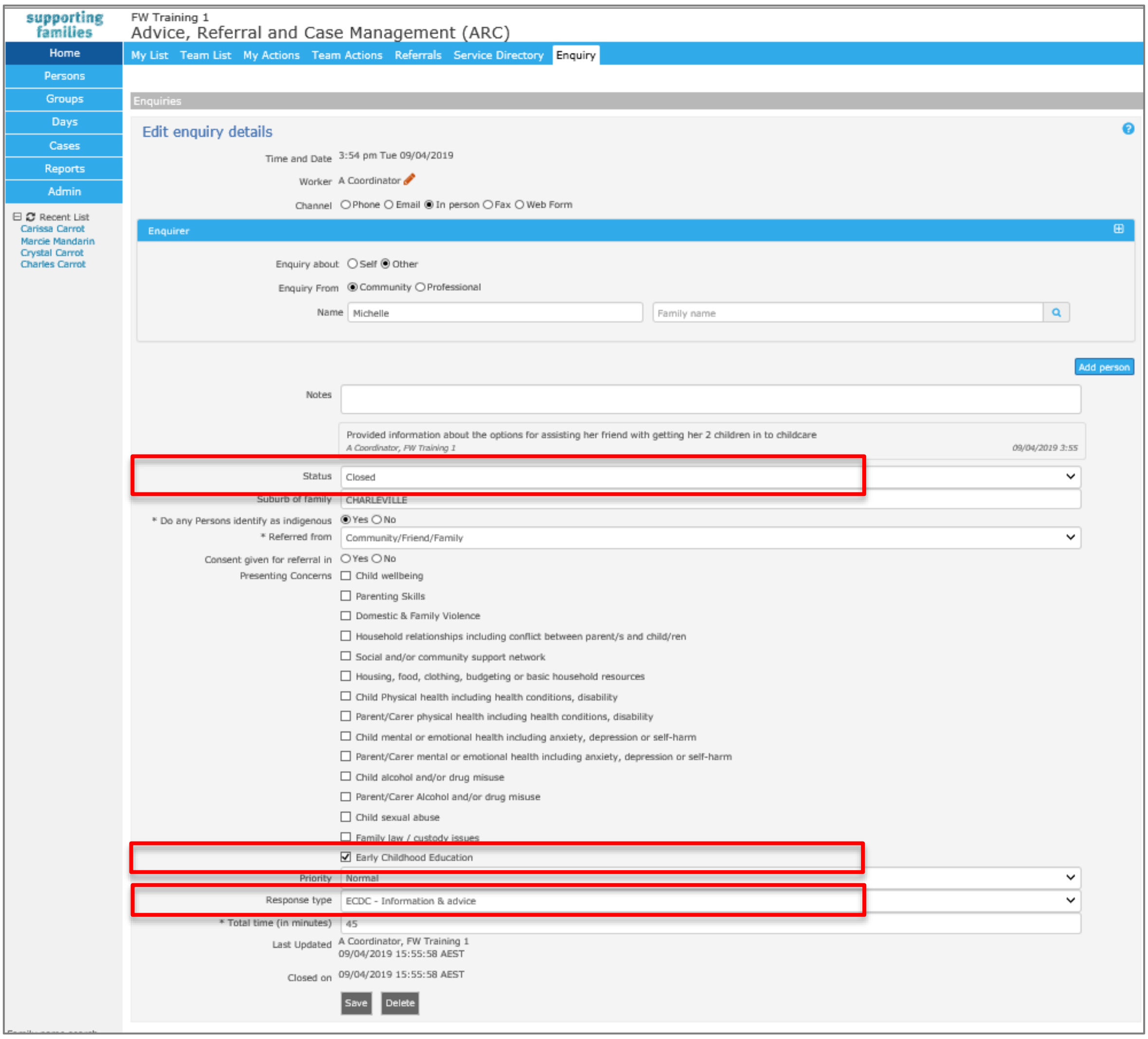
use the **Enquiry** form on the **Home** page. Refer to the Create an Enquiry for guidance in using this form.

Simply select the relevant ***Response Type*** for the activity :



… / 2

A completed example of the **Enquiry** record is shown below.



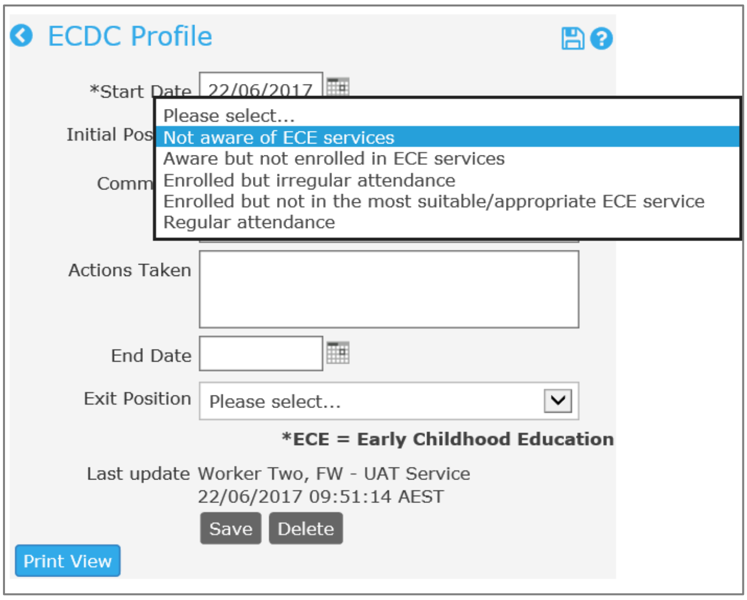
12.2 The ECDC Profile

An **ECDC Profile** is only to be used by the Early Childhood Development Coordinator in your service.

An **ECDC Profile** is to be created for each child, where the Early Childhood Development Coordinator engages with the family to provide services and support over a period of time (ie. not one-off information and advice).

1. On the **Person** record, **Details** tab, select Create new profile, then *Profile type* - ECDC Profile

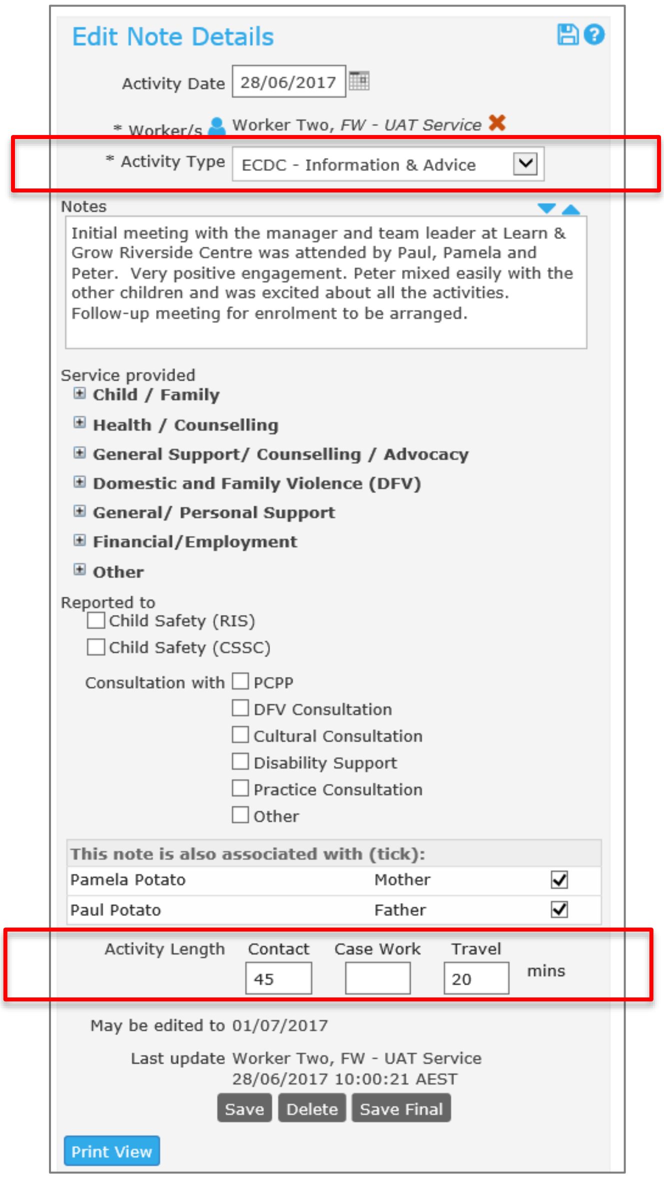
2. This will reflect :
   - the position of the child upon commencement,
   - the activities undertaken and services provided, and
   - their position upon completion of the ECDC's engagement with the family.



The accurate completion of this record by the Early Childhood Development Coordinator is important for ensuring accurate reporting.

12.3 Using Notes

Time spent by the Early Childhood Development Coordinator in working with the family to promote the child's position (as reflected in an **ECDC Profile**) must be captured in a **Note** using the specific ***Activity Type*** value of *ECDC – Information & Advice*.



12.4 ECDC Reporting

ECDC activities have been incorporated in both the ***ARC Performance Report*** (and List) and the ***OASIS Report*** (and List).

In the ***ARC Performance Report***, Table 2 :

2. ECDC Service hours recorded (A01.2.02, A01.1.06)			
	Contact	Case Work	Travel
	hours	hours	hours
ECDC - Information & advice (Notes)	0.8	0.8	0
ECDC - Information & advice (Enquiries)	0.4	0	0
ECDC - Family Wellbeing staff training (Enquiries)	0	0	0
ECDC - Sector development (Enquiries)	0.5	0	0
Total (rounded up to the closest 5 minute block)	1.7	0.8	0

The details of the individual records included in the *ARC Performance Report* are displayed in section 2 in the ***ARC Performance List*** :

2. ECDC Service hours recorded (A01.2.02, A01.1.06)

ECDC - Information & advice (Notes)

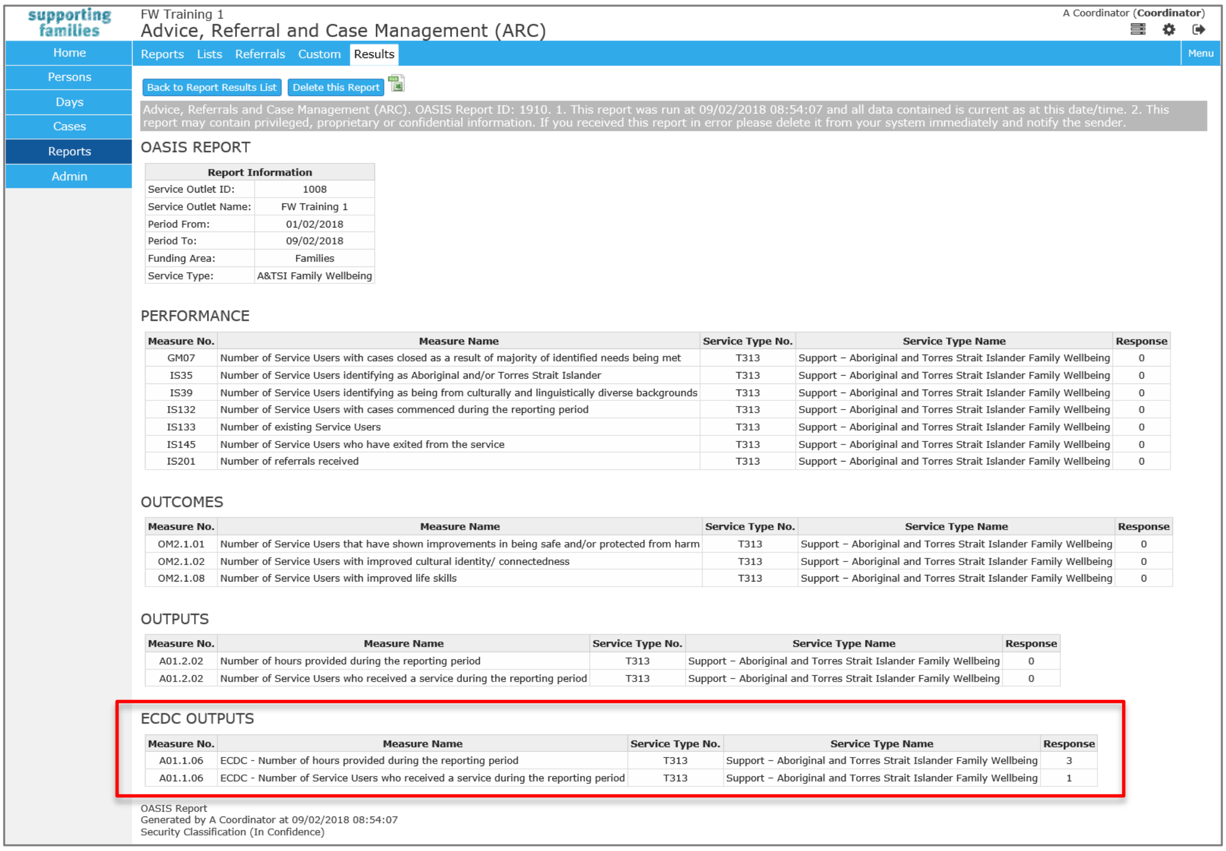
CASE	Status	ATSI	Referred From (Source)	Referral in	Case Creation Date	DOCTEWTS	Closure date	Reason for closure	Note ID	Associated with	Note Date	Contact type	Contact time	Casework time	Travel time	Worker
									734	Peter Potato (3368), Paul Potato (3370), Pamela Potato (3369)	09/02/2018	ECDC - Information & advice	45	0	0	A Coordinator
									735	Peter Potato (3368), Paul Potato (3370), Pamela Potato (3369)	09/02/2018	ECDC - Information & advice	0	45	0	A Coordinator

ECDC Services provided (Enquiries created within the report period)

Enquiry date	Person(s)	Status	ATSI	Enquiry from (Source)	Response type	Time	Worker
09/02/2018	Mary	Closed	Yes	Other - Non-Government	ECDC - Information & advice	25	A Coordinator
09/02/2018	Beverley	Closed	Yes	Education - State School	ECDC - Sector development	30	A Coordinator

In the ***OASIS Report***, your ECDC contract measures are specifically included - refer screenshot on following page.

The particular details are available in the OASIS List – refer following page.



supporting families

FW Training 1

Advice, Referral and Case Management (ARC)

A Coordinator (**Coordinator**)

Home | Persons | Days | Cases | Reports | Admin

Reports Lists Referrals Custom Results Menu

Back to Report Results List | Delete this Report

Advice, Referrals and Case Management (ARC). OASIS Report ID: 1910. 1. This report was run at 09/02/2018 08:54:07 and all data contained is current as at this date/time. 2. This report may contain privileged, proprietary or confidential information. If you received this report in error please delete it from your system immediately and notify the sender.

OASIS REPORT

Report Information	
Service Outlet ID:	1008
Service Outlet Name:	FW Training 1
Period From:	01/02/2018
Period To:	09/02/2018
Funding Area:	Families
Service Type:	A&TSI Family Wellbeing

PERFORMANCE

Measure No.	Measure Name	Service Type No.	Service Type Name	Response
GM07	Number of Service Users with cases closed as a result of majority of identified needs being met	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
IS35	Number of Service Users identifying as Aboriginal and/or Torres Strait Islander	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
IS39	Number of Service Users identifying as being from culturally and linguistically diverse backgrounds	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
IS132	Number of Service Users with cases commenced during the reporting period	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
IS133	Number of existing Service Users	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
IS145	Number of Service Users who have exited from the service	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
IS201	Number of referrals received	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0

OUTCOMES

Measure No.	Measure Name	Service Type No.	Service Type Name	Response
OM2.1.01	Number of Service Users that have shown improvements in being safe and/or protected from harm	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
OM2.1.02	Number of Service Users with improved cultural identity/ connectedness	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
OM2.1.08	Number of Service Users with improved life skills	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0

OUTPUTS

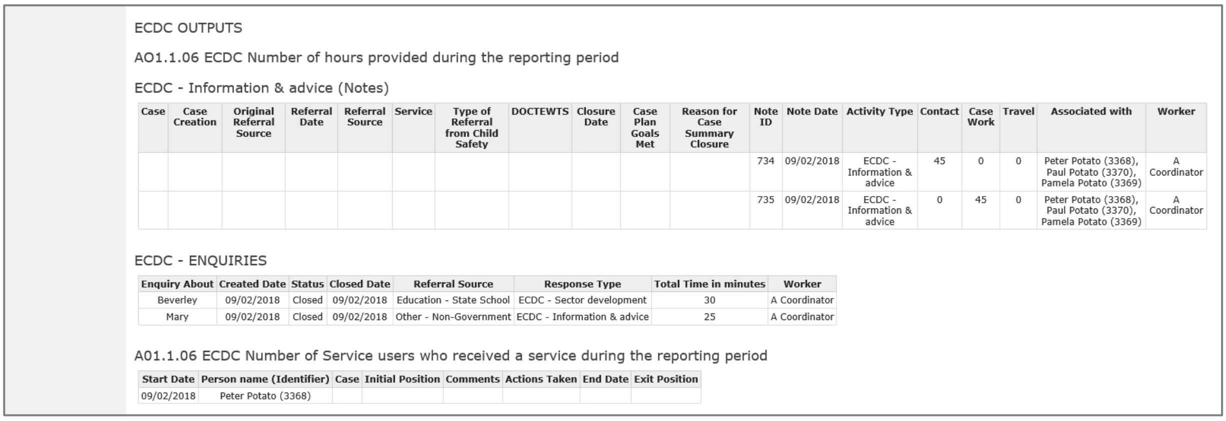
Measure No.	Measure Name	Service Type No.	Service Type Name	Response
A01.2.02	Number of hours provided during the reporting period	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0
A01.2.02	Number of Service Users who received a service during the reporting period	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	0

ECDC OUTPUTS

Measure No.	Measure Name	Service Type No.	Service Type Name	Response
A01.1.06	ECDC - Number of hours provided during the reporting period	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	3
A01.1.06	ECDC - Number of Service Users who received a service during the reporting period	T313	Support – Aboriginal and Torres Strait Islander Family Wellbeing	1

OASIS Report
Generated by A Coordinator at 09/02/2018 08:54:07
Security Classification (In Confidence)

The details of the individual records included in the OASIS Report are displayed in the ***OASIS List*** :



ECDC OUTPUTS

AO1.1.06 ECDC Number of hours provided during the reporting period

ECDC - Information & advice (Notes)

Case	Case Creation	Original Referral Source	Referral Date	Referral Source	Service	Type of Referral from Child Safety	DOCTEWTS	Closure Date	Case Plan Goals Met	Reason for Case Summary Closure	Note ID	Note Date	Activity Type	Contact	Case Work	Travel	Associated with	Worker
											734	09/02/2018	ECDC - Information & advice	45	0	0	Peter Potato (3368), Paul Potato (3370), Pamela Potato (3369)	A Coordinator
											735	09/02/2018	ECDC - Information & advice	0	45	0	Peter Potato (3368), Paul Potato (3370), Pamela Potato (3369)	A Coordinator

ECDC - ENQUIRIES

Enquiry About	Created Date	Status	Closed Date	Referral Source	Response Type	Total Time in minutes	Worker
Beverley	09/02/2018	Closed	09/02/2018	Education - State School	ECDC - Sector development	30	A Coordinator
Mary	09/02/2018	Closed	09/02/2018	Other - Non-Government	ECDC - Information & advice	25	A Coordinator

A01.1.06 ECDC Number of Service users who received a service during the reporting period

Start Date	Person name (Identifier)	Case	Initial Position	Comments	Actions Taken	End Date	Exit Position
09/02/2018	Peter Potato (3368)						

13 Managing Referrals

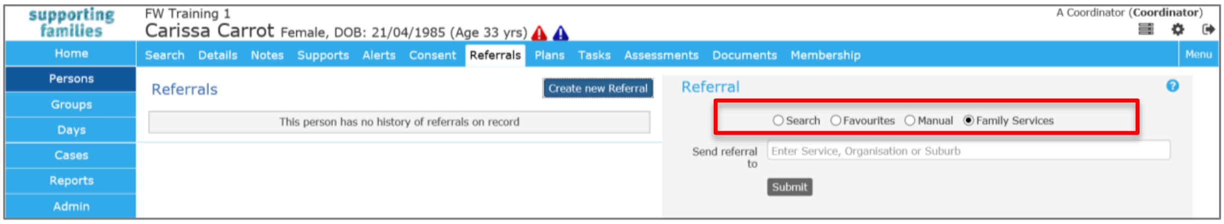
This section outlines the important functionality for :

- making referrals **to** another service – section 12.1 below and
- **receiving** referrals – section 12.2 below.

13.1 Making Referrals to other services

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

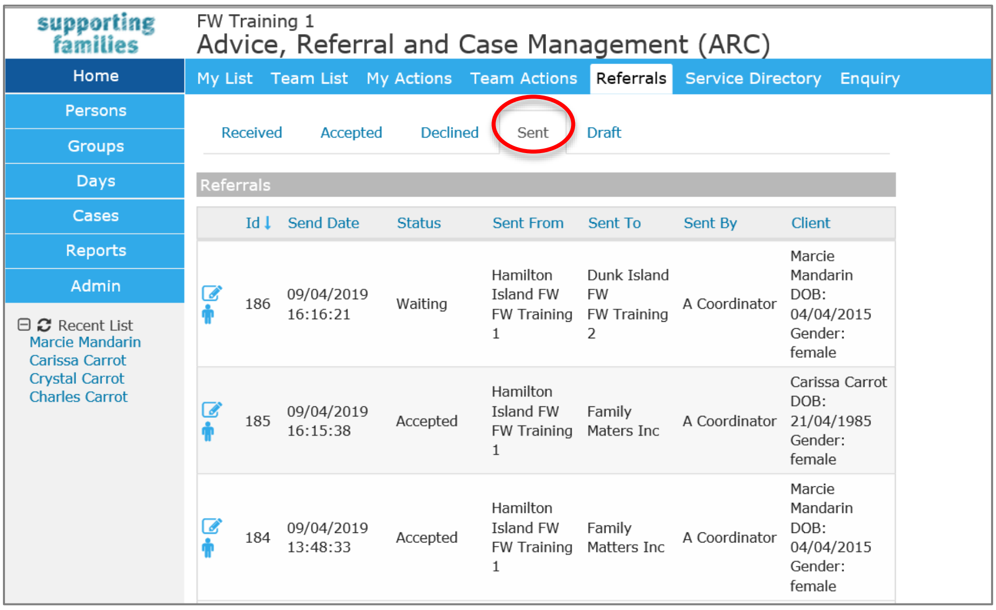
Click the **Create new Referral** button to open the Referral form.



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

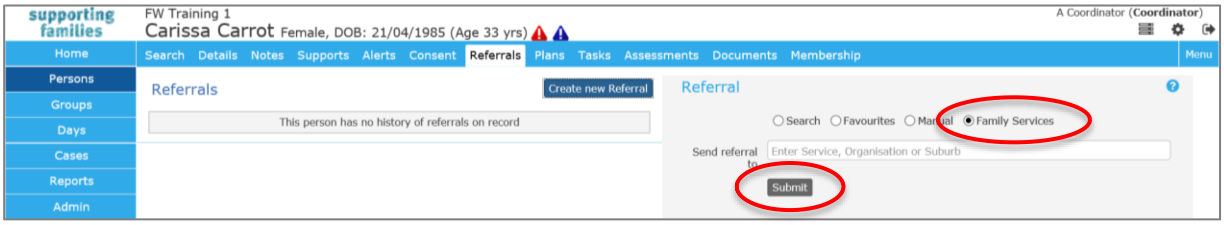
- **Send a Referral to another service within ARC - Family Services**: This sends a referral to another service provider using ARC : Family and Child Connect, Intensive Family Support and Aboriginal and Torres Strait Islander Family Wellbeing services. The referral form is set to this option as the default.
- **Record a Referral - Manual**: This records referrals to external providers - services not using ARC and that are not in the Service Seeker database.
  - **IMPORTANT NOTE**: The actual notification and documentation for the referral must be sent via channels external to ARC.

The status of **all** Referrals sent by your service are shown on the **Home** Page, **Referrals** tab, on the **Sent** sub-tab :

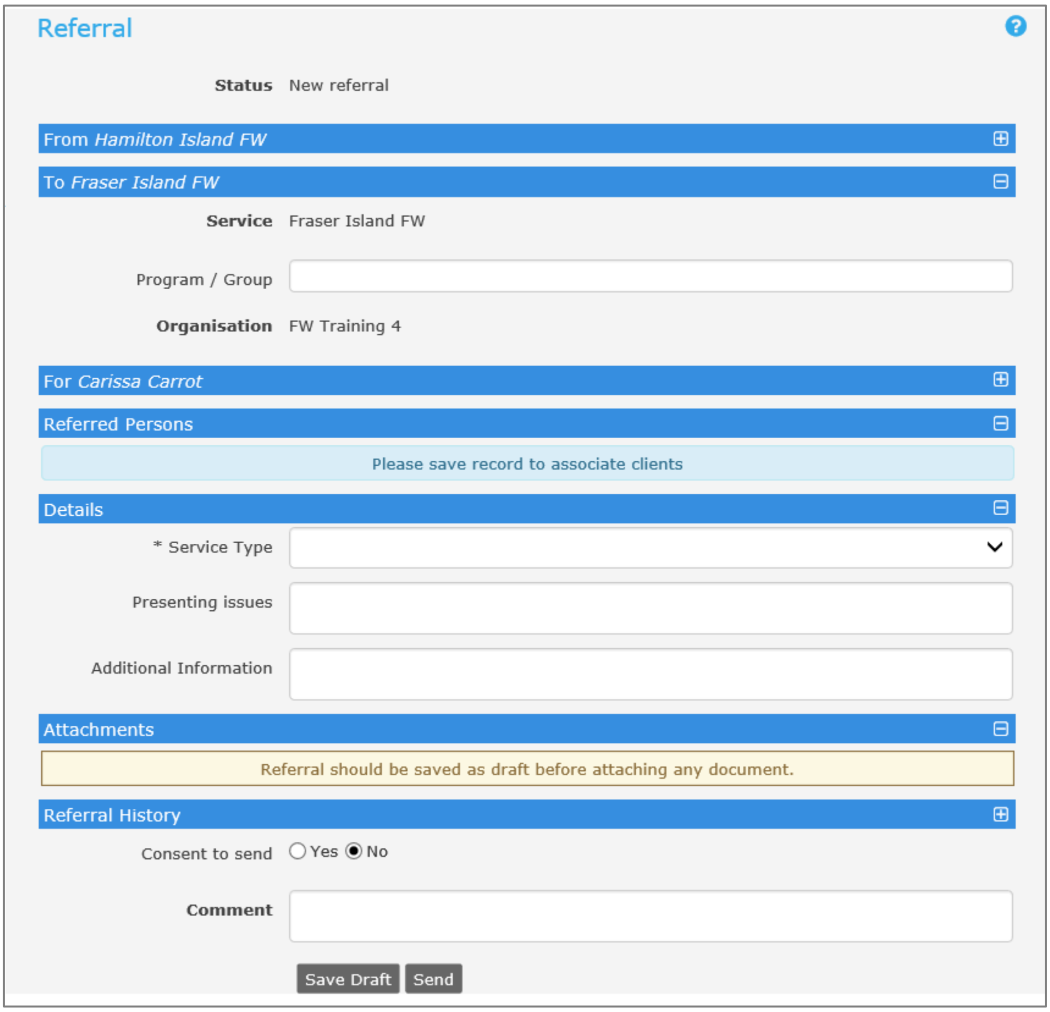


13.1.1 Send a Referral to another service within ARC - Family Services

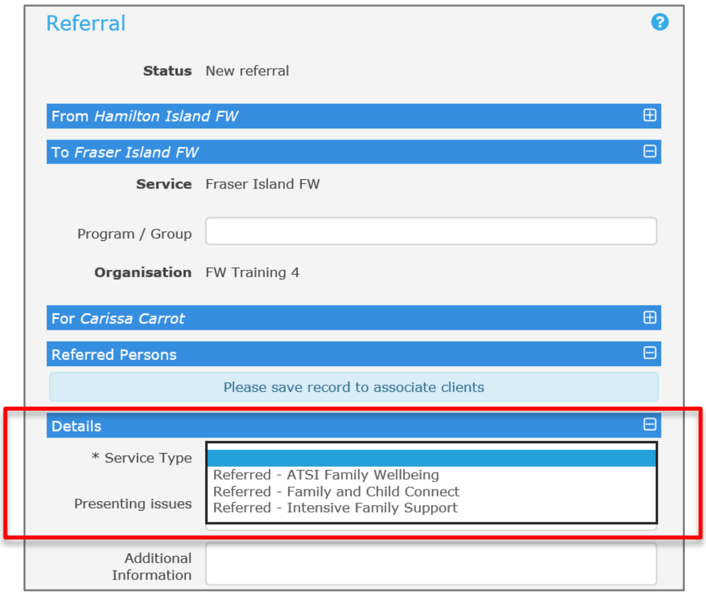
1. On the **Persons** page, **Referrals** tab, click **Create new Referral**.
2. You will notice the Referral type of **Family Services** is already selected**.**
3. Enter the first few letters to bring up the list of services within ARC.
4. Select the required service from the dropdown list which appears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



The Referral form appears.

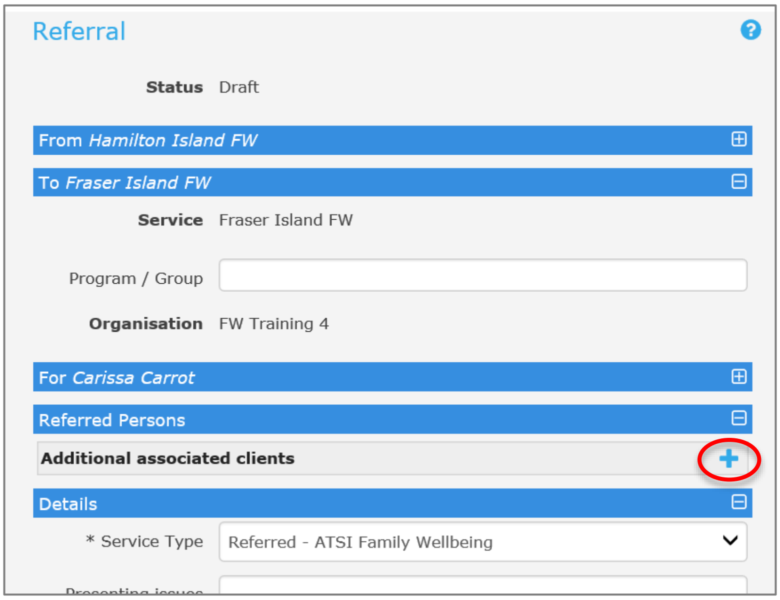


6. Select **Service Type** *.
Service Type is required for departmental reporting. The Referral will not save if this field has not been completed.

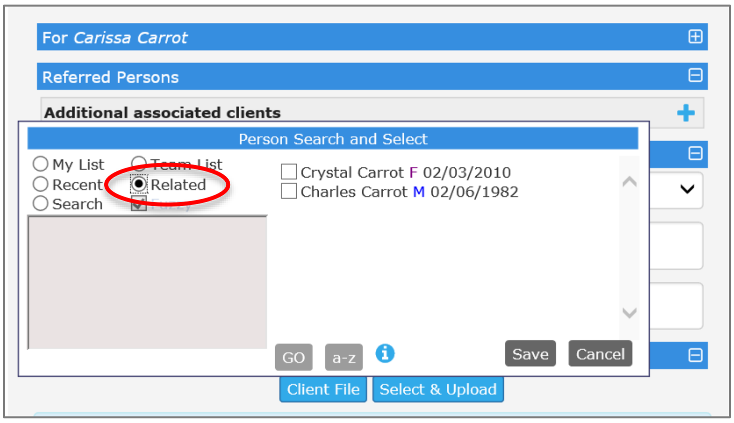


7. Click **Save Draft** at the bottom of the form.

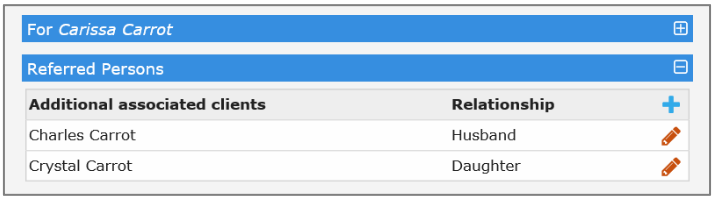
8. To add **Referred Persons**, click on the  icon to attach the other Persons in the Case (to the referral).



9. 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**.
The selected Persons are now included in the referral.

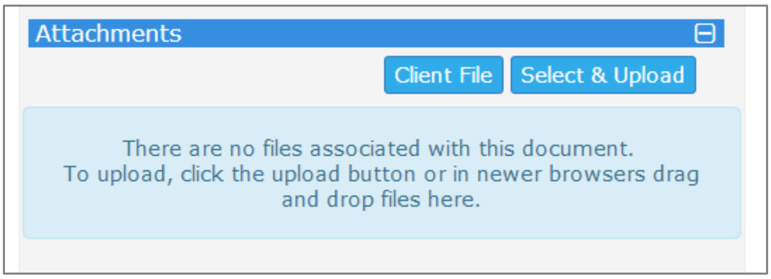


10. Enter in **Presenting Issues** and **Additional Information** if required.

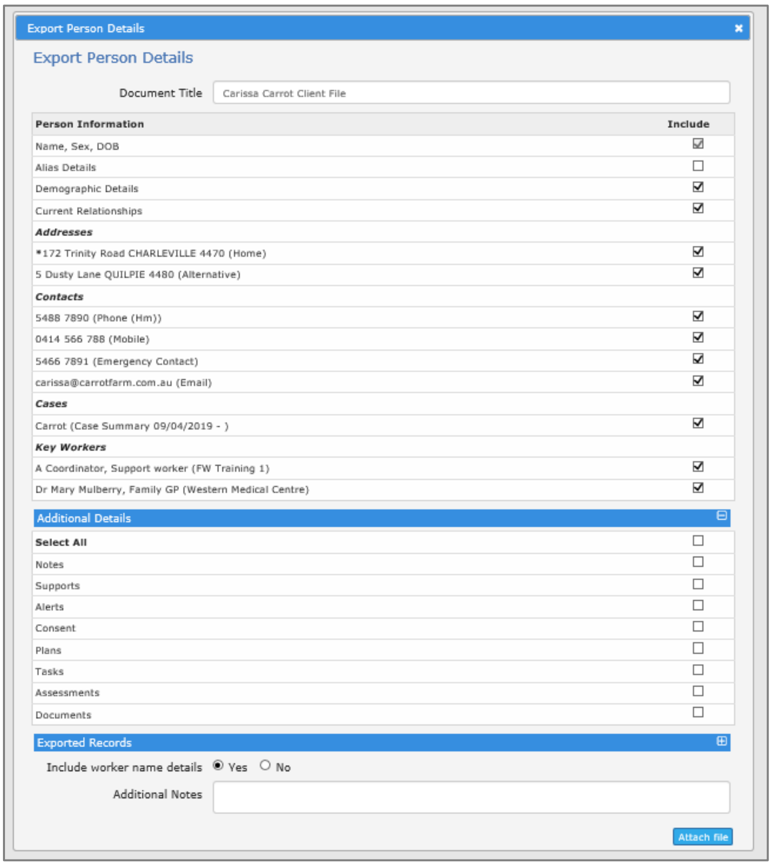
11. Enter any **Comments** and click **Save Draft.**

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.

12. The **Client File** must be attached to the referral, to promote efficient sharing of information.

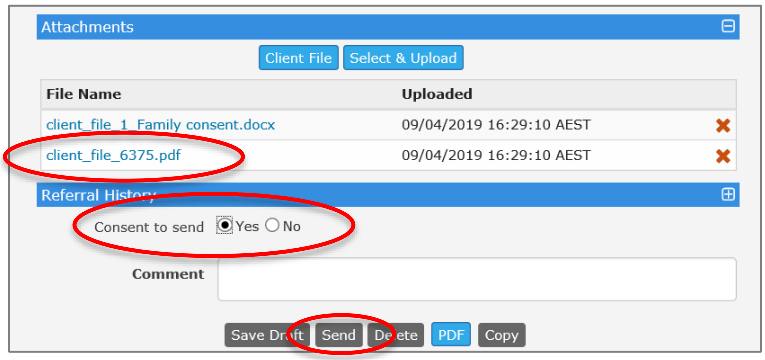


13. Select **Client File** then select the information you wish to attach to the referral. The current Case Summary information is a mandatory inclusion. Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes** and select **Attach file.**



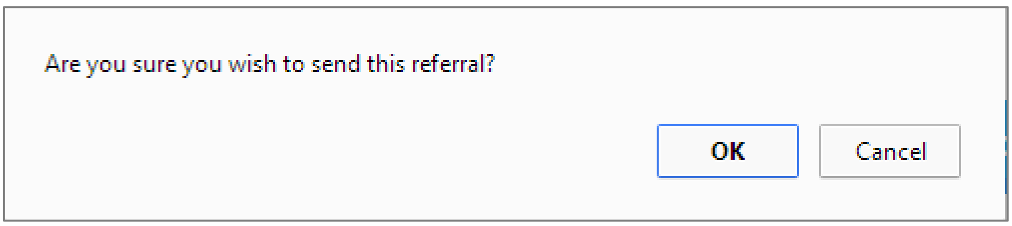
This file is now shown on the Referral form in the Attachments segment, as a pdf document.

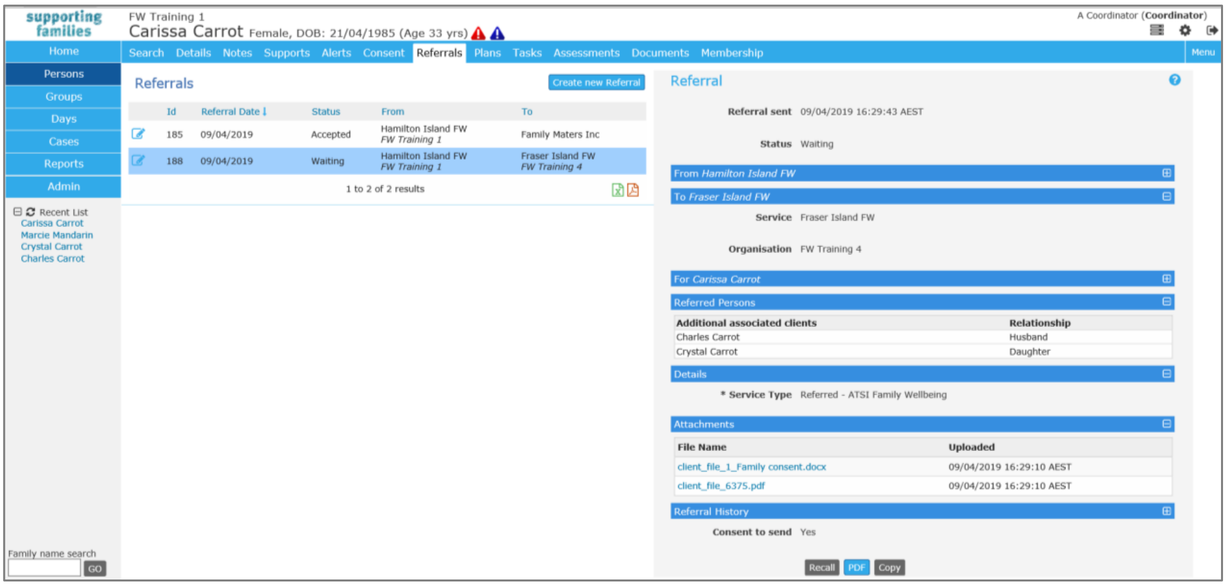
Any documents attached to the Case Summary will also be automatically included in the referral. You can choose which documents to send with the referral by clicking the red cross to remove them from the referral.



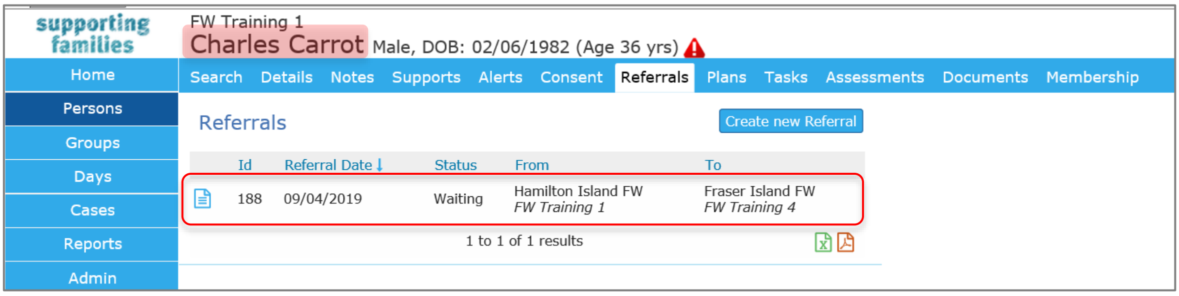
14. Check **Consent to send*** has been provided and click *Yes*.

15. 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**.



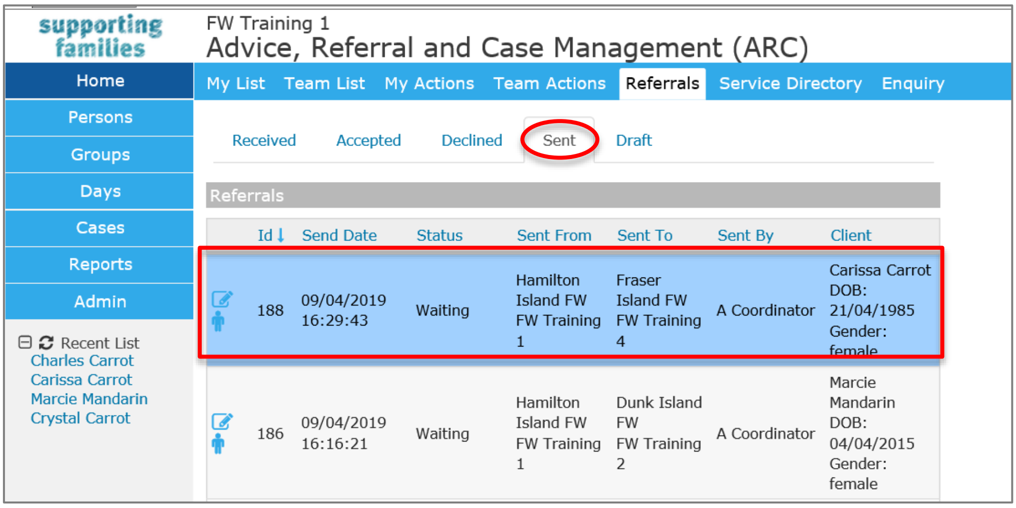


The referral will show on the **Person** page, **Referral** tab <u>for every Person in the referral</u>



………**AND**

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



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

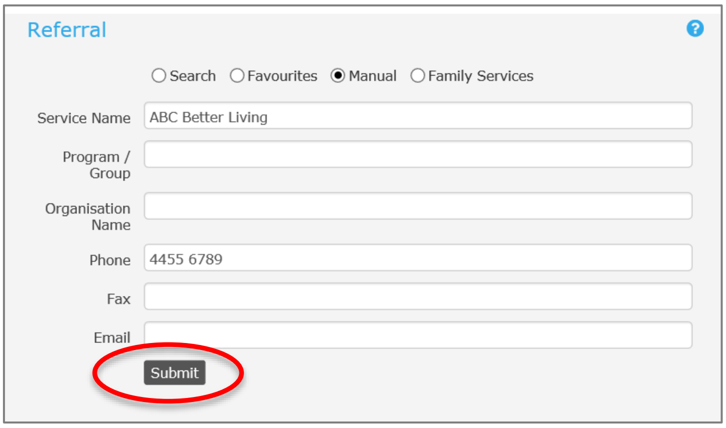
16. If the Referral needs to be recalled, open the Referral by clicking the blue pencil icon and click the **Recall** button in the bottom left of the form. This will only function while the Status is *Waiting*.

13.1.2 Record a Manual Referral

Manual referrals are used to **record** referrals made to services <u>not</u> using ARC or for services that are not listed in the Service Seeker database.

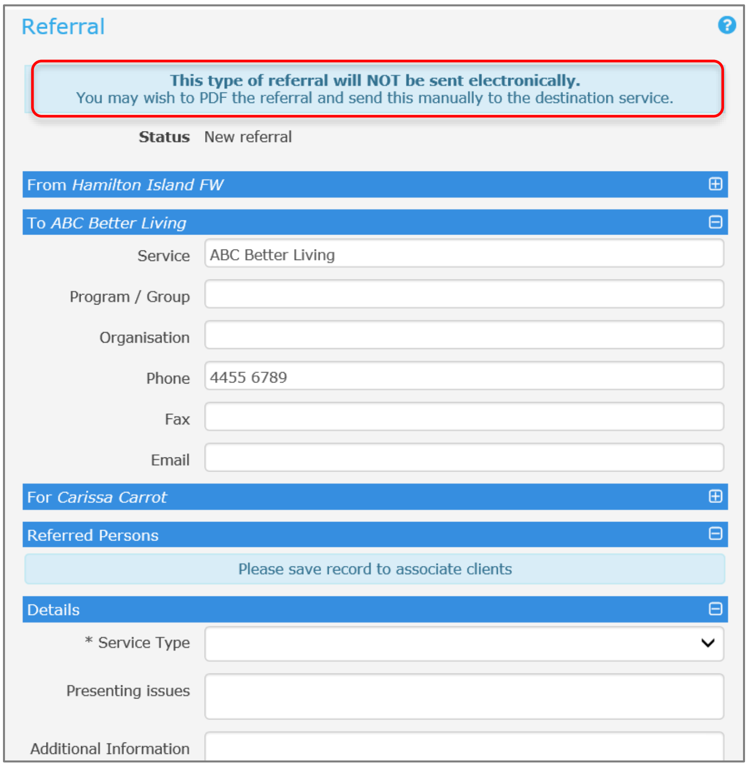
<u>IMPORTANT NOTE</u> : Notification of the referral and associated documents **must be sent separately via channels (eg. email, post, fax) external to ARC.**

1. On the **Persons** page, **Referrals** tab, click **Create new Referral**.
2. Select Referral type of **Manual.**
3. Enter in Referral to details such as Organisation name and phone number
4. Select **Submit.**

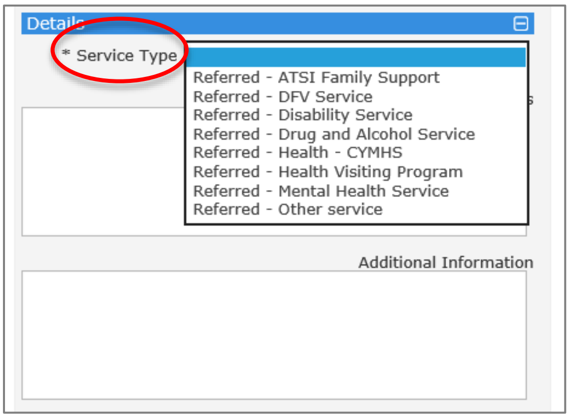


The Referral form will appear.

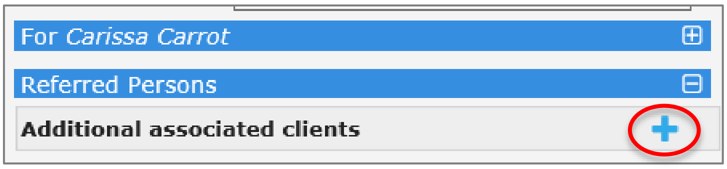
Note the reminder message in the light blue box at the top of the form – the actual referral notification and documentation must be sent to the receiving service via channels external to ARC.



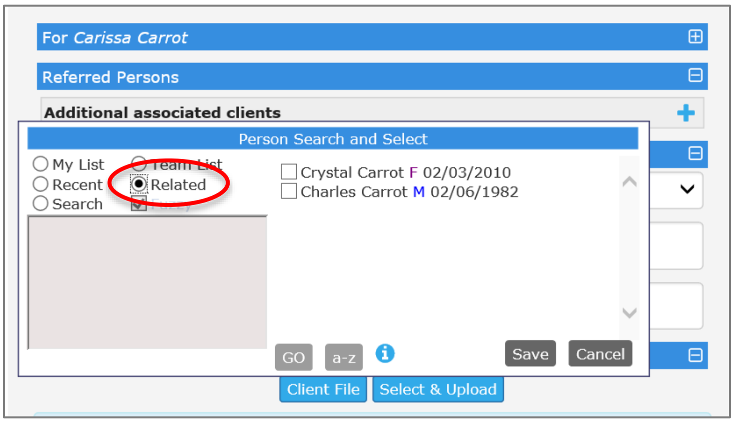
5. Select **Service Type***, then click **Save Draft**.
A validation message will appear if you attempt to save the Referral without selecting the relevant **Service Type**. **Service Type** is required for departmental reporting

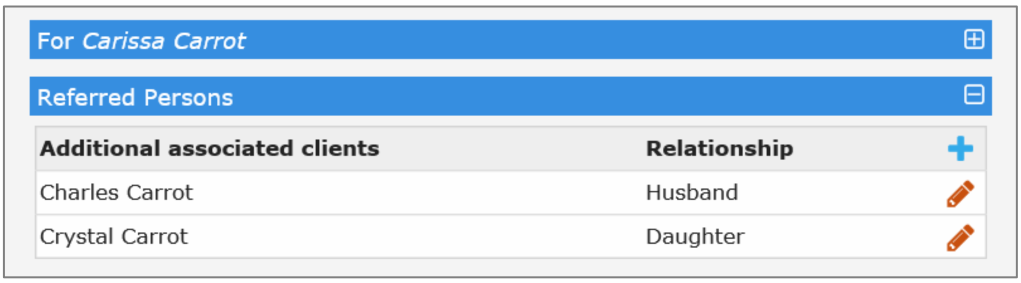


6. To include other Persons in the referral, click on the  icon.



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



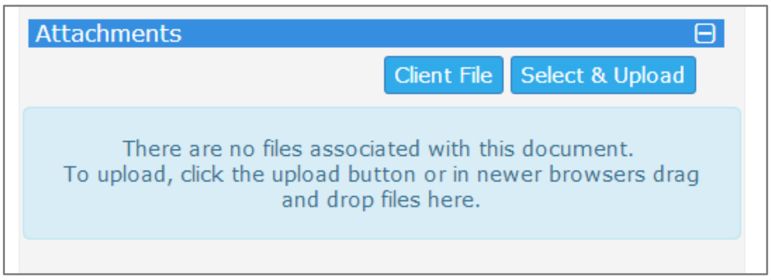


8. Enter in **Presenting Issues** and **Additional Information** if required.

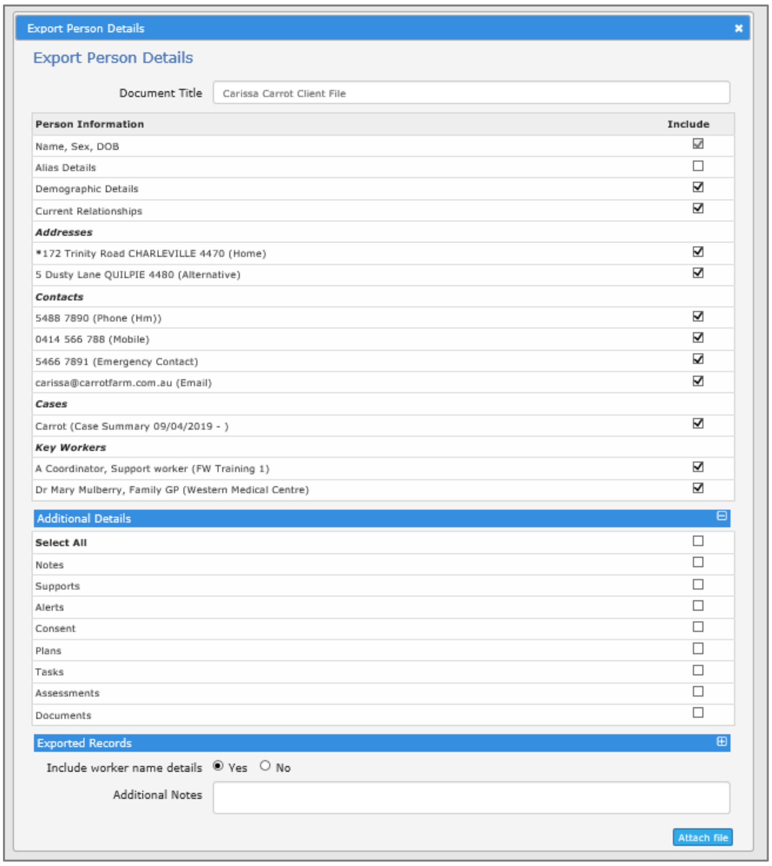
9. Enter any **Comments** and select **Save Draft.**

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

10. 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)

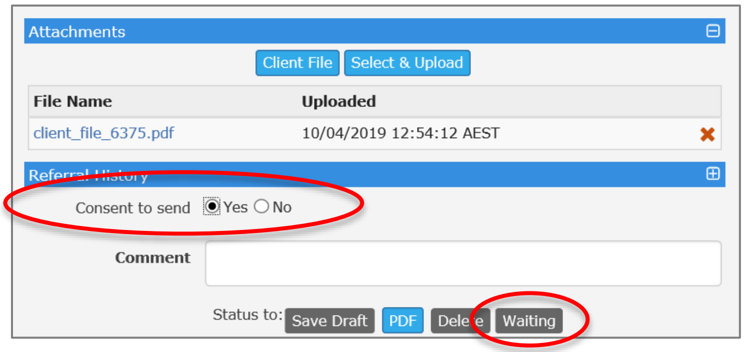


11. Select **Client File** then select the information you wish to attach to the referral. The Case Summary information is a mandatory inclusion. Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes** 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 choose which documents to send with the referral by clicking the red cross to remove them from the referral.

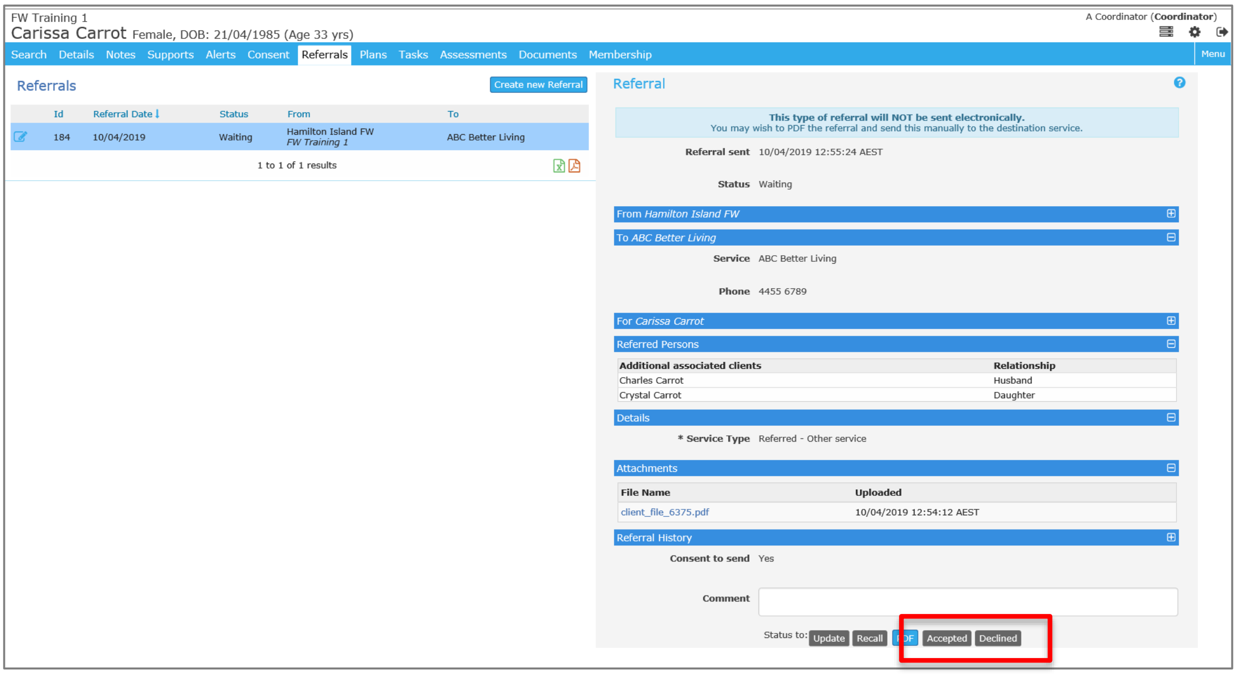


12. Check **Consent to send*** has been provided.

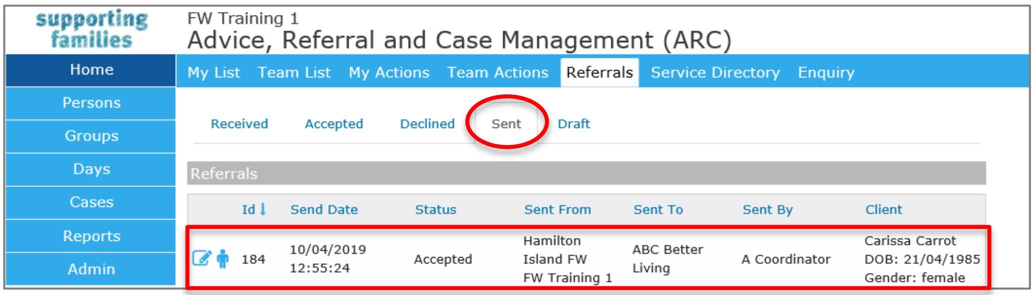
13. Click **Waiting.**

Note: A **PDF** copy of the referral **must** be generated and either emailed or printed/faxed to the receiving service.

14. 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**.



The Sent referral will show on the **Person** page, **Referral** tab (as above) for every Person in the referral AND on the **Home** Page, **Referrals** tab, **Sent** sub-tab.

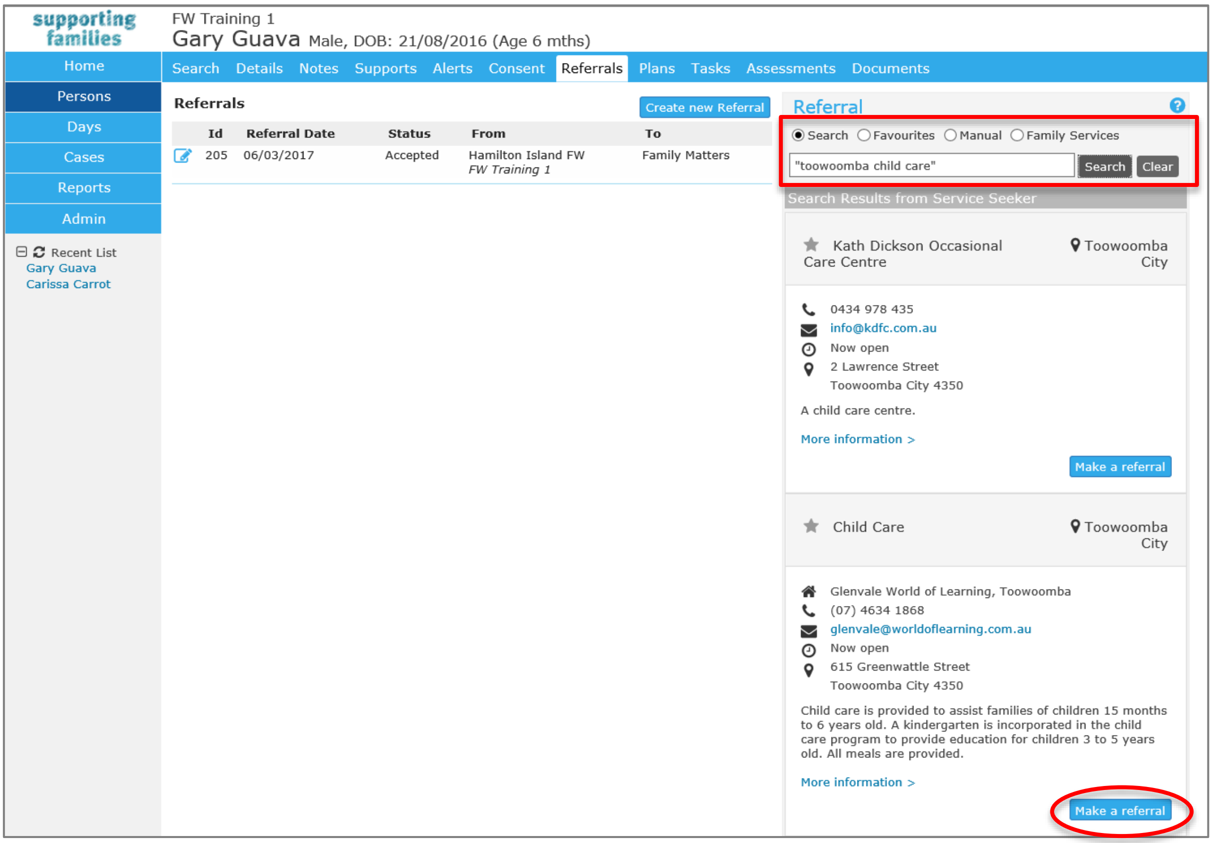

supporting families
FW Training 1
Advice, Referral and Case Management (ARC)
Home
Persons
Groups
Days
Cases
Reports
Admin
My List
Team List
My Actions
Team Actions
Referrals
Service Directory
Enquiry
Received
Accepted
Declined
Sent
Draft
Referrals
Id
Send Date
Status
Sent From
Sent To
Sent By
Client
184
10/04/2019 12:55:24
Accepted
Hamilton Island FW FW Training 1
ABC Better Living
A Coordinator
Carissa Carrot DOB: 21/04/1985 Gender: female

13.1.3 Record a Referral to a service listed in the Service Seeker database

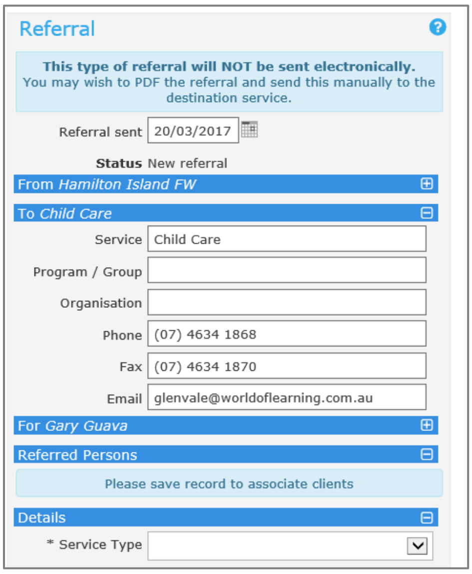
IMPORTANT NOTE : The actual notification and documentation **must be sent separately via channels (eg. email, post, fax) external to ARC.**

1. On **Persons** page, **Referrals** tab, click **Create new Referral**.
2. Select the **Search** radio button and in the search field, start typing the Service Name, Organisation Name or Suburb into the text field.

   Note: If you search via suburb, type as “Suburb”, click **Search.**
3. Select Appropriate Service from the List and select **Make a referral.**



The Referral form will appear.



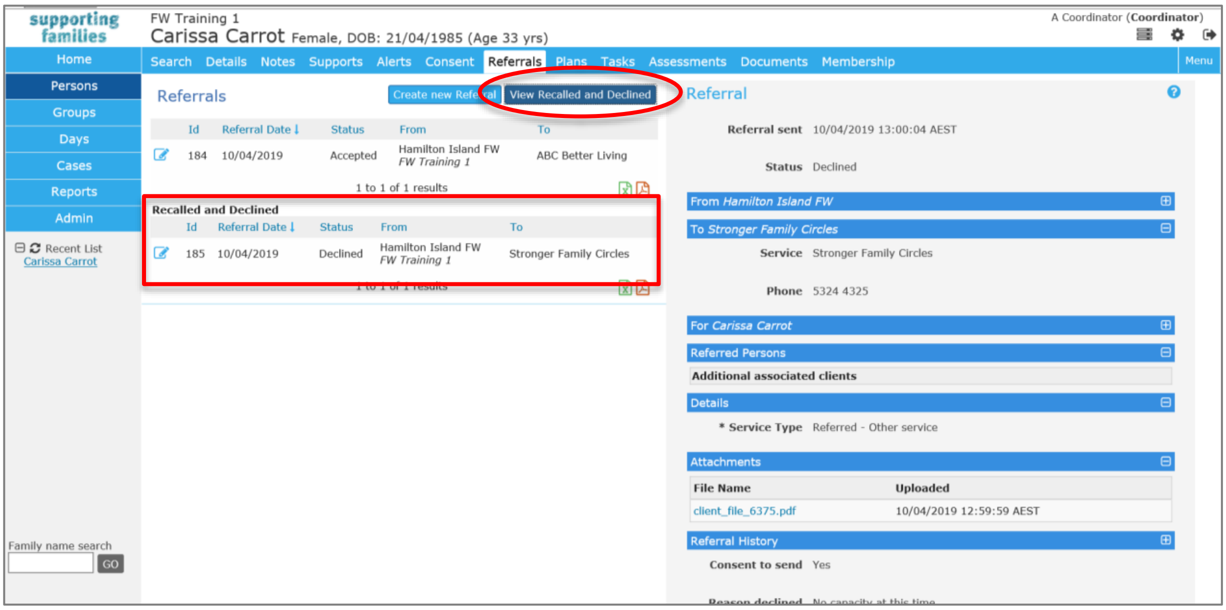
4. Complete by following steps 5 – 15 as detailed for **Record a Manual Referral** in the preceding section.

13.1.4 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.



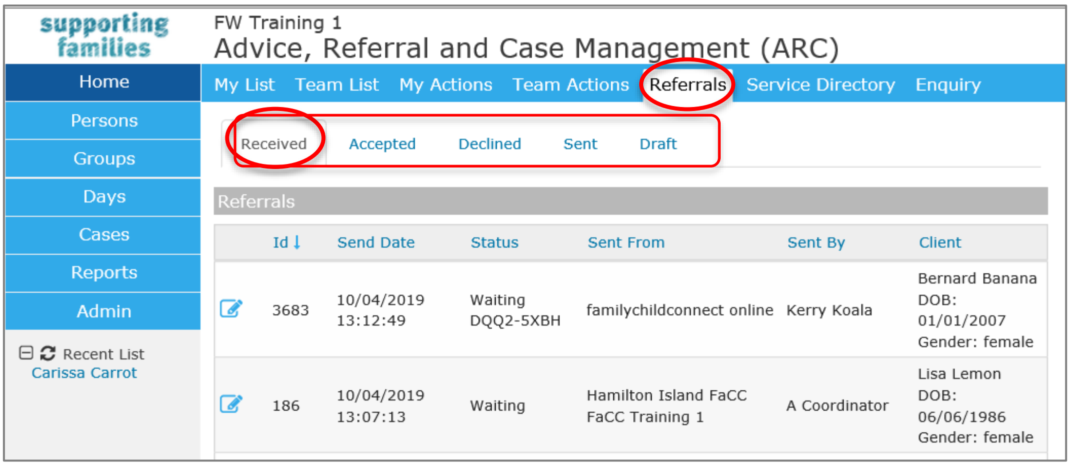
13.2 Receiving Referrals

This tab is only available to those with a Coordinator user profile.

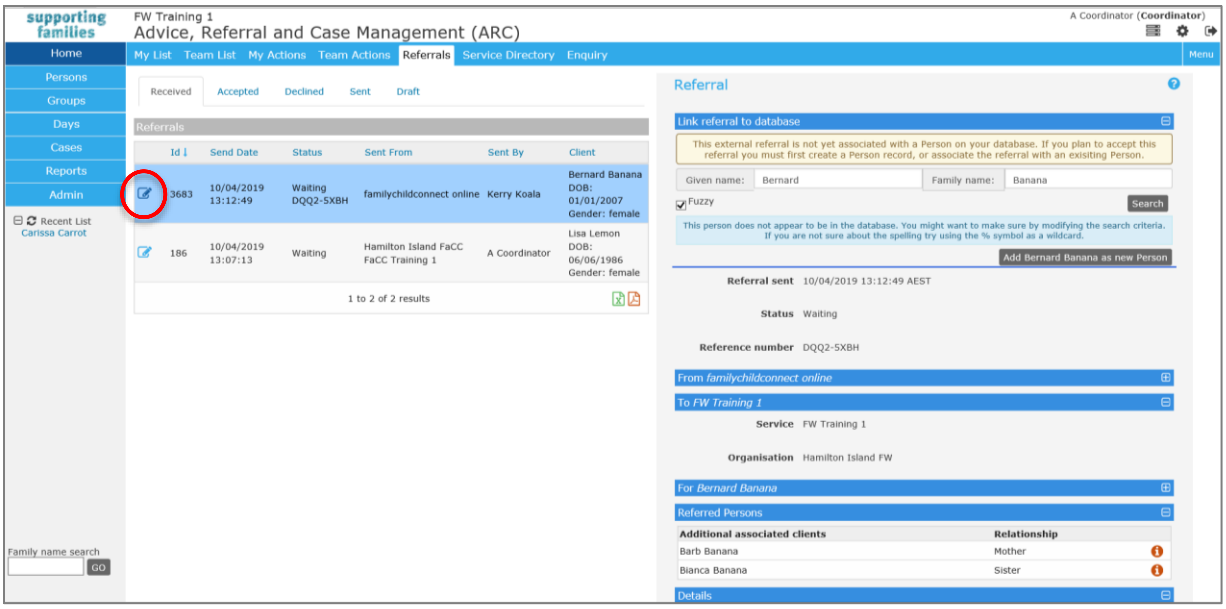
Referrals received from another service using ARC or submitted by members of the public, professionals or Child Safety using *familychildconnect online* referral form, will show in the **Referrals** tab, on the **Home** page.

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

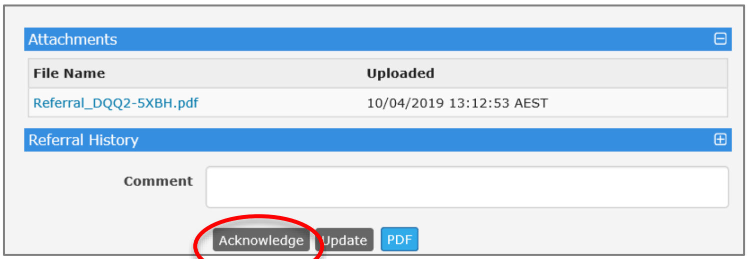
1. On the **Home** page, select **Referrals** tab.



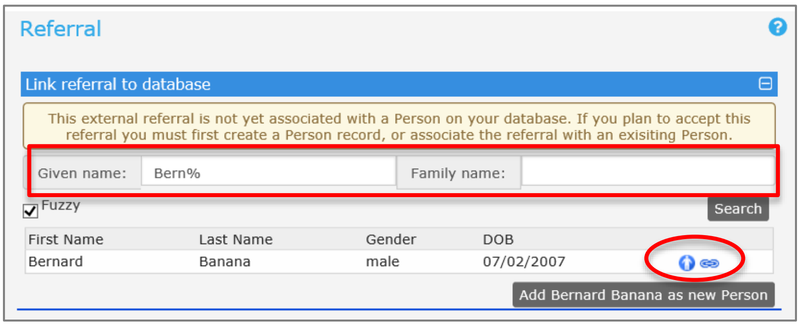
2. In the **Received** sub-tab, select the icon to open the referral form.



3. Click **Acknowledge** located at the bottom of the Referral form.



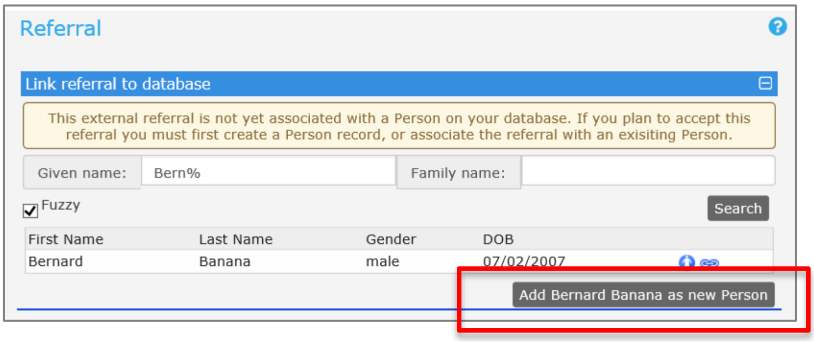
4. It is important to perform a wide search to identify if a Person record exists for the referred person : use the % wildcard on a short version of the Given name and leave the Family name blank, click **Search**.



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.

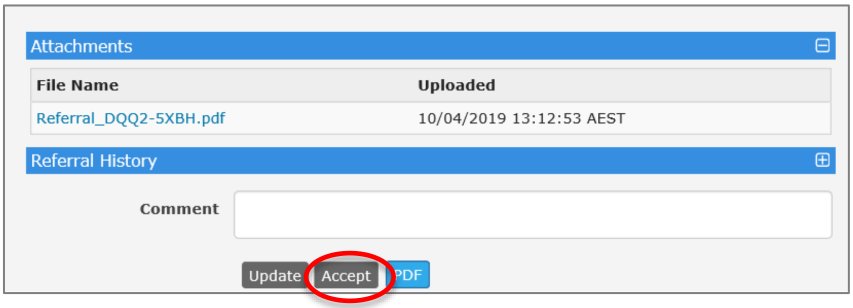
Where it is for the same Person (an exact match), click the blue link icon.

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



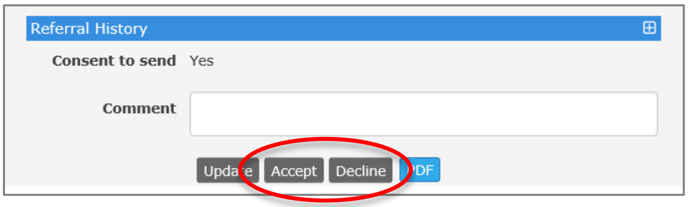
The procedures developed by your service may involve review of the **client_file** in determining whether to Accept or Decline the referral.

6. For referrals from *familychildconnect online*, **Accept** the Referral.



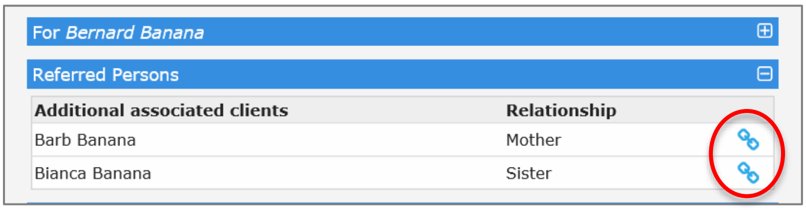
Referrals from *familychildconnect online* are not able to be declined, as there is no automated mechanism to advise the referrer of this decision. You need to **Accept** the referral in ARC and contact the referrer to advise them of the required action. Your time is managing this is captured in a Note.
Should the referral be outside your catchment area, please notify familywellbeing@communities.qld.gov.au immediately.

For referrals received from *another service in ARC*, **Accept** or **Decline** the Referral – the buttons appear at the bottom of the form.
The procedures developed by your service may involve review of the **client_file** in determining whether to Accept or Decline the referral.

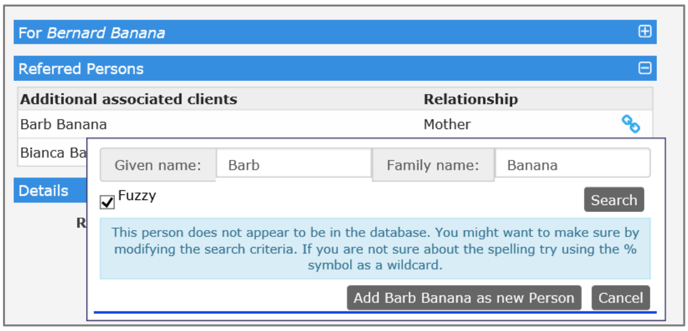


Note: When you respond to a *Family Services* referral, your response will update the **Status** of the referral in your workgroup and in the sending workgroup.

7. 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.



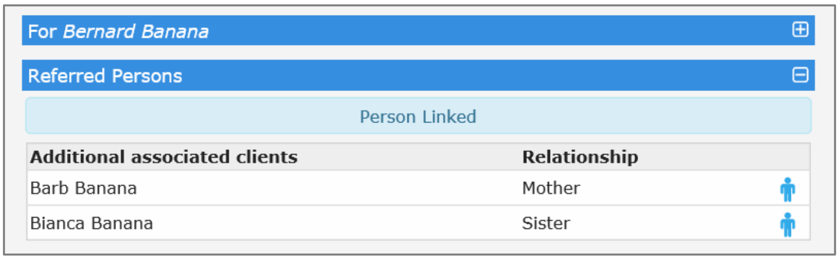
The following message will appear :



This gives you the option to search for the person, or click on **Add…as new Person**.

The following message will appear:

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:

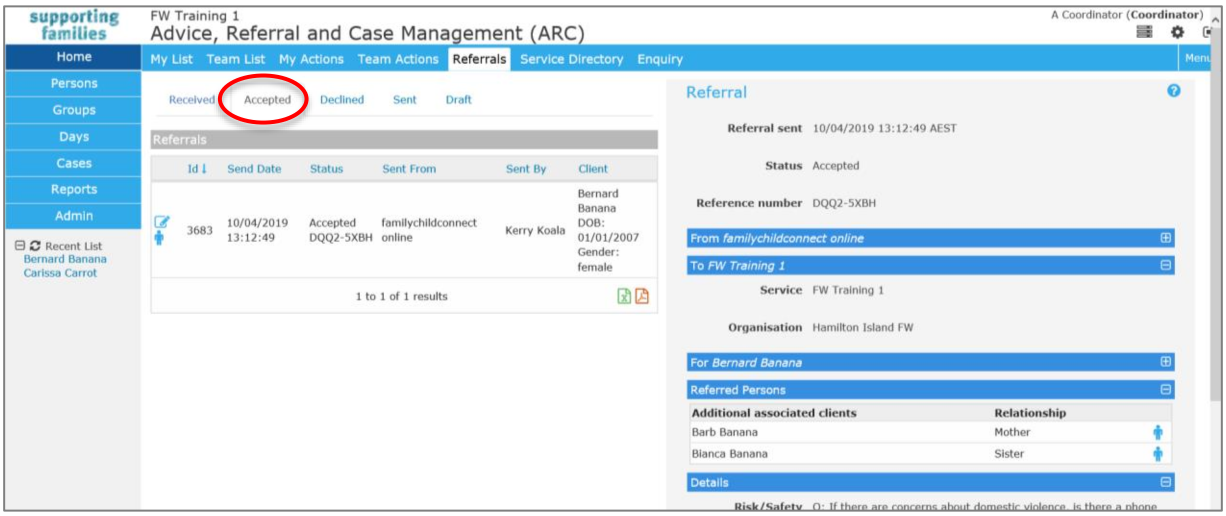


A record of this referral will appear on each **Person** record (in the **Referrals** tab).

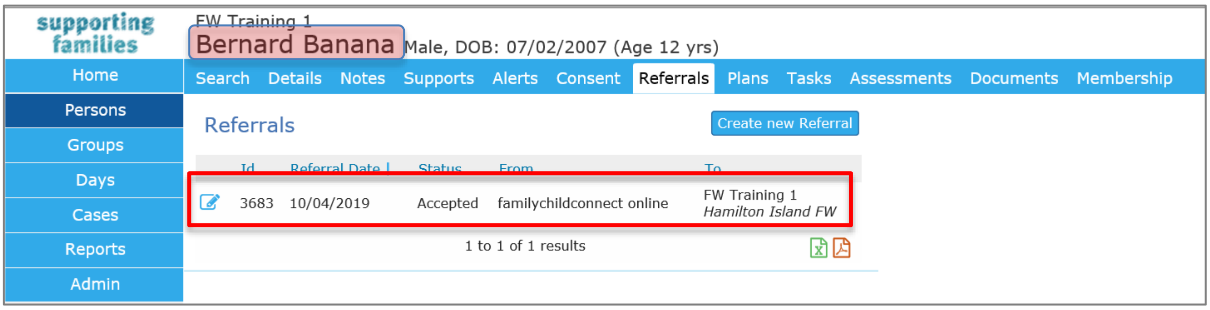
8. Process the referral in ARC in line with the normal procedures :
 - on the **Persons** page, **Details** tab - complete Address, Contact and other information as available
 - on the **Persons** page, **Details** tab - create the **Case Summary**.

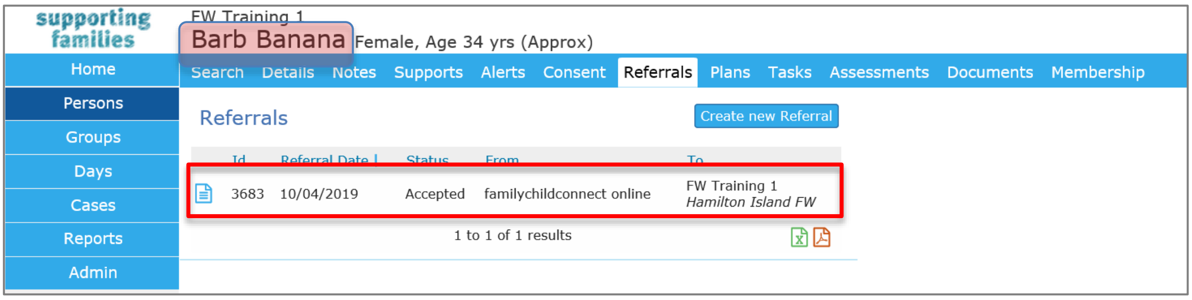
<u>NOTE :</u> For any attachments sent as part of the referral, you must first save them to your network directory/folder (outside ARC) and then attach to the **Case Summary**.

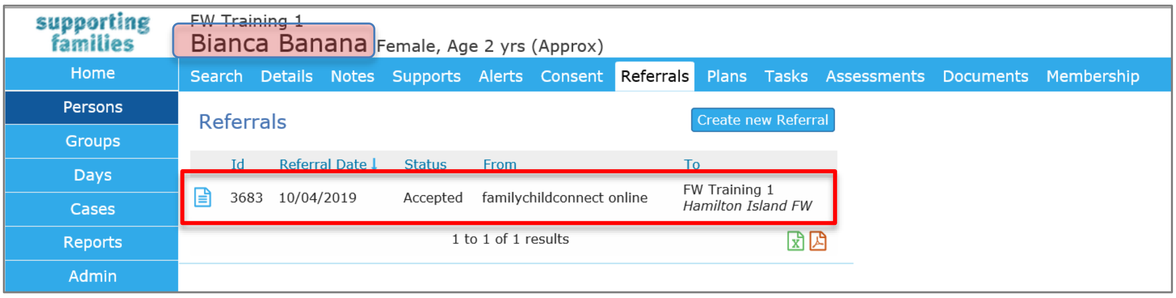
The referral now displays on the **Accepted** sub-tab on the **Referrals** tab**, Home** page**.**



The referral also shows on the **Person** page, **Referrals** tab.







Additional Notes:

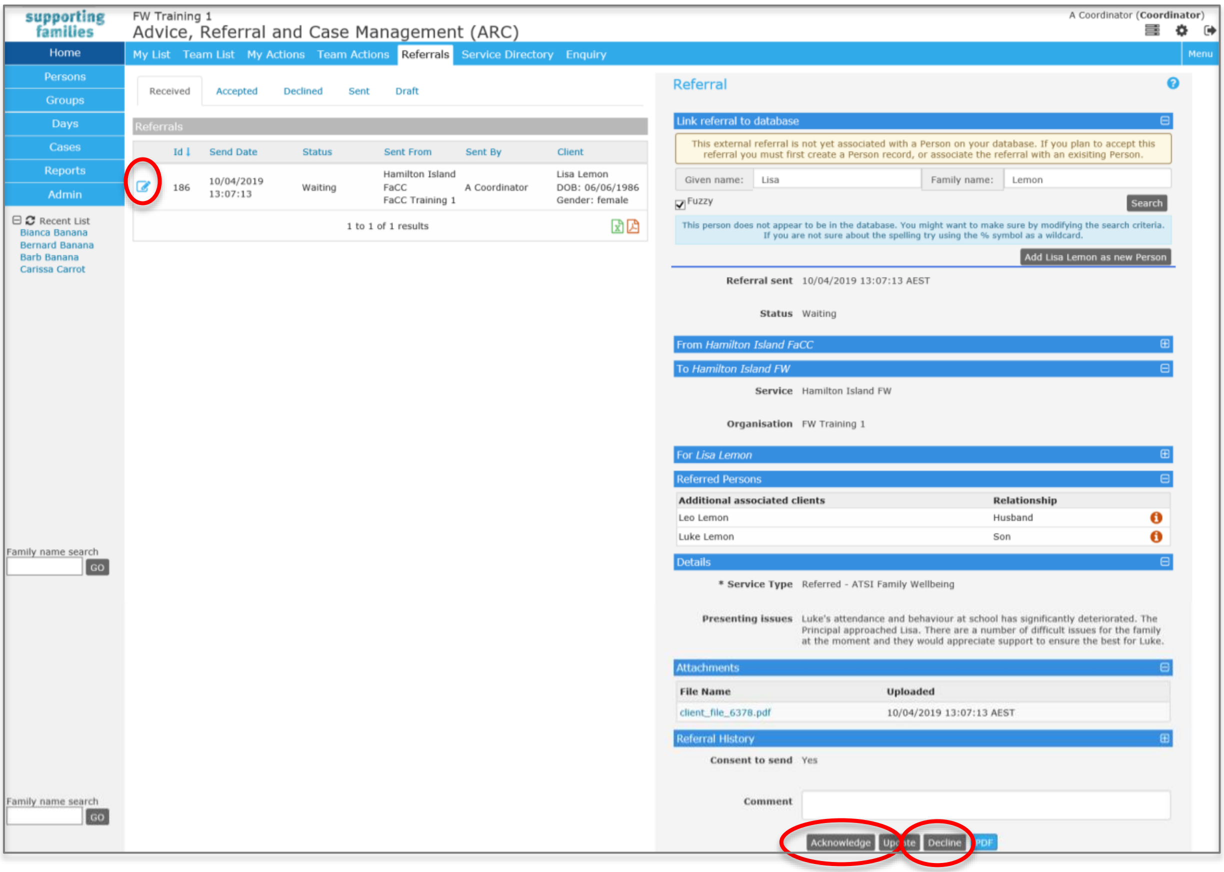
- Each Case Summary can be allocated to a Case Worker – viewed and managed from the **Cases** Page.
  A worker's **My List** only displays **Person** records for which they have been allocated as **Key Worker**.
- **For Coordinators** : Basic reporting is available for referrals sent and received by your service / workgroup – refer section Reporting – Referrals tab.

13.2.1 To decline a Referral

The specific procedures will be as defined by your service.

As noted above, only referrals received from *another service in ARC* are able to be 'declined' in ARC.

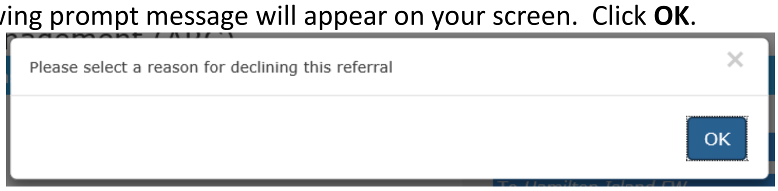
1. Open the Referral by clicking the blue pencil icon on the left of your screen.
   The referral will display on the right-hand side of your screen.



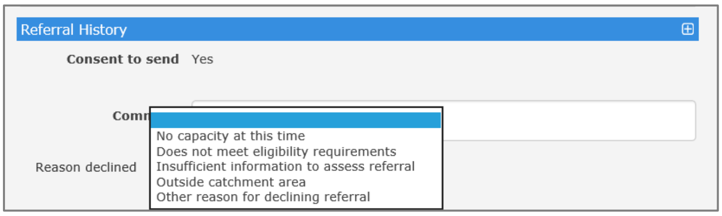
2. Click **Acknowledge** to advise the sending service you are considering the referral.

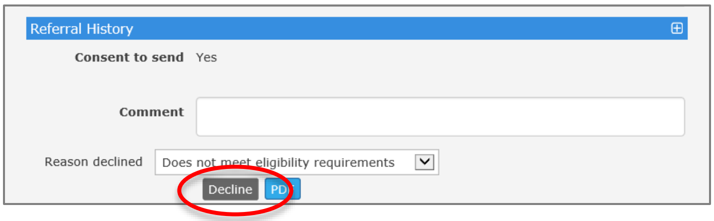
3. When decision has been made to decline the referral, click **Decline**.

4. The following prompt message will appear on your screen. Click **OK**.

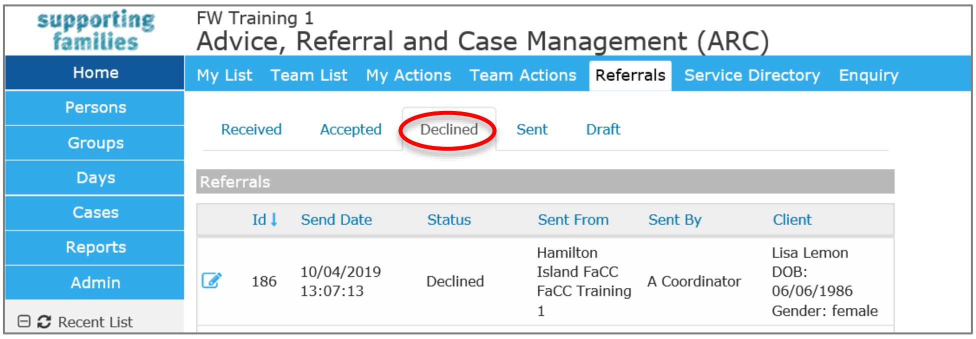


5. Select **Reason declined** from drop-down values, then click **Decline**.

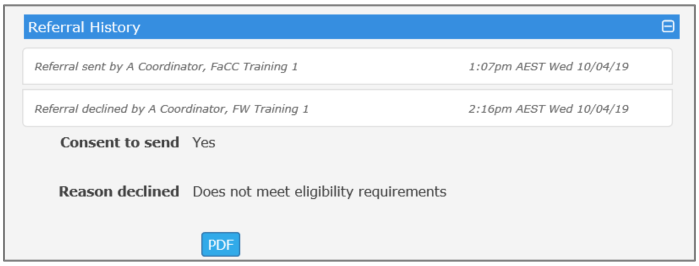




6. The referral will show on the **Home** page, **Referrals** tab – **Declined** sub-tab.



By expanding the **Referral History** segment, you can view the particulars of when the referral was declined.



14 Managing Restricted Access

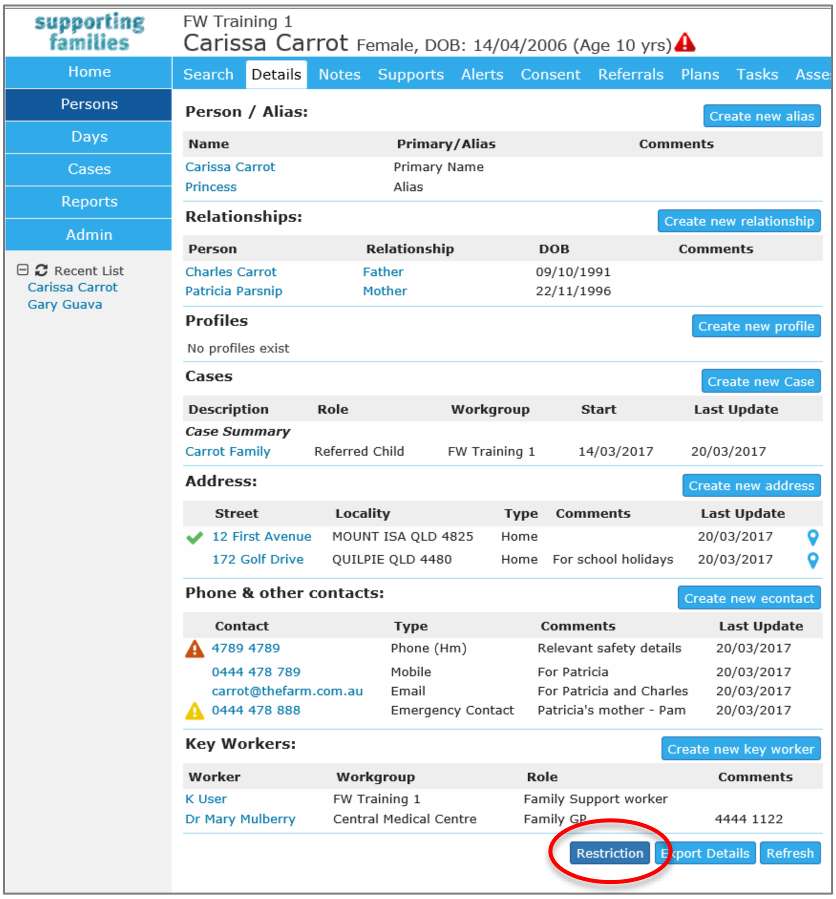
It is acknowledged that, on occasion, client sensitivities require that access to client records be restricted for certain workers within your service.
This section outlines the functionality that has been developed by Infoxchange to enable this.

14.1 Apply Restricted Access

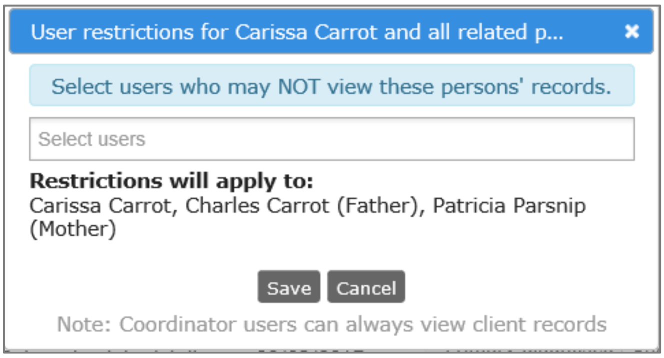
Access to Person records can only be restricted for NORMAL users ie. Coordinators can access all records within your workgroup.

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

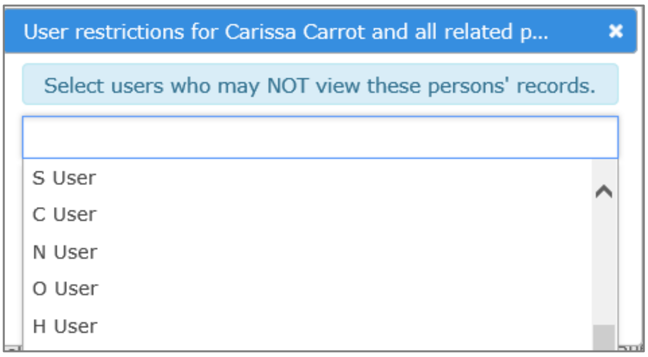
1. Open **Person** Page and display **Details** tab for the Person record requiring access to be restricted.
   Click the **Restriction** button at the bottom.

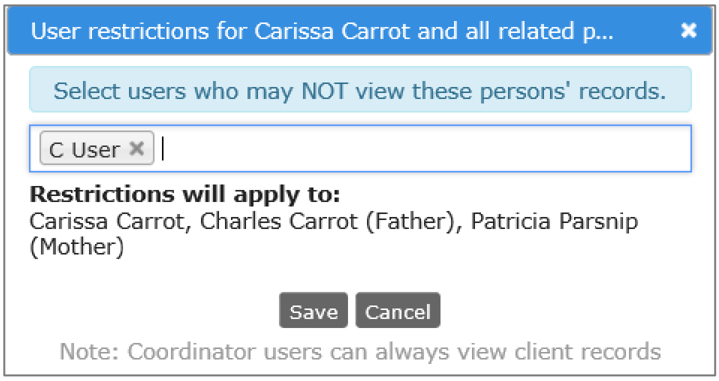


2. The following screen will appear :



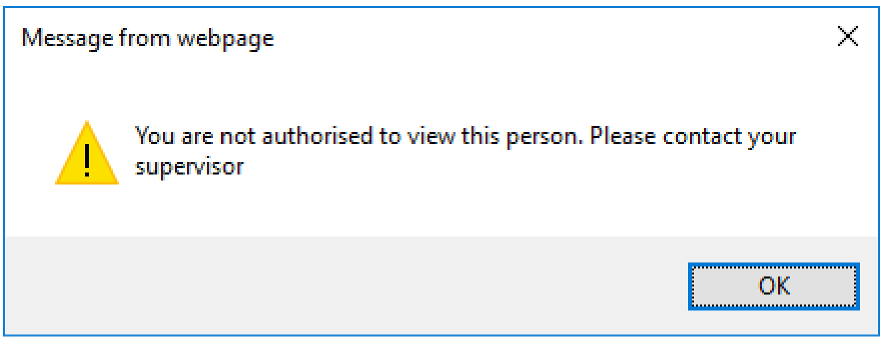
3. Click in the **Select users** field to display workers (with Normal User access) in your service. Select worker/s for whom access is to be restricted.





Click **Save**.

When C User attempts to access Carissa Carrot's record (including those of the Persons with whom a Relationship is recorded), this is displayed :



Key points :

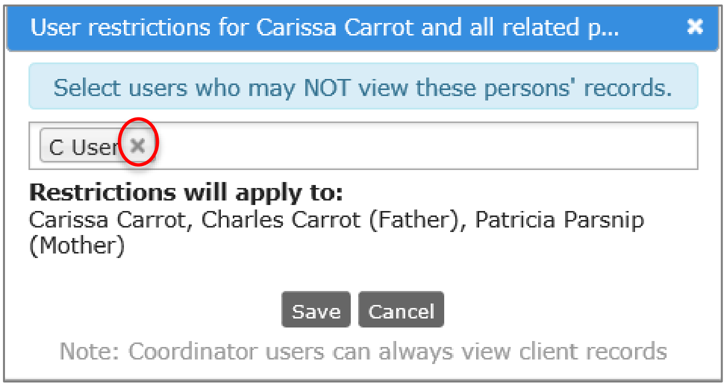
- Normal Users can only view lists they have generated. Identifying details and unstructured data is not included in lists run by Normal Users.
- Normal Users can not access Associated Records from the Cases Page.
- If a worker creates a relationship with a Person for which they have access restricted, 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.

14.2 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.



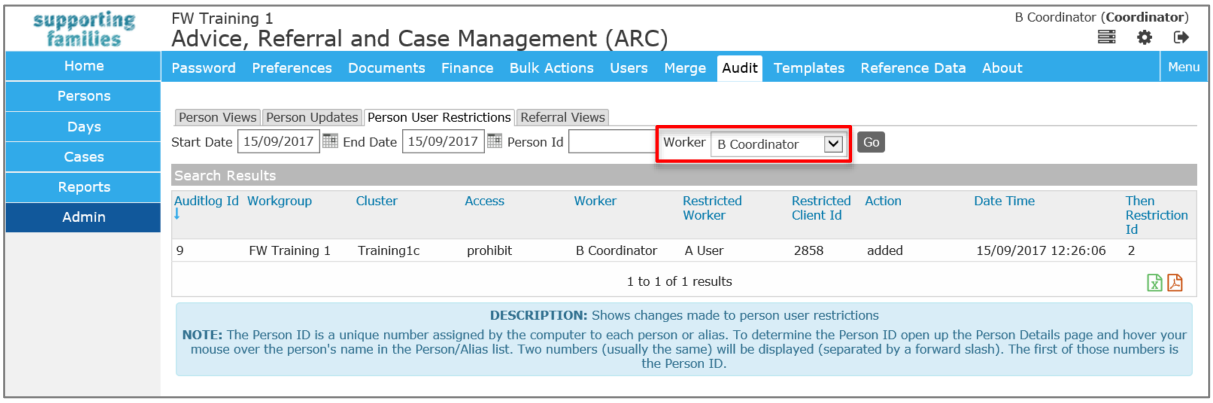
3. Click the **x** against the worker's name (as shown above) and **Save**.
   The message pop-up will no longer display.
   The worker will now have access to that Person's record, and the Persons with whom that Person has Relationships recorded.

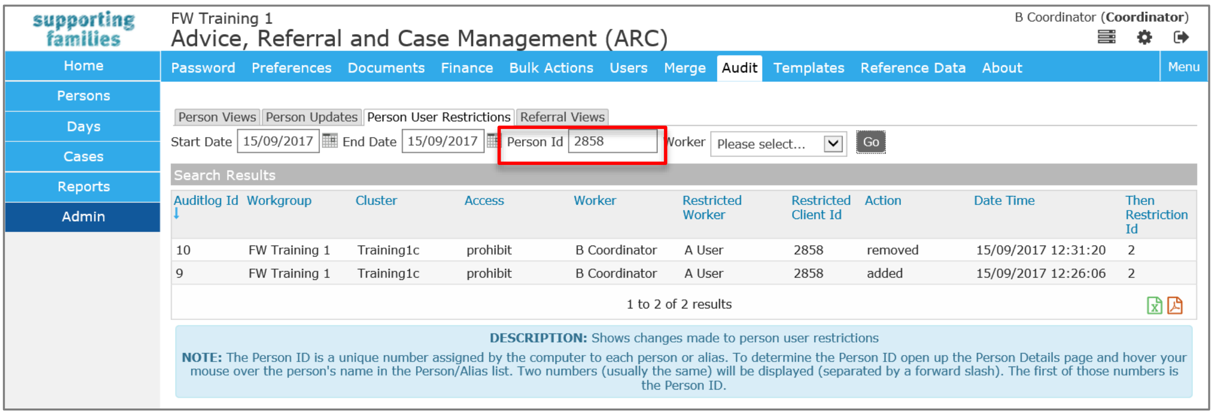
14.3 Restricted Access Audit Log

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.



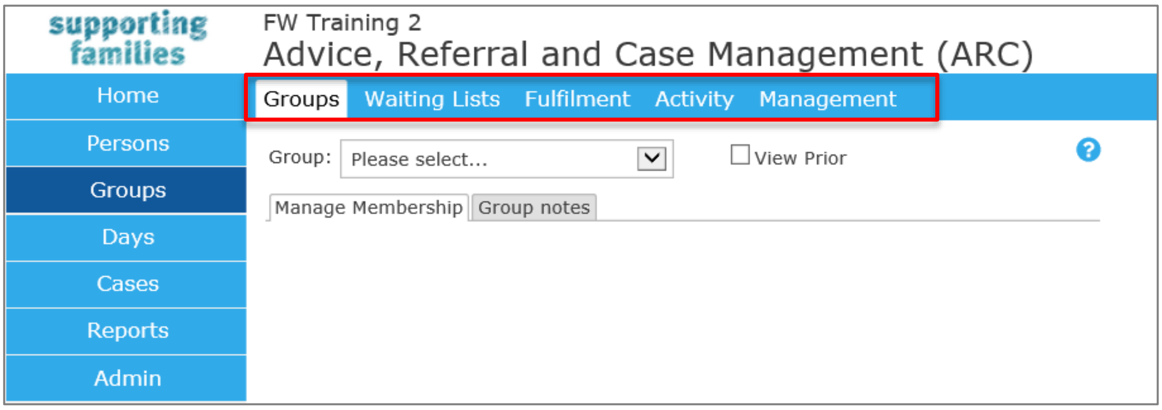


15 Managing group activities

Managing support services delivered through group work and one-off activities held to promote awareness and engagement within the community is available with the **Groups** and **Activity** features within the **Groups** page.

Time spent by workers, as captured in Group Notes and Activity Records respectively, are included in service hours reported within the *ARC Performance Report* and the *OASIS Report* (with details displayed in the corresponding Lists).

The **Groups** page contains 5 tabs :



- **Groups**: to manage targeted group sessions delivered by your service. Membership and attendance at groups can be managed and recorded. Group Notes can be created for activities pertaining to the delivery of that group activity, recognizing attendance and capturing worker time spent on these activities.
- **Waiting Lists**: to track clients who may be waiting for a particular service.
- **Fulfilment**: to create a mailing list of clients who share an interest or have expressed an interest in receiving particular information. You can also use this group type to create invitation lists for clients who share common demographic characteristics.
- **Activity**: to record activities that are not targeted group sessions and/or do not require client participation eg. soft engagement with community.
- **Management**: to create new Groups, Activities and Lists. Retains register of all items created.

Waiting Lists and **Fulfilment** are standard functionality from the Infoxchange SRS product. For guidance on using this functionality, click on the respective Help icon to access SRS Help.

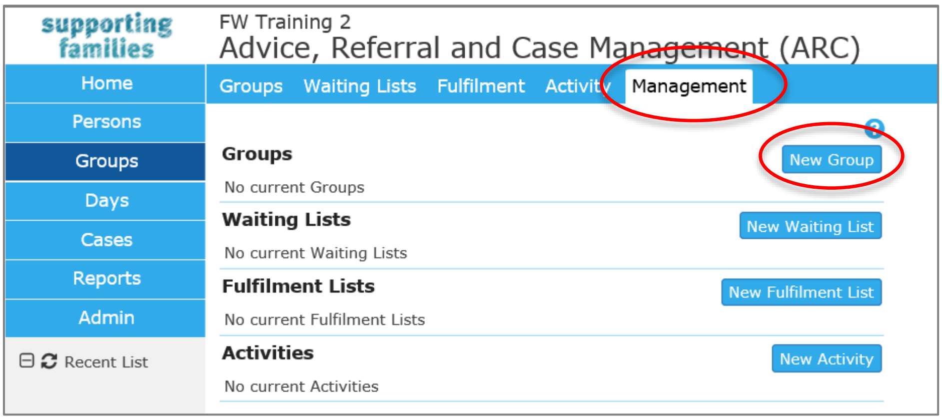
15.1 Managing Groups

This section outlines the steps to create and manage targeted support groups provided as part of service delivery in supporting families.

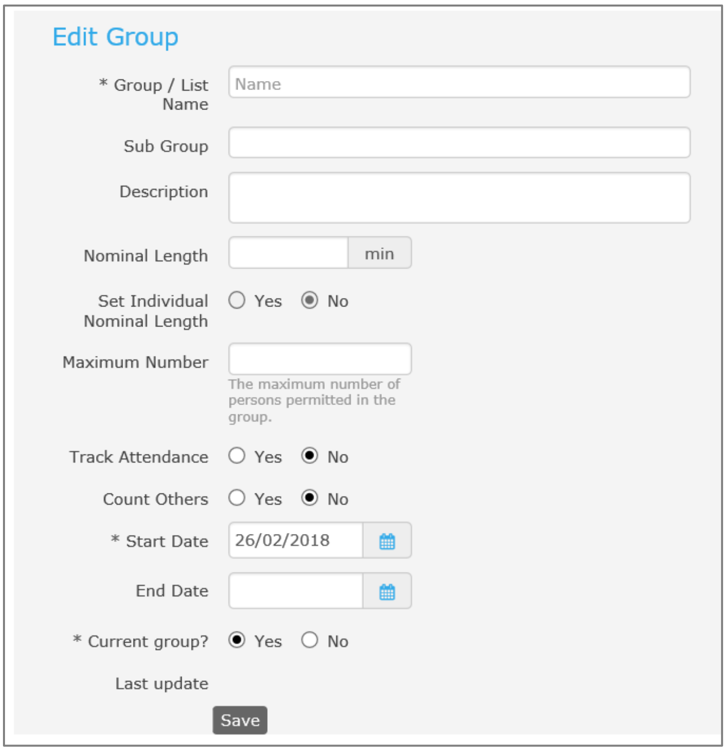
Membership of and attendance at groups can be managed and recorded. Group Notes are created to record activities pertaining to the delivery of that group activity, capturing worker time spent on these activities.

15.1.1 Create a new Group

From the **Groups** page, select the **Management** tab, click **New Group**.

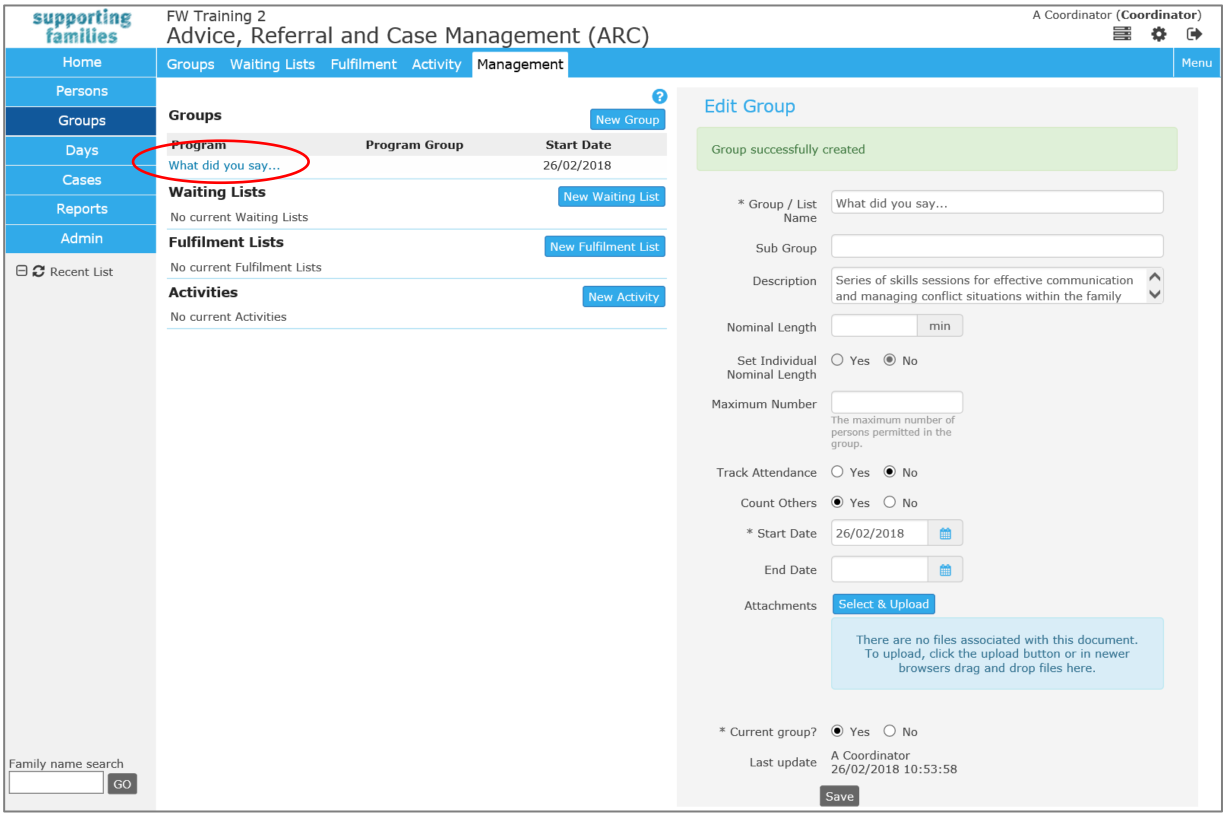


Complete details on the Edit Group form :



- *Group / List Name* is the name of your targeted group sessions/program.
- *Description* can be used to record the purpose / scope of the group sessions.

- *Nominal Length* is not a mandatory field. If a value is entered here, it will pre-populate the Contact time field on the Group Note template for this group.
  It is recommended that this field is left blank.
- *Set Individual Nominal Length* is fixed as No to ensure accuracy of recording service hours.
- *Maximum Number* can be used to help manage the number of participants in the group - refer to Section 15.1.5.
- *Track Attendance* – if 'Yes' is selected, a brief *Attendance Note* will display on the Membership tab for each Person record listed as a member of the Group.
  Please refer to **What does Track Attendance do?** (click this link) to inform your choice.
- *Count Others* – select 'Yes' to enable the number of non-clients (not registered members of the group) who attend a session to be recorded; otherwise, select 'No'
- *Start Date* – defaults to today's date – when this Group record was created in ARC.
- *Current group?* – defaults to 'Yes'.
- Click **Save.**



The new group will now appear in the list / register on the **Management** tab.

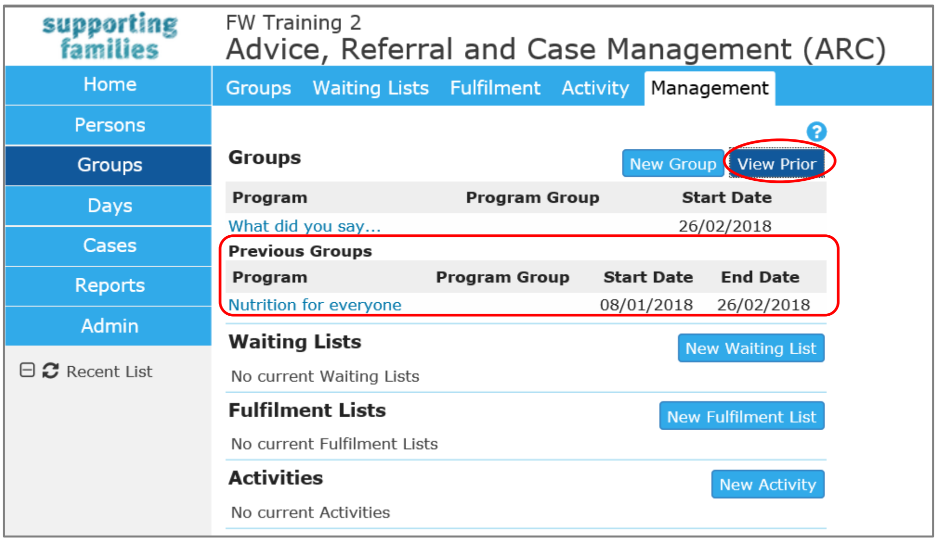
Additional Notes :

- You only need to create one Group template for sessions that are held on a regular basis. Individual Group Notes for that Group will record each session that is held and other activities undertaken in association with that Group.

- You are able to edit/update the details of each Group from this tab, at any subsequent time.

- Any relevant documents are able to be attached to the Group template.

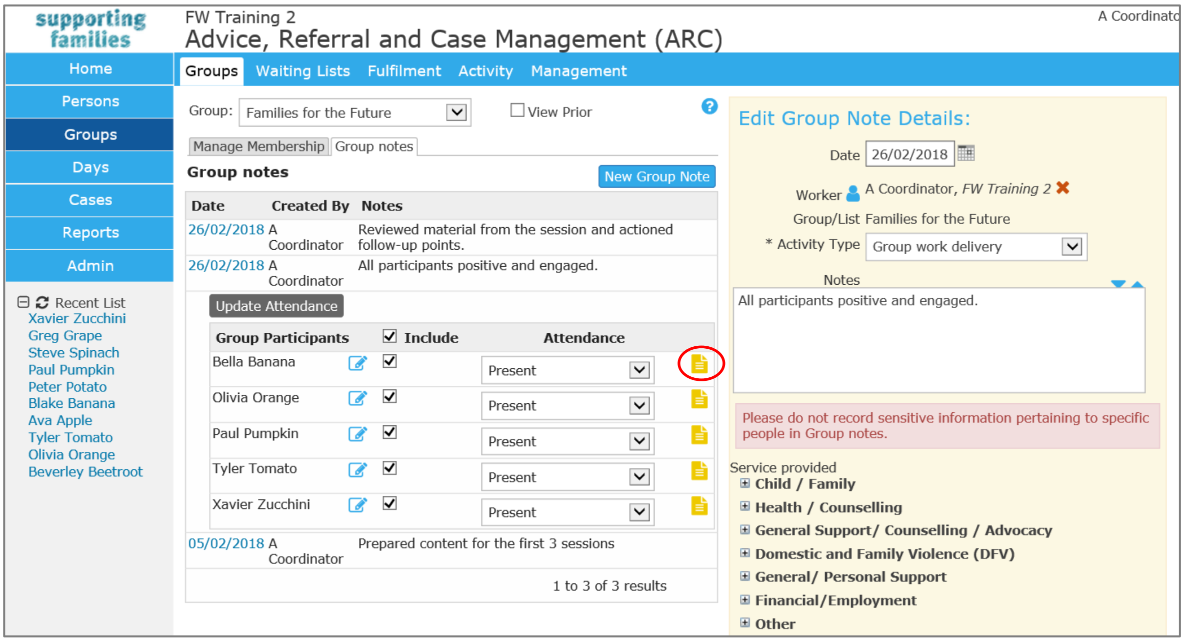
- A Group will remain active until it is closed. This is achieved by recording an **End Date** in the Group template (this will auto-update *Current group?* To No). The record remains accessible via the **View Prior** button.



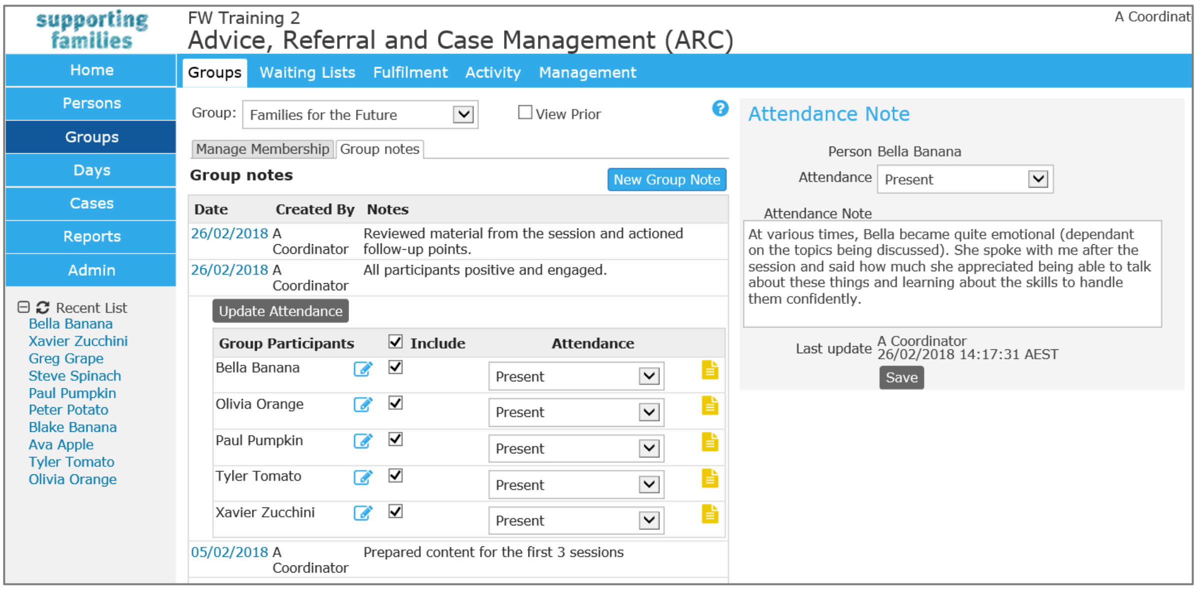
What does **Track Attendance** do?

Where **Track Attendance** is selected as *Yes* (when creating the Group), an *Attendance Note* is created (and displayed on the *Attendance Notes* link the **Membership** tab for that Person) for all Group Notes recorded for that Group. This is standard SRS functionality.

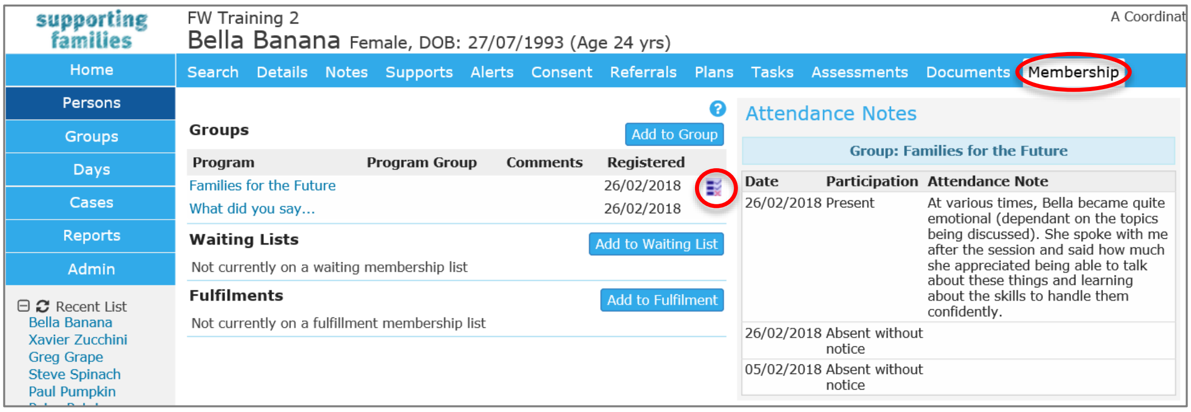
On the **Group Notes** sub-tab, the icon links to the Attendance Note that has been created.



Click this icon to open the Attendance Note for that Person and enter any comments.
Click **Save**.



On the **Person** page, **Membership** tab, the *view attendance record* icon will appear for those groups where it was set-up. An Attendance Note will appear for **ALL** Group Notes created, not just for those the Person attended.



Services need to assess the value of this.

If Track Attendance is set to 'No', the *Attendance Notes* icon does not appear on the Membership tab for each member, but a copy of the Group Note where *Update attendance* is recorded **is** copied to the relevant Person record. Please refer to **Record actions for the Group section** for more information.

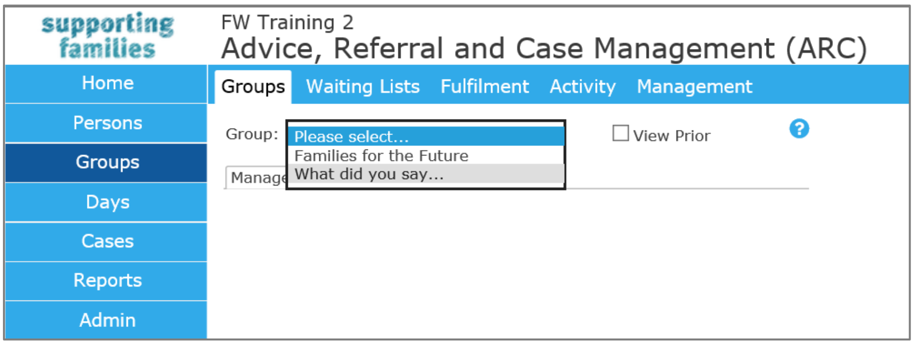
15.1.2 Add a Person to a Group

There are 3 ways a Person can be added to a Group :

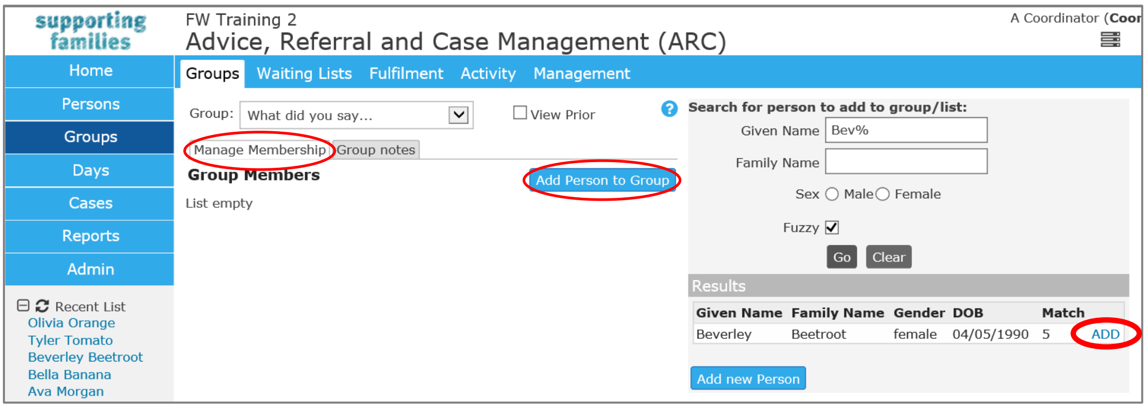
1. On the Groups tab, select individual records
2. On the Groups tab, copy selected members from one group to another
3. On the Person page, Membership tab.

<u>Option 1 :</u> On the Groups tab, select individual records

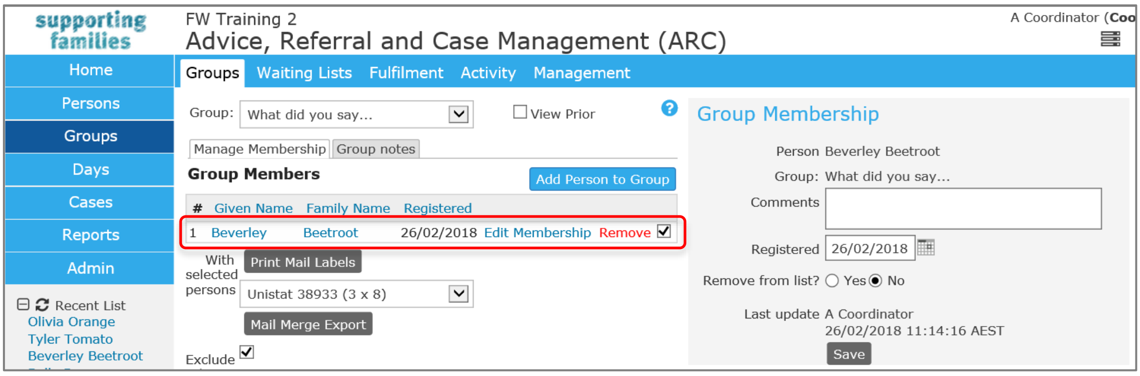
1. From the **Groups** tab, select the required group from the drop-down list.



2. On the **Manage Membership** sub-tab, select **Add Person to Group**.
Search for person, click Go. Click **ADD** for each client as relevant.



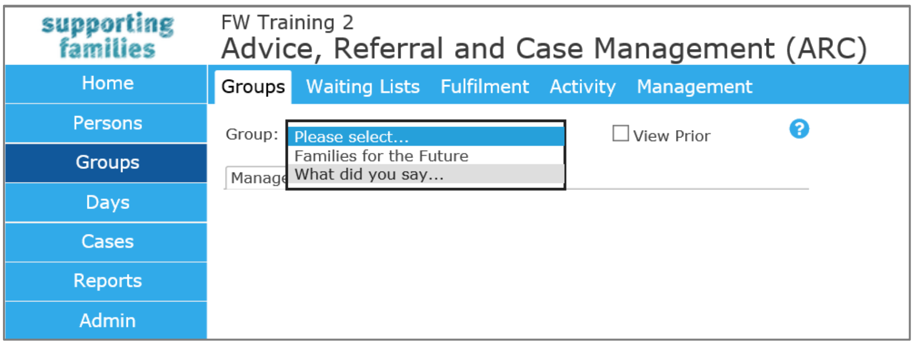
3. Enter any comments for each person, if relevant, and click **Save**. The Person is now listed n Group Members.



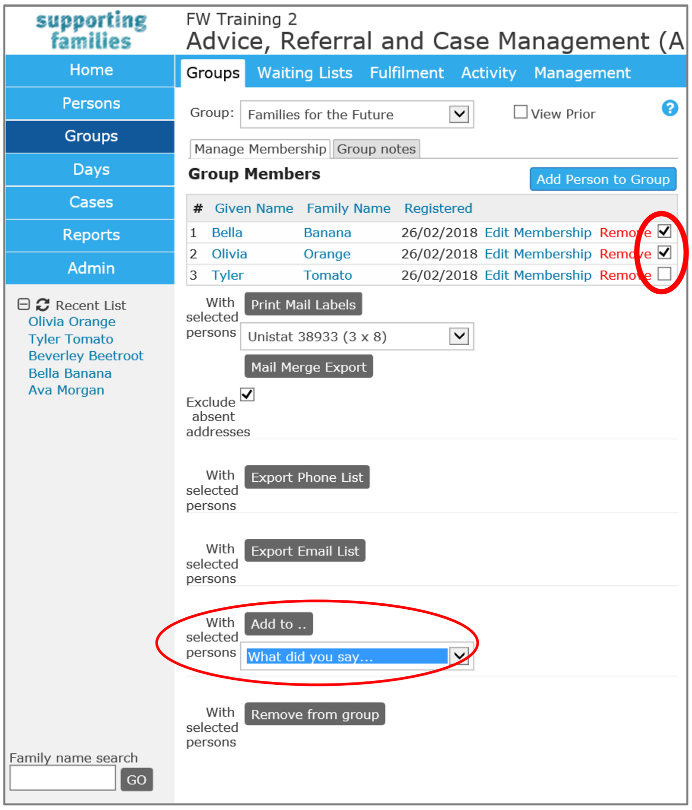
4. Repeat the above steps to add required Persons to the Group.

Option 2 : On the Groups tab, copy selected members from one group to another

1. From the **Groups** tab, select the group you want to copy members from.

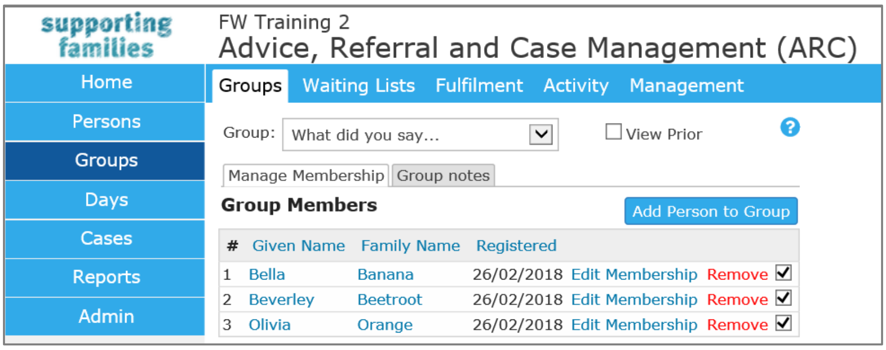


2. Select the persons to be copied to the new group by ensuring their check box is ticked, and in the **Add to** section below, select the group to add the persons to and click **Add to .**



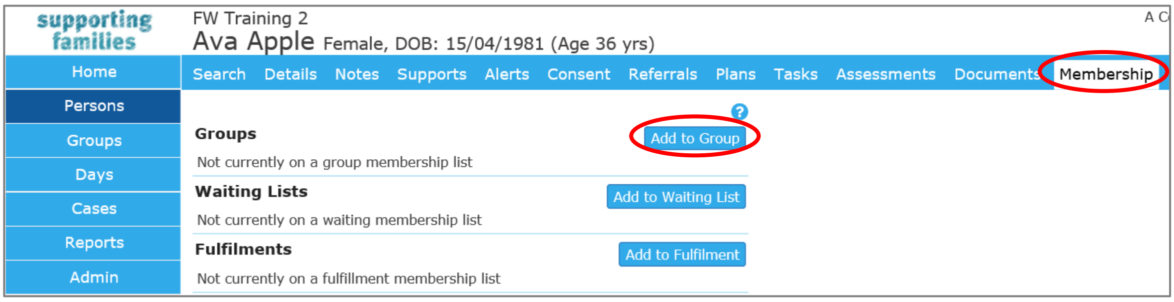
..

These Persons are now members of your new Group, as below.

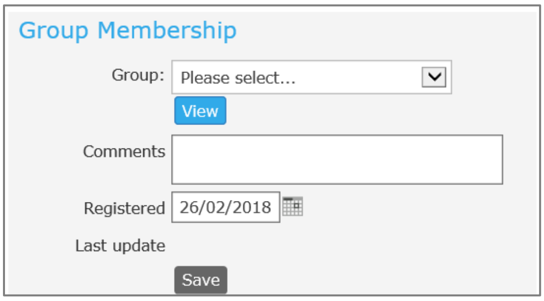


<u>Option 3 :</u> On the Person page, Membership tab

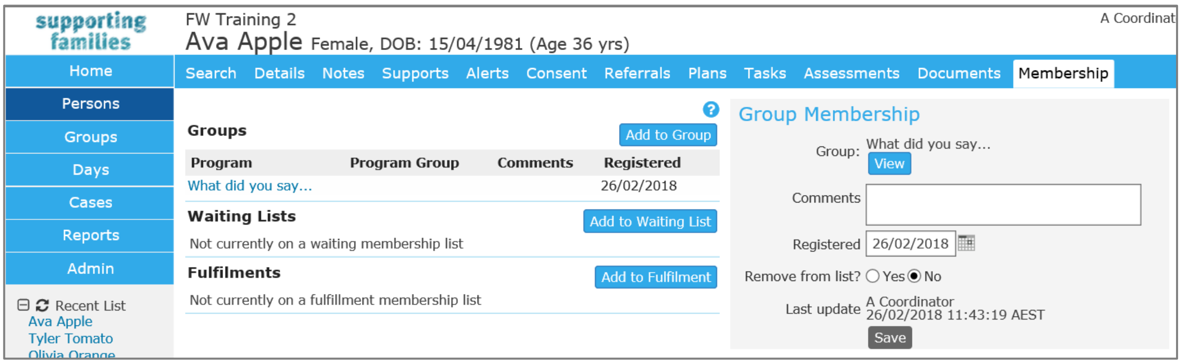
On **Persons** page, **Membership** tab. Select **Add to Group**.



On the Group Membership form, select the relevant Group from the drop down list, add any *Comments* and click **Save**.



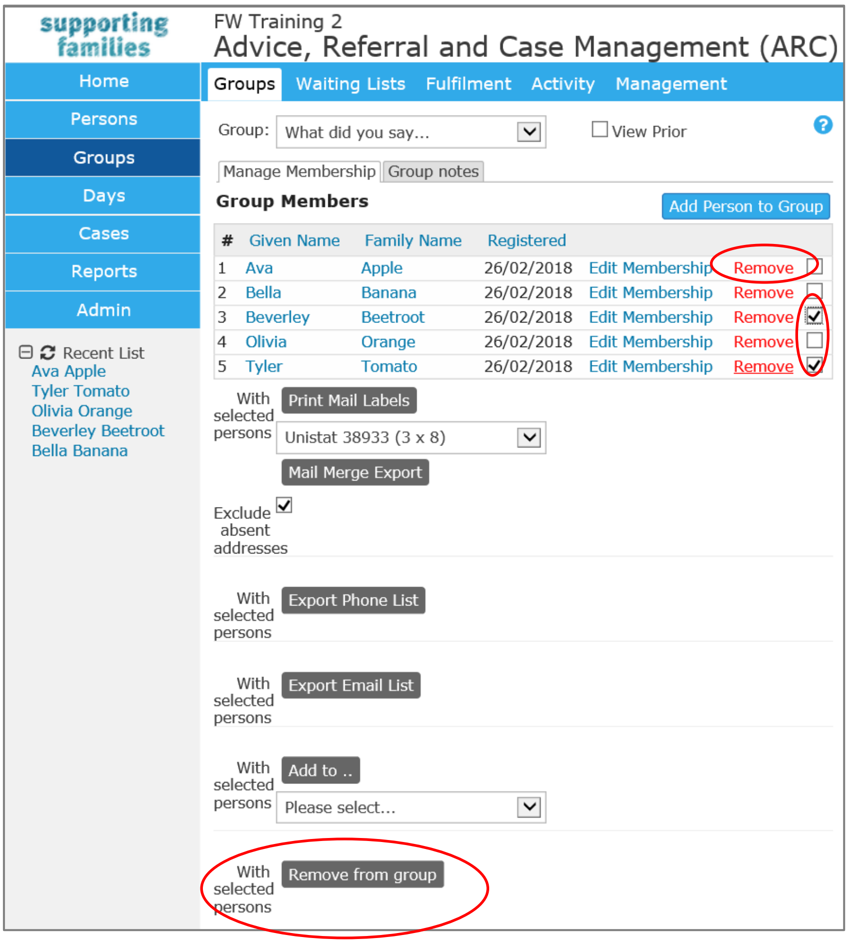
Registered date defaults to today's date.



15.1.3 Remove a Person from a Group

On **Groups** tab, **Manage Membership** sub-tab, simply click on Remove to remove a Person from a Group

To remove multiple Persons from a group, check their tick box and use the **Remove from group** button at the botton of the screen.

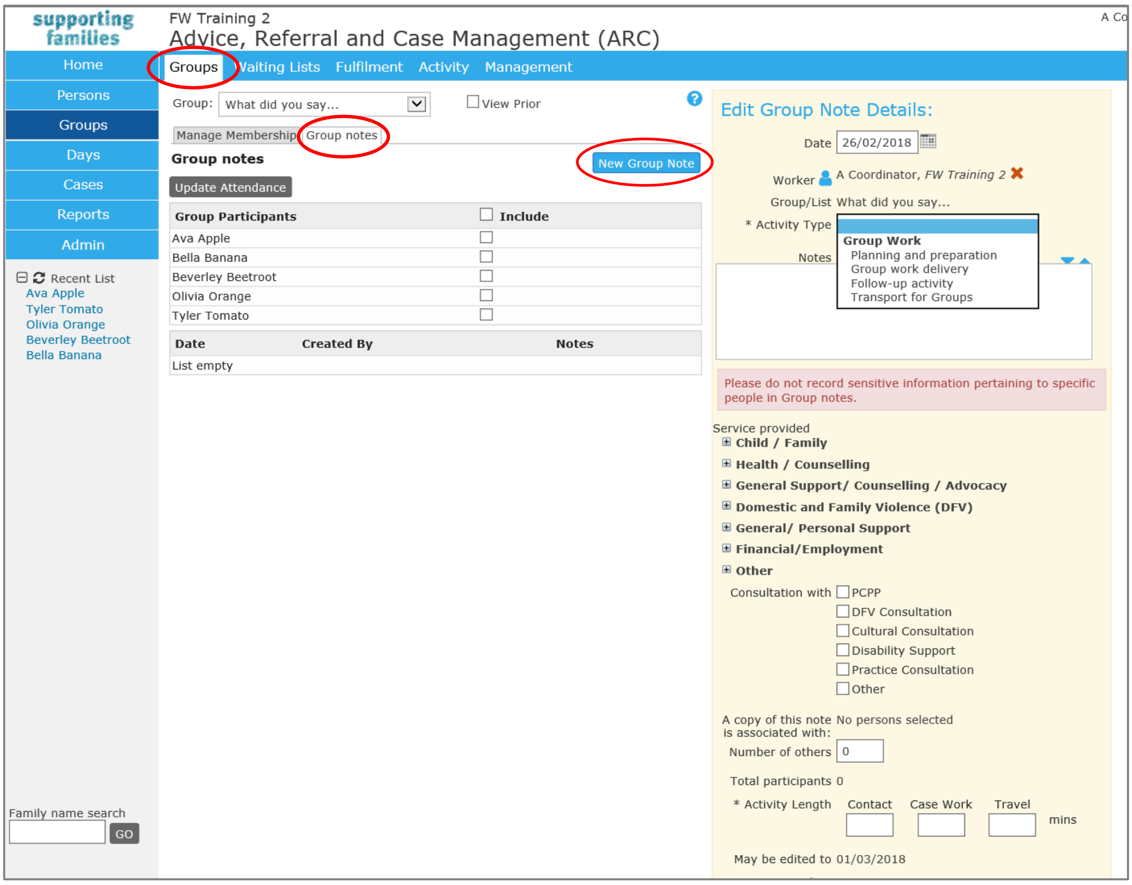


15.1.4 Record actions for the Group

Activities performed in delivering group sessions are recorded using the Group Note features.

From the **Groups** tab, select the required group from the **Group** drop down List.

Select the **Group notes** sub-tab. Click **New Group Note.** The **Edit Group Note Details** form will display.

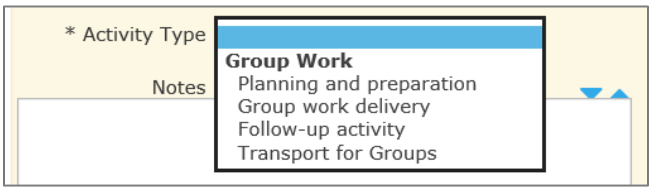


Complete the fields as required :

- **Date** defaults to today's date, but may be manually selected to an alternate date.

- **Worker** defaults to the User creating the Group Note. Click on the blue person icon to add in other workers involved in this particular activity. This will include their time in service hours reported.

- Select the **Activity Type** as relevant to the activity performed.

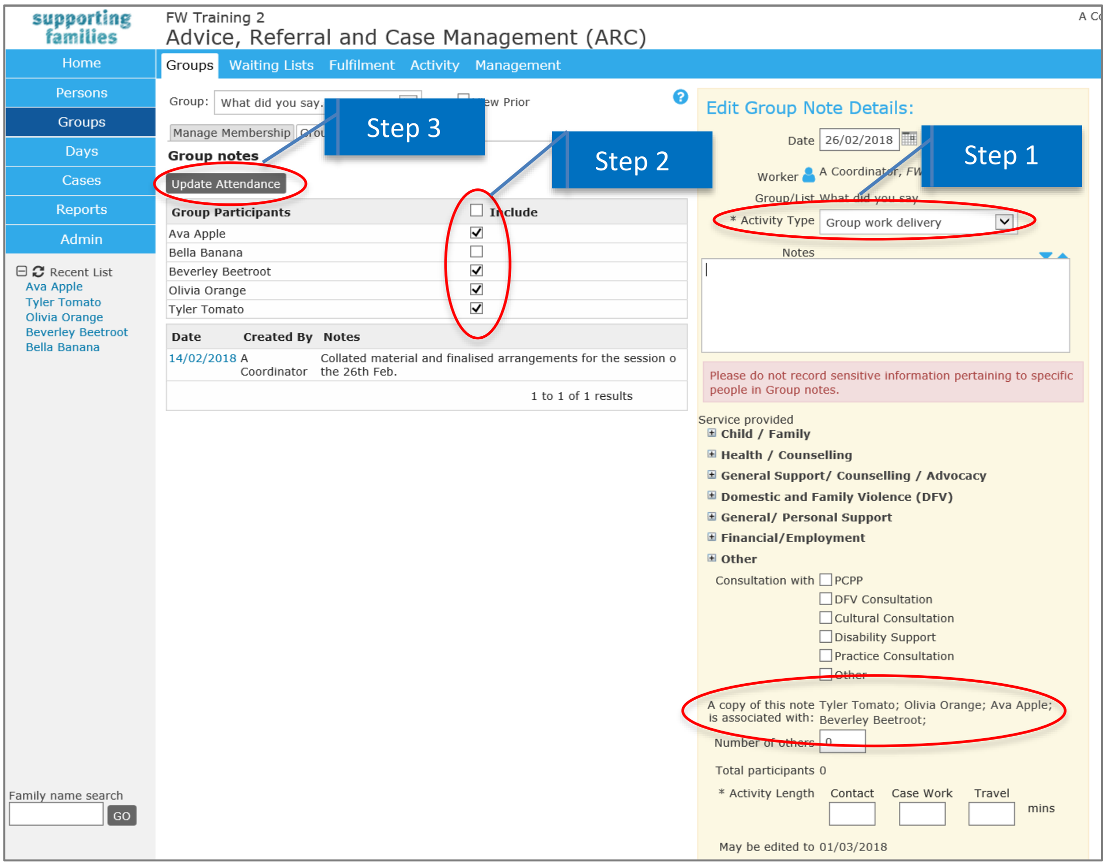


For *Group work delivery*, refer important guidance on following page……

Where the **Activity Type** = *Group work delivery*, to associate this note with group members :
- on the left-hand side of the screen, tick the **Include** box for all clients who attended the session
- then click the **Update Attendance** button.

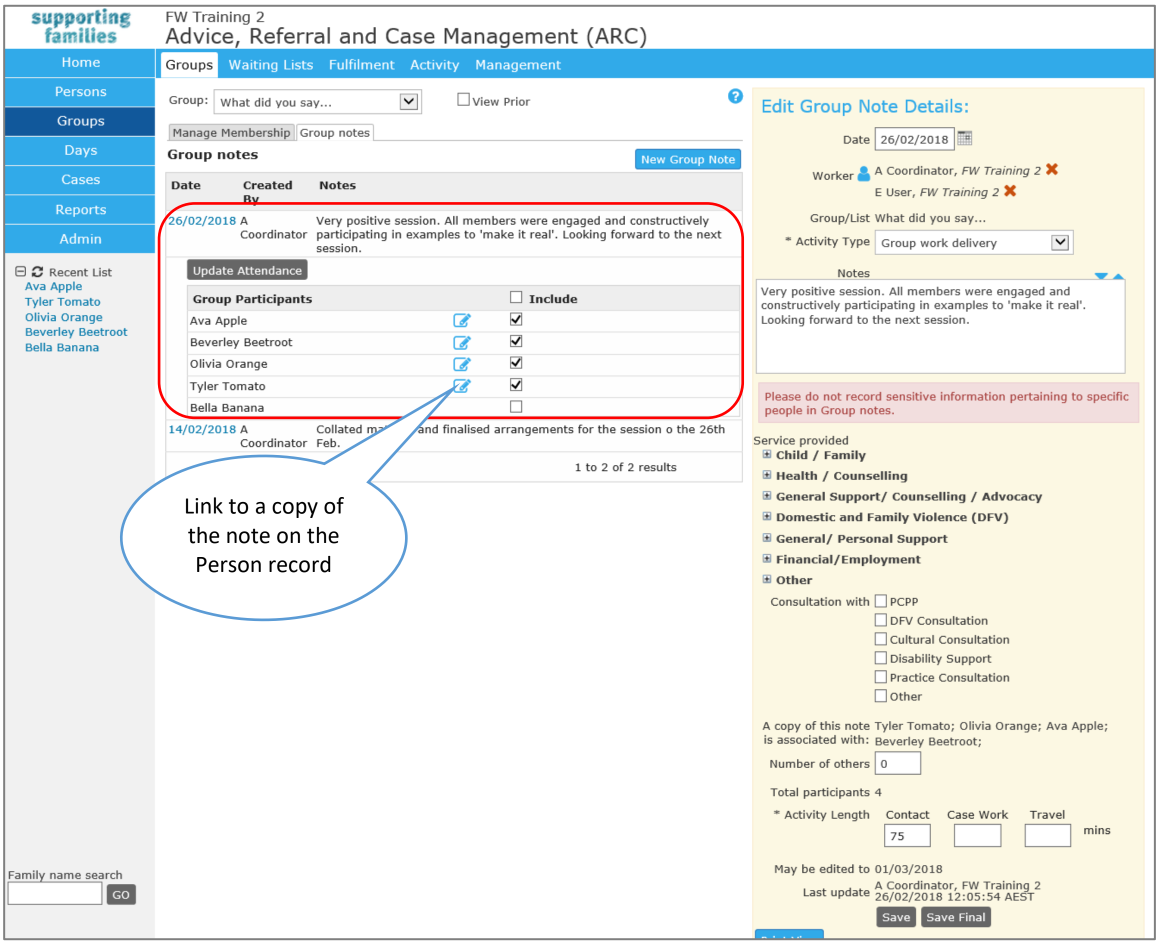
Their names will be added to the Group Note and a copy of this Note will appear on their Person record, Notes tab.

IMPORTANT NOTE: This must be done **prior** to saving the Group Note.



- Complete the **Notes** section, as relevant, to capture details of this particular activity.
- Check the **Services provided** (multiple can be selected), and **Consultation with** section, as relevant
- The *Number of others* field will display if "Count others" was selected when this Group was created. Where the **Activity Type** = *Group work delivery*, record the number of non-group members who attended the group in this box.
  Note : *Total participants* updates upon Save.
- Record the **Activity Length** : Contact, Case work and/or Travel – as relevant
  If the *Nominal Length* field was completed when the Group was created, that time will auto-populate the Contact time box. Simply delete this and record the accurate time associated with this particular activity.
- Click **Save**. The Note will lock after 3 days. Click **Save Final** to lock the Group Note now.

The following screen will display :



IMPORTANT NOTE :

This notice is important to understand.

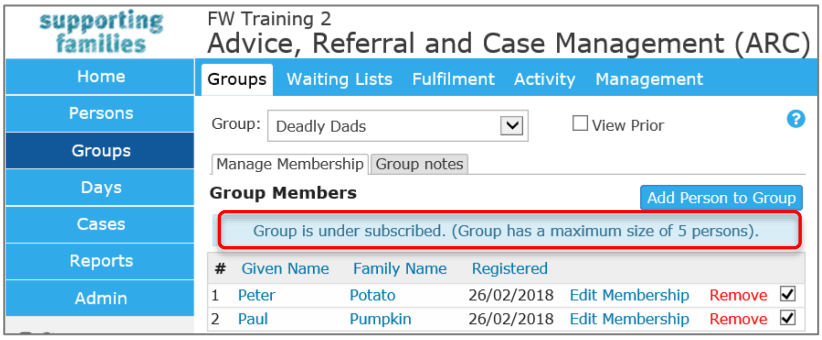
The Group Note is copied to the Person record for those where attendance is marked. If sensitive information is recorded in the Group Note, it will be visible from all attendees' Person records. If a worker is restricted from accessing the records of one member in the group, they are able to view the notes for that group by accessing another group member's Person record. If sensitive information is recorded in the Group Note, they will be able to view this.

15.1.5 Manage the number of participants in a Group

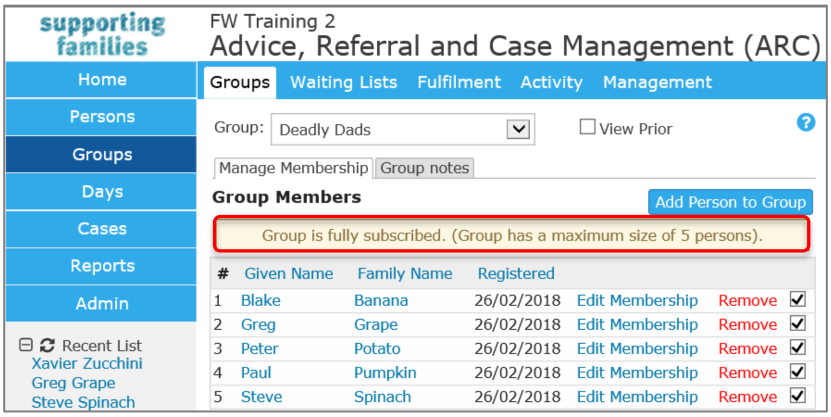
Where a number was recorded in the 'Maximum number' field when the Group was created, relevant messages display for that Group (on the **Groups** tab), as shown in examples below.

There are no restrictions applied – simply messages to assist with managing membership numbers.

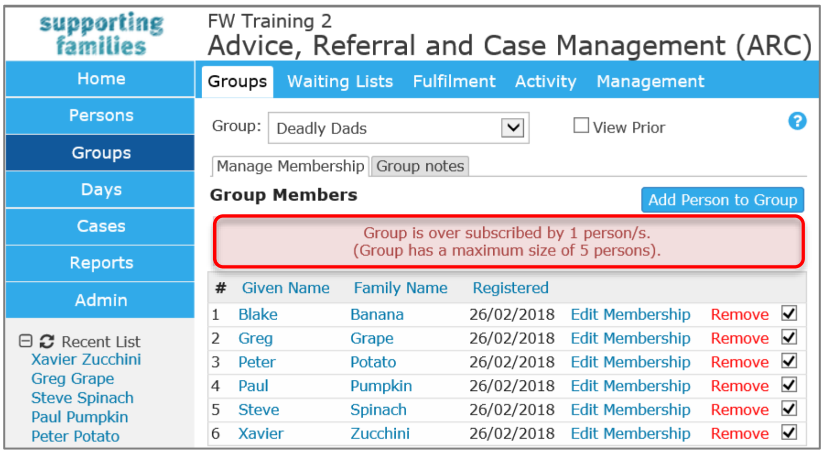
- Where the Maximum Number has not been reached



- Where the Maximum number has been reached



- Where the Maximum number has been exceeded



15.2 Managing Activities

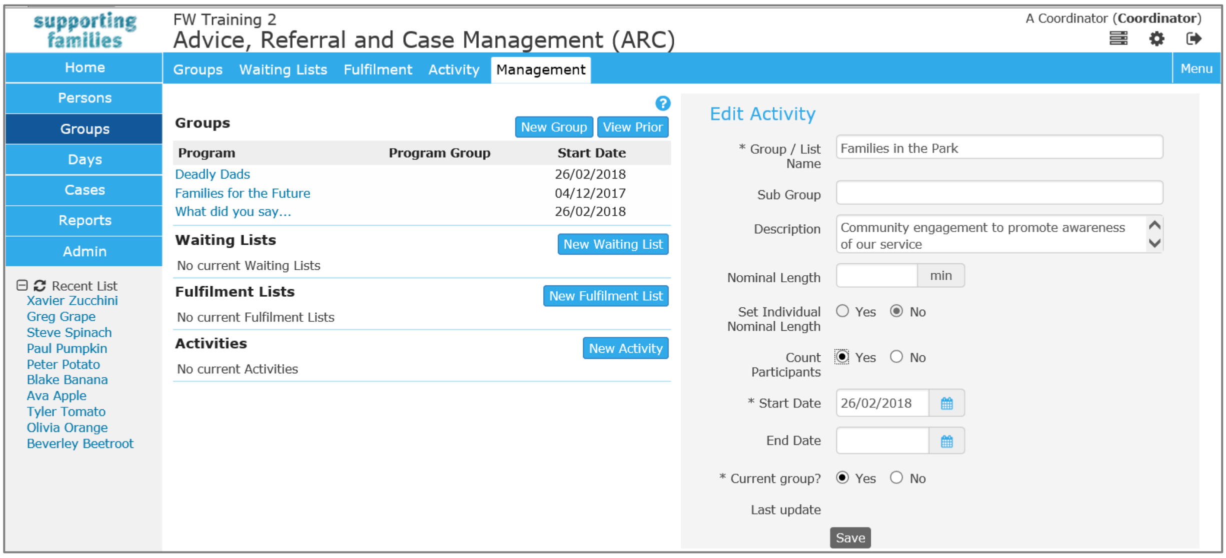
This section outlines the functionality available to record general engagement and information sessions conducted by your service (ie. those that are not targeted support group sessions and where specific attendance by clients is not required).

Activity Records are created to record details pertaining to the delivery of that activity, capturing worker time spent on these activities.

15.2.1 Add a new Activity

From the **Groups** page, select the **Management** tab.

Select **New Activity**. Complete details on the Edit Activity form :



- *Nominal Length* is not a mandatory field. If a value is entered here, it will pre-populate the Contact time field on the Activity Record template for activities associated with this group. It is recommended that this field is left blank.

- *Set Individual Nominal Length* is fixed as No to ensure accuracy of recording service hours.

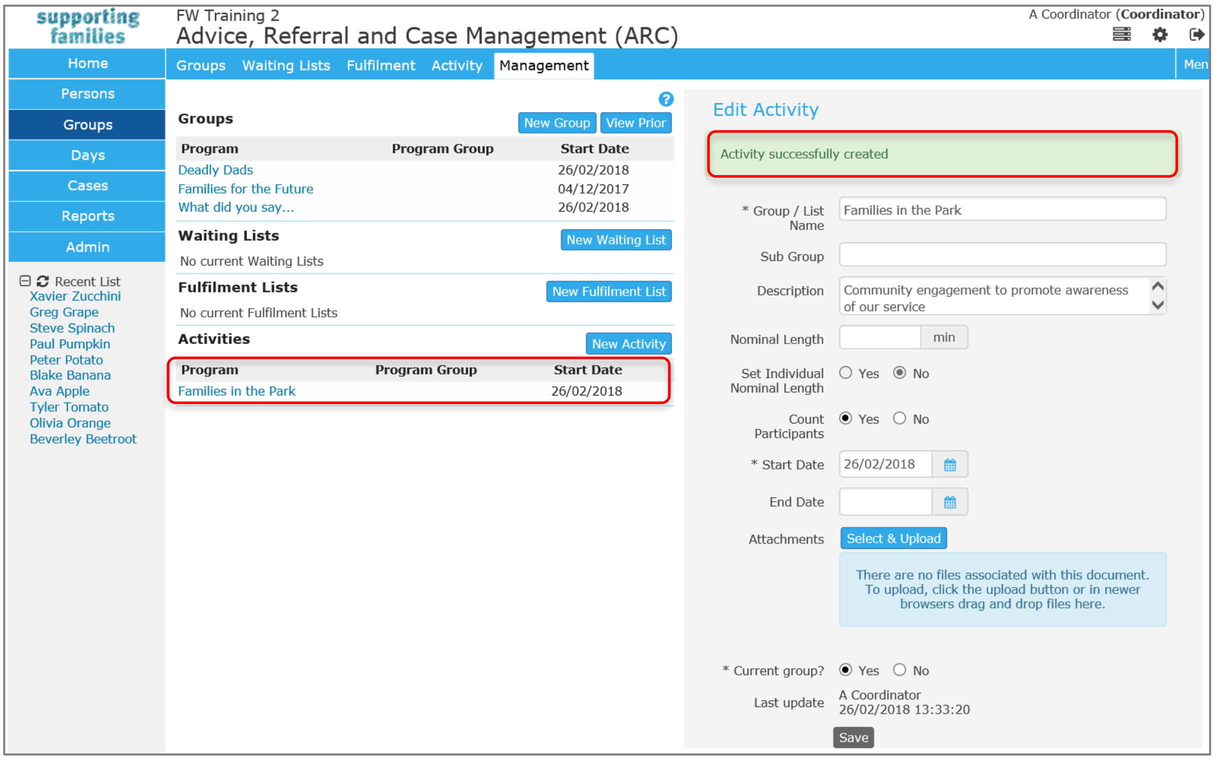
- *Count Participants* – select 'Yes' to enable the number of people who attend a session to be recorded; otherwise, select 'No'

- *Start Date* – defaults to today's date – when the Group was created in ARC.

- *Current group?* – defaults to 'Yes'. This is a read-only field.

- click **Save**.

The new Activity displays in the list / register on the **Management** tab.



Additional Notes :

- You only need to create one Activity template for sessions that may be held on a regular basis. Individual Activity Records for that Activity will record each session that is held.
- You are able to edit/update the details of each Activity from this tab, at any subsequent time.
- Any relevant documents are able to be attached to the Activity template.

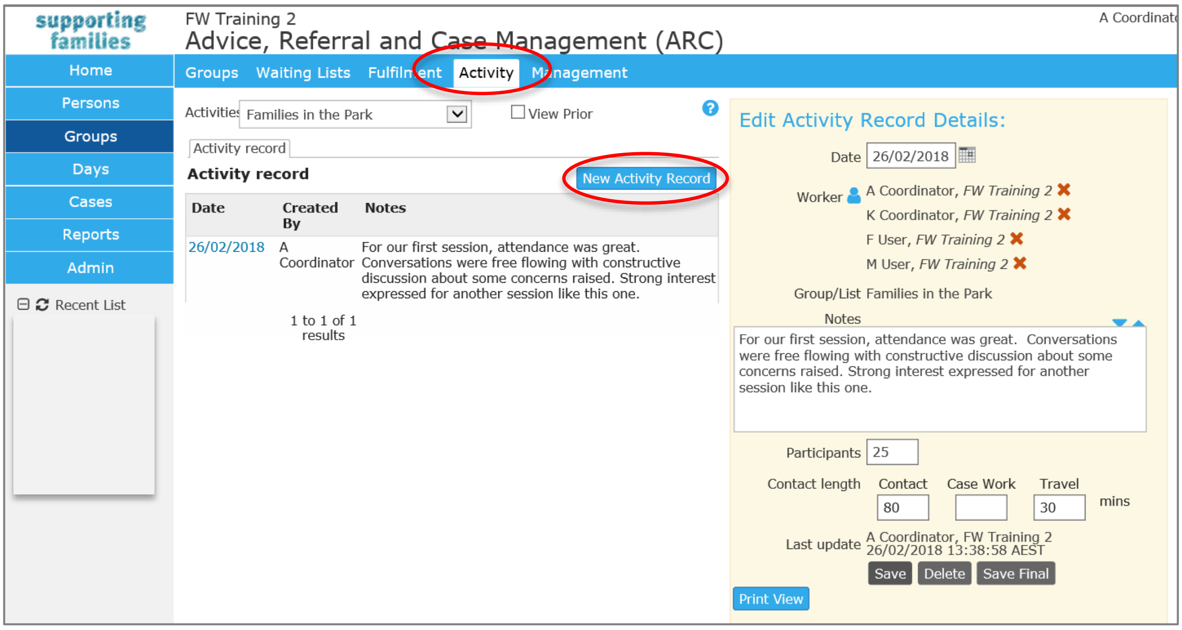
An Activity will remain active until it is closed. This is achieved by recording an **End Date** in the Activity template (this will auto-update *Current group?* to No). The record remains accessible via the **View Prior** button.

15.2.2 Record actions for the Activity

Actions associated with delivering this Activity are recorded using the Activity Record features.

From the **Activity** tab, select the required Activity from the drop down List.

Click **New Activity Record.** The **Edit Activity Record Details** form will display.



Complete the fields as required :

- **Date** defaults to today's date, but may be manually selected to an alternate date.

- **Worker** defaults to the User creating the Activity Record. Click on the blue person icon to add in other workers involved in this particular activity. This will include their time in service hours reported.

- Complete the **Notes** section, as relevant, to capture details of this particular activity.

- Record the number of **Participants** – the number of people (excluding workers) who attended the event. This field will display if 'Yes' was chosen for *Count Participants* when the Activity was created.

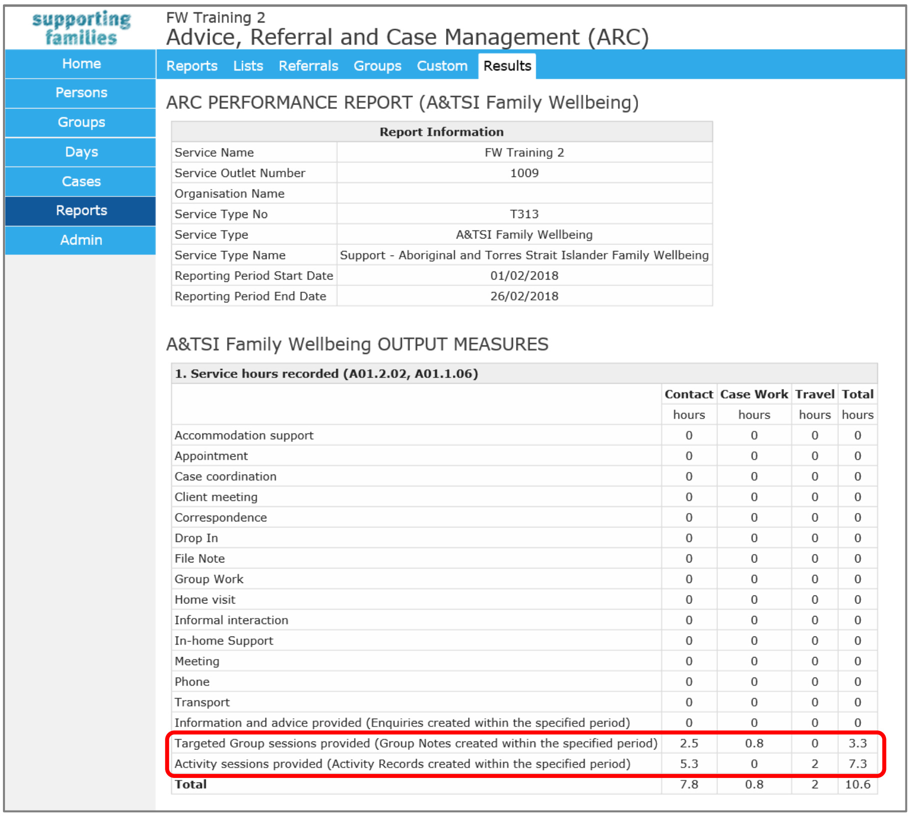
- Record the **Activity Length** : Contact, Case work and/or Travel – as relevant
  If *Nominal Length* was recorded when the Activity was created, this value will pre-populate in the Note. This can be overridden to accurately record the worker time associated with this specific Activity Record.

- Click **Save**. The Note will lock after 3 days. Click **Save Final** to lock the Group Note now.
  The Activity Record will show on the left-hand side.

15.3 Reports available

Reports for Groups and Activities held within a specified period are available through a number of different options.

1. The **ARC Performance Report** includes the total of time captured in Group Notes and Activity Records in *Table 1 . Service hours recorded*



supporting families

FW Training 2

Advice, Referral and Case Management (ARC)

Home | Persons | Groups | Days | Cases | Reports | Admin

Reports | Lists | Referrals | Groups | Custom | Results

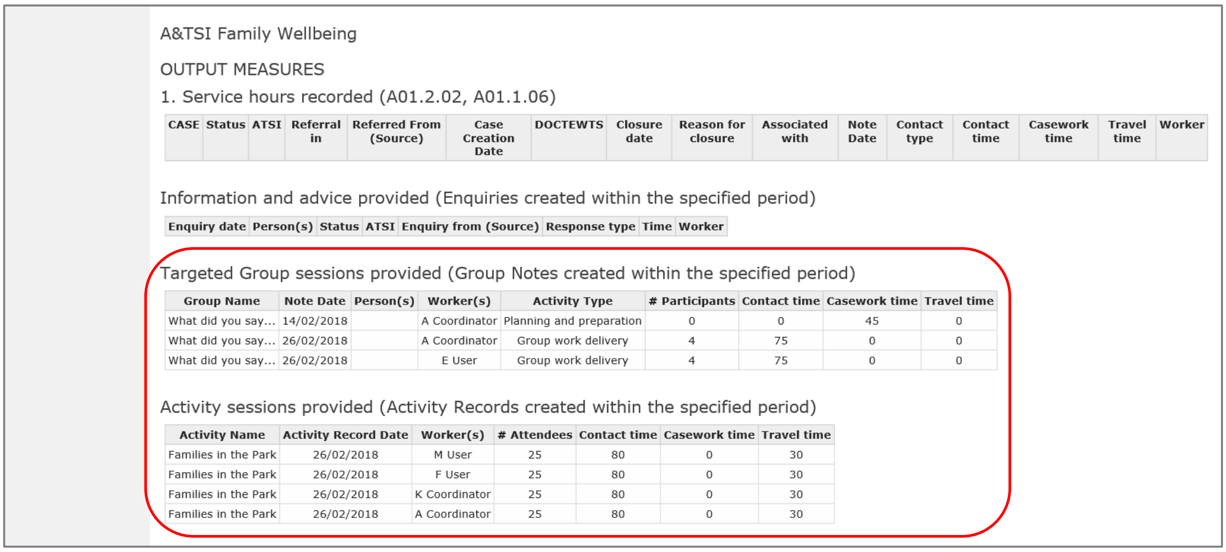
ARC PERFORMANCE REPORT (A&TSI Family Wellbeing)

Report Information	
Service Name	FW Training 2
Service Outlet Number	1009
Organisation Name	
Service Type No	T313
Service Type	A&TSI Family Wellbeing
Service Type Name	Support - Aboriginal and Torres Strait Islander Family Wellbeing
Reporting Period Start Date	01/02/2018
Reporting Period End Date	26/02/2018

A&TSI Family Wellbeing OUTPUT MEASURES

1. Service hours recorded (A01.2.02, A01.1.06)	Contact hours	Case Work hours	Travel hours	Total hours
Accommodation support	0	0	0	0
Appointment	0	0	0	0
Case coordination	0	0	0	0
Client meeting	0	0	0	0
Correspondence	0	0	0	0
Drop In	0	0	0	0
File Note	0	0	0	0
Group Work	0	0	0	0
Home visit	0	0	0	0
Informal interaction	0	0	0	0
In-home Support	0	0	0	0
Meeting	0	0	0	0
Phone	0	0	0	0
Transport	0	0	0	0
Information and advice provided (Enquiries created within the specified period)	0	0	0	0
Targeted Group sessions provided (Group Notes created within the specified period)	2.5	0.8	0	3.3
Activity sessions provided (Activity Records created within the specified period)	5.3	0	2	7.3
Total	7.8	0.8	2	10.6

2. The **ARC Performance List** provides the detailed records for that period ie. individual Group Notes and Activity Records.



A&TSI Family Wellbeing

OUTPUT MEASURES

1. Service hours recorded (A01.2.02, A01.1.06)

CASE	Status	ATSI	Referral in	Referred From (Source)	Case Creation Date	DOCTEWTS	Closure date	Reason for closure	Associated with	Note Date	Contact type	Contact time	Casework time	Travel time	Worker

Information and advice provided (Enquiries created within the specified period)

Enquiry date	Person(s)	Status	ATSI	Enquiry from (Source)	Response type	Time	Worker

Targeted Group sessions provided (Group Notes created within the specified period)

Group Name	Note Date	Person(s)	Worker(s)	Activity Type	# Participants	Contact time	Casework time	Travel time
What did you say...	14/02/2018		A Coordinator	Planning and preparation	0	0	45	0
What did you say...	26/02/2018		A Coordinator	Group work delivery	4	75	0	0
What did you say...	26/02/2018		E User	Group work delivery	4	75	0	0

Activity sessions provided (Activity Records created within the specified period)

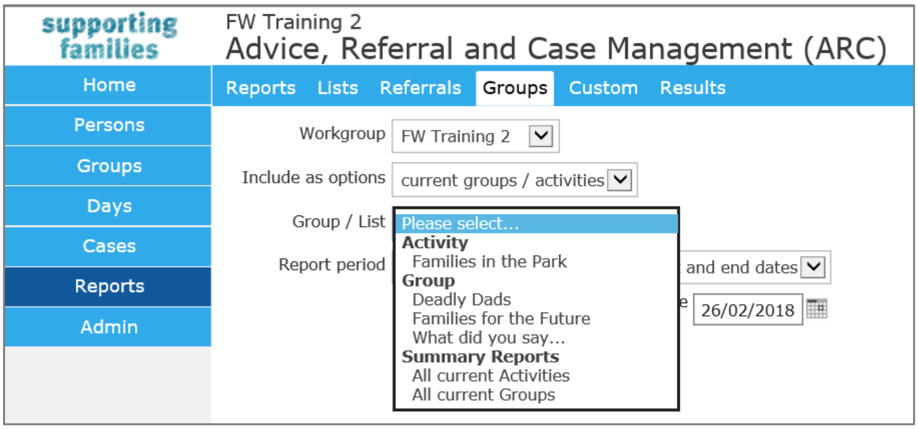
Activity Name	Activity Record Date	Worker(s)	# Attendees	Contact time	Casework time	Travel time
Families in the Park	26/02/2018	M User	25	80	0	30
Families in the Park	26/02/2018	F User	25	80	0	30
Families in the Park	26/02/2018	K Coordinator	25	80	0	30
Families in the Park	26/02/2018	A Coordinator	25	80	0	30

3. The **OASIS Report** includes the time from Group Notes and Activity Records for the specified period in the *Number of hours* measure. The detailed records are displayed I the **OASIS List**.

OUTPUTS

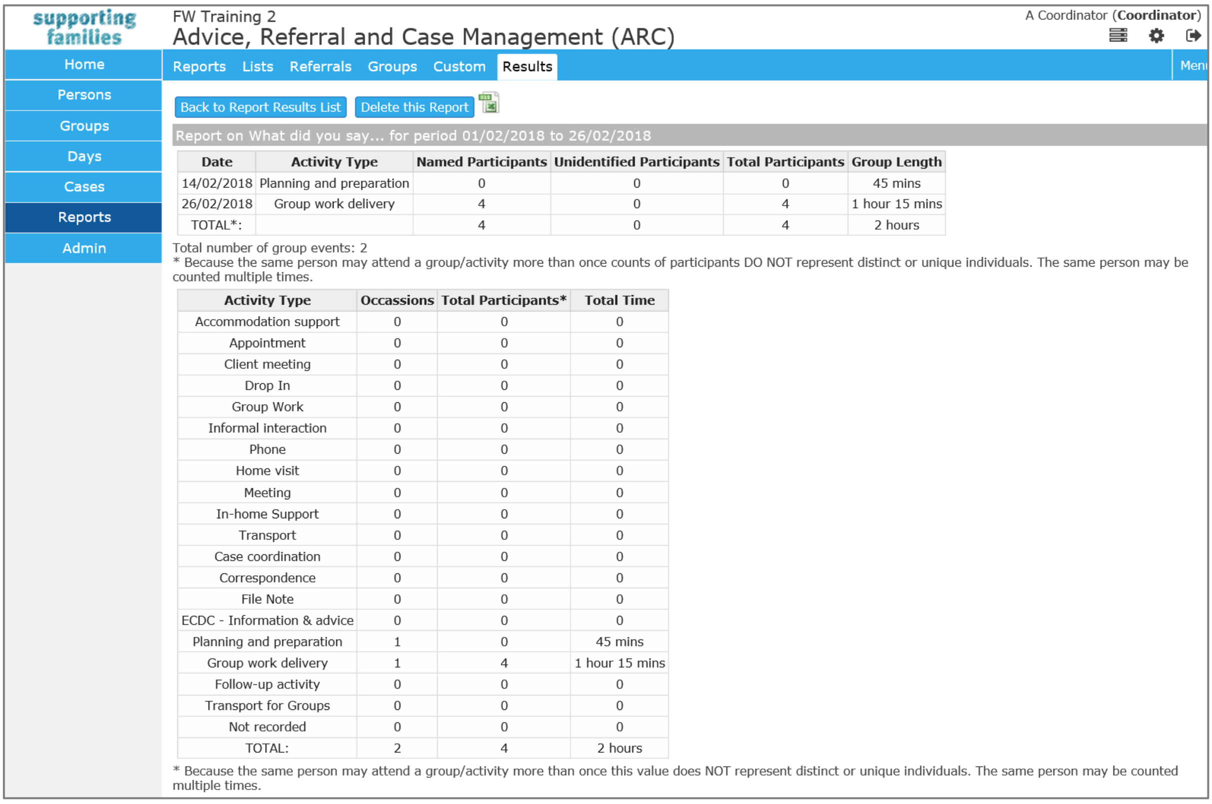
Measure No.	Measure Name	Response
A01.2.02	Number of hours provided during the reporting period	11
A01.2.02	Number of Service Users who received a service during the reporting period	0

4. A report is also available from the **Reports** page, **Groups** tab.
   Select the required report options and click **Generate report**.



..

This report presents the individual records for your requested Group or Activity by date, as below.



Report on What did you say... for period 01/02/2018 to 26/02/2018

Date	Activity Type	Named Participants	Unidentified Participants	Total Participants	Group Length
14/02/2018	Planning and preparation	0	0	0	45 mins
26/02/2018	Group work delivery	4	0	4	1 hour 15 mins
TOTAL*:		4	0	4	2 hours

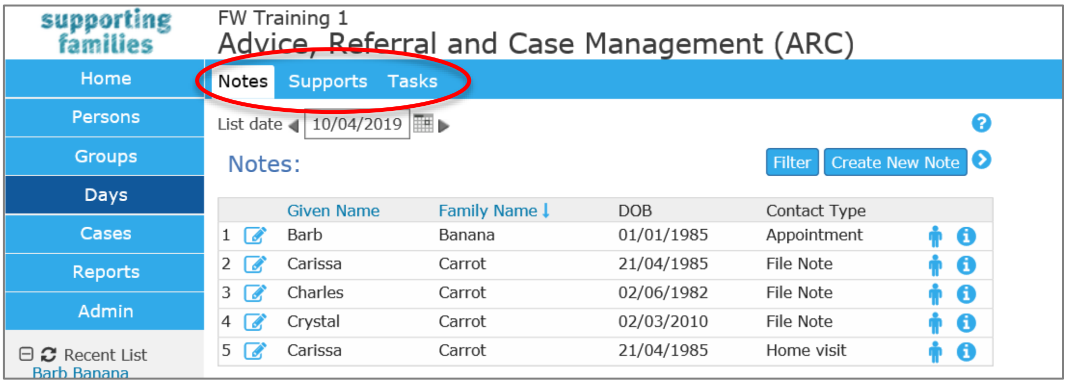
Total number of group events: 2
* Because the same person may attend a group/activity more than once counts of participants DO NOT represent distinct or unique individuals. The same person may be counted multiple times.

Activity Type	Occassions	Total Participants*	Total Time
Accommodation support	0	0	0
Appointment	0	0	0
Client meeting	0	0	0
Drop In	0	0	0
Group Work	0	0	0
Informal interaction	0	0	0
Phone	0	0	0
Home visit	0	0	0
Meeting	0	0	0
In-home Support	0	0	0
Transport	0	0	0
Case coordination	0	0	0
Correspondence	0	0	0
File Note	0	0	0
ECDC - Information & advice	0	0	0
Planning and preparation	1	0	45 mins
Group work delivery	1	4	1 hour 15 mins
Follow-up activity	0	0	0
Transport for Groups	0	0	0
Not recorded	0	0	0
TOTAL:	2	4	2 hours

* Because the same person may attend a group/activity more than once this value does NOT represent distinct or unique individuals. The same person may be counted multiple times.

16 Days

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



Additional guidance about this page is also available from Online Help

16.1 Navigating within the Days Page

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

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

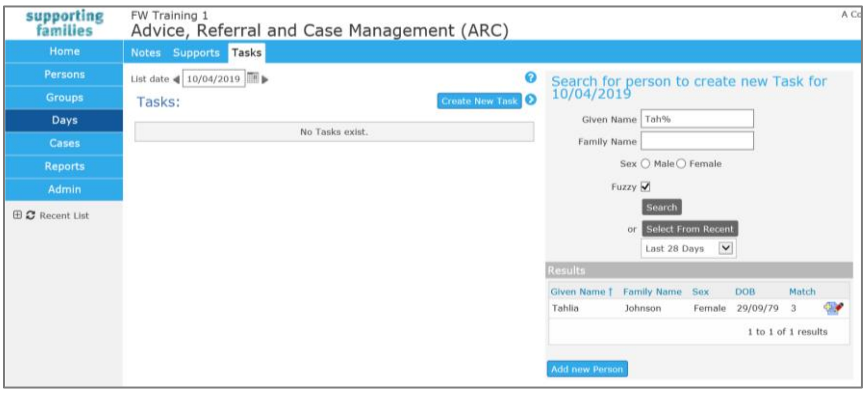
Click the icon to open the record. Click the icon to open the **Person** record.

Hovering over the information icon displays a summary of the record's information. The Filter 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.

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

1. From each tab, you are able to create a new record – for Notes, Supports, Tasks respectively. Click **Create New <Note/Support/Task>.** The **Search for person** form will appear to the right of screen (see image above) to identify the relevant Person for the record.
2. Complete as outlined in the Persons section and complete the record accordingly.



3. Click the icon beside the appropriate Person to create a new record.

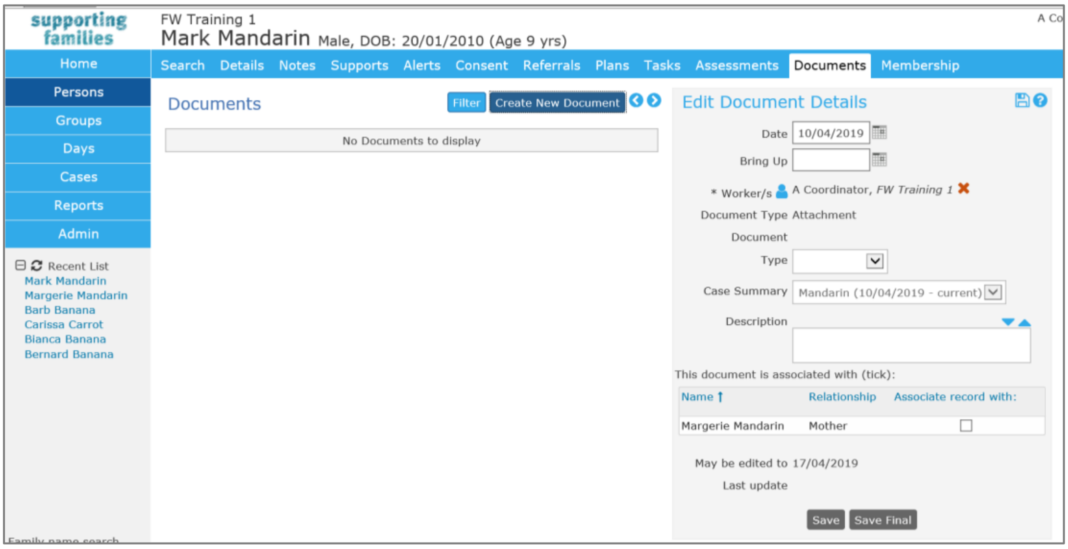
17 Documents

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

- Attachment - any file, up to a maximum of 5 MB, can be attached to a person record.
- Merge - 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 Administrator or Coordinator access level is able to create and edit merge document templates.

17.1 Attach and manage documents on the Person record

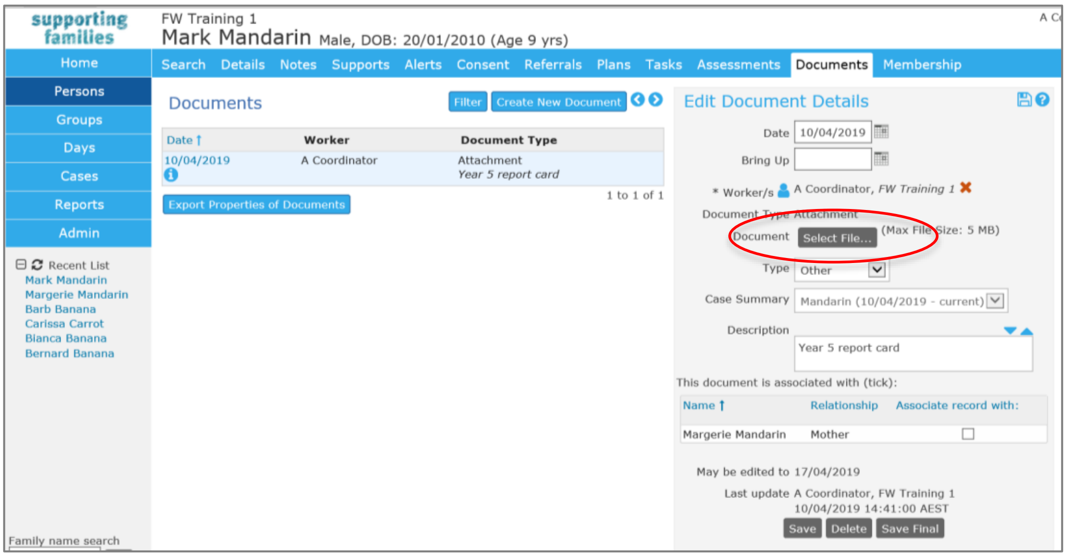
1. From the **Persons** page, select the **Documents** tab.
2. Click **Create New Document** and the Edit Document Details form will appear to the right of screen.



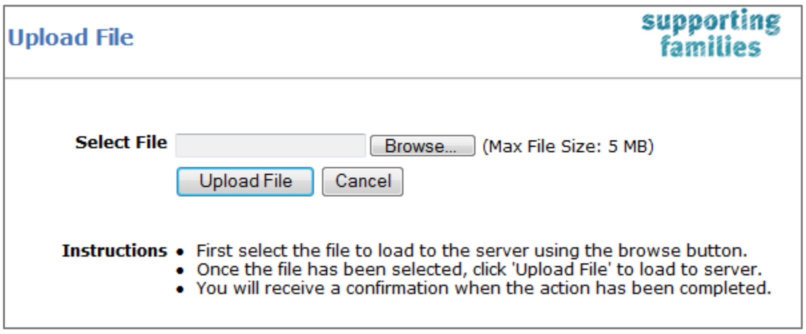
3. Select the **Date** by clicking the calendar icon – defaults to today's date.
4. Enter the **Bring Up** (review) date by clicking the calendar icon, if required.
5. Click the **Worker/s** icon to add additional workers, if this is relevant.
6. Select **Type** from drop down list : Referral, Assessment,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

   The Case Summary field auto-populates the current Case Summary for this Person.
   NOTE : Documents relevant to the **Case / Case Summary** should be attached to the **Case Summary** record.
7. Add a **Description** of the document. (This description will be displayed in the Documents list).
8. Click **Save**.

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



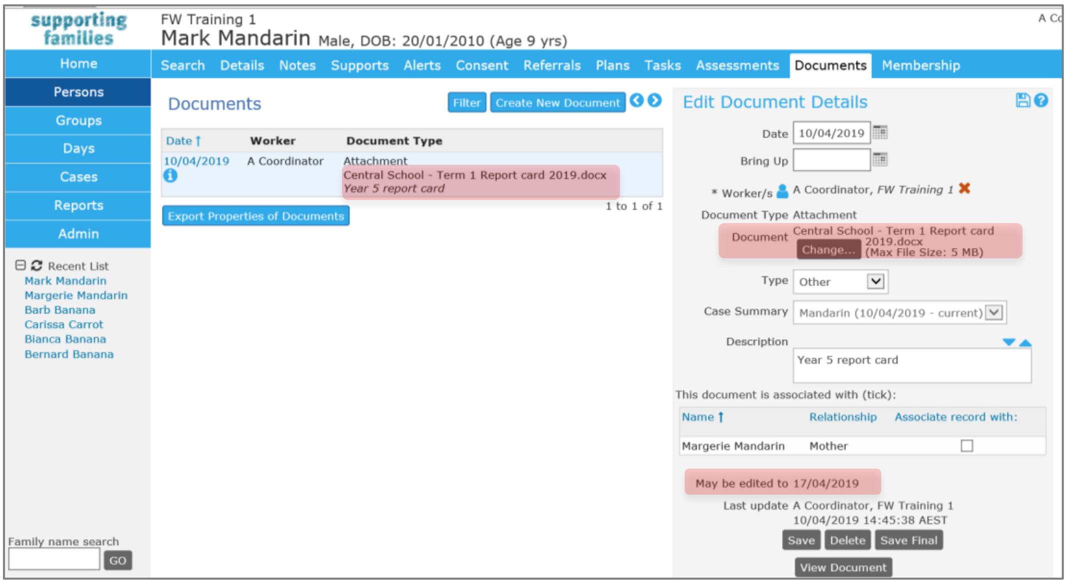
9. Click **Select File...** and the following dialog box will appear.



10. Click **Browse** and locate the file you would like to upload.

11. Click **Up Load File**. The document will be attached to the person record and the filename will be displayed in the Document field.

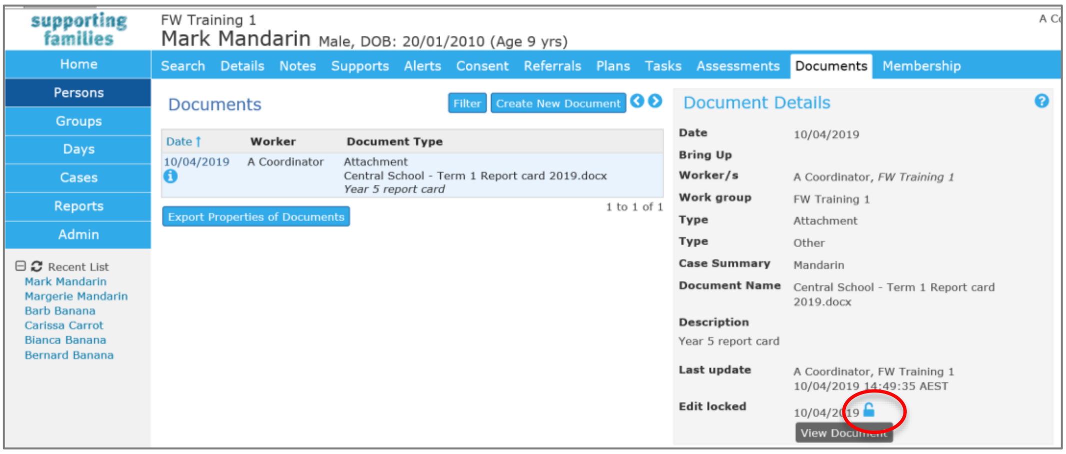
12. Click **Save**.



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.

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

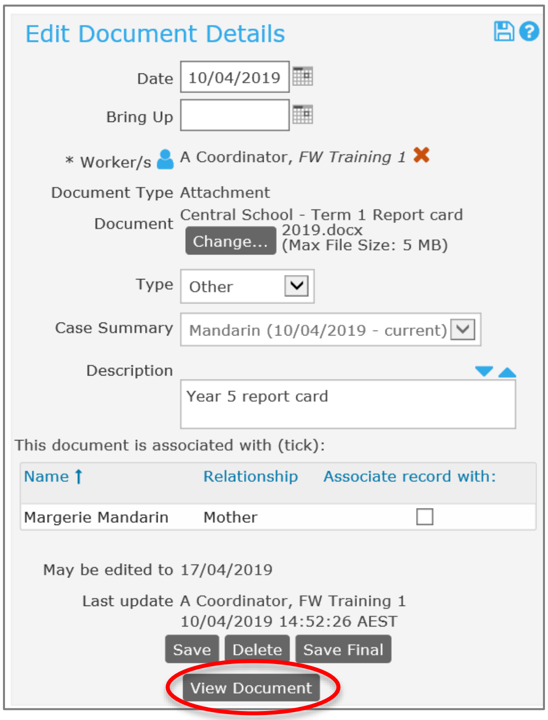


Users with Coordinator access are able to unlock locked records by clicking on the blue unlock icon.

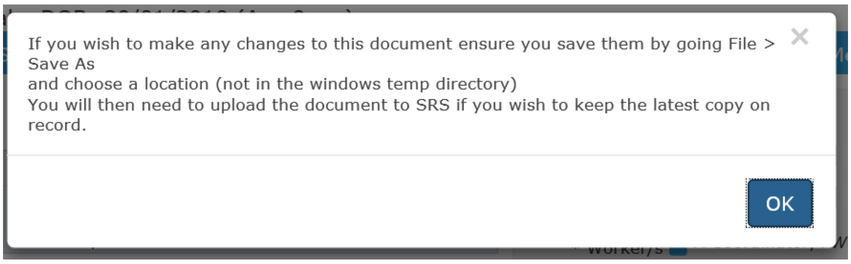
17.2 Viewing & Changing Documents

17.2.1 To view the document

1. Click **View Document**.



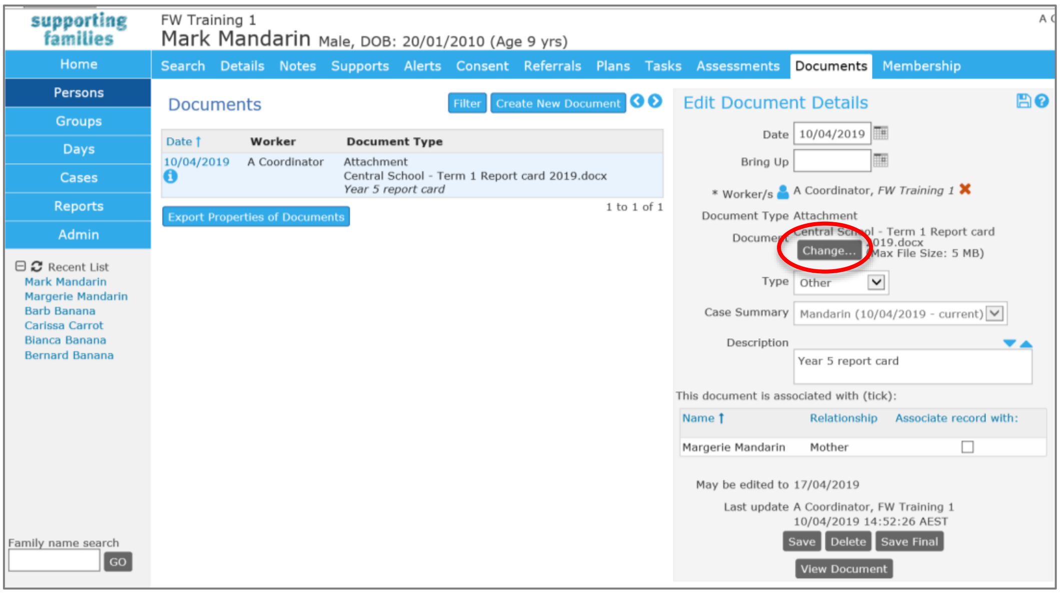
The following message will pop-up :



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

17.2.2 To change the document:

1. Click the document date displayed in blue and the **Edit Document Details** form will appear to the right of screen.
2. Next to Document you will see the name of the current attachment.
3. Click **Change**... and locate the required new file via the dialog box.



4. The new document will be attached to the client record and the filename will be displayed in the Document field. The old document will be removed.
5. Click **Save** to save the document or **View Document** to view the document before saving.

17.3 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.

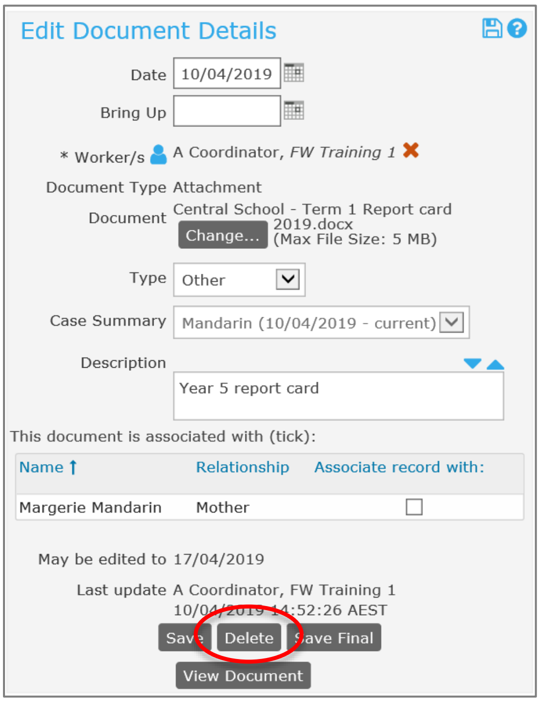
Note that the merge document option will only be shown if merge templates have already been created for your organisation.

Additional Notes:

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

17.4 Deleting Documents

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



18 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.

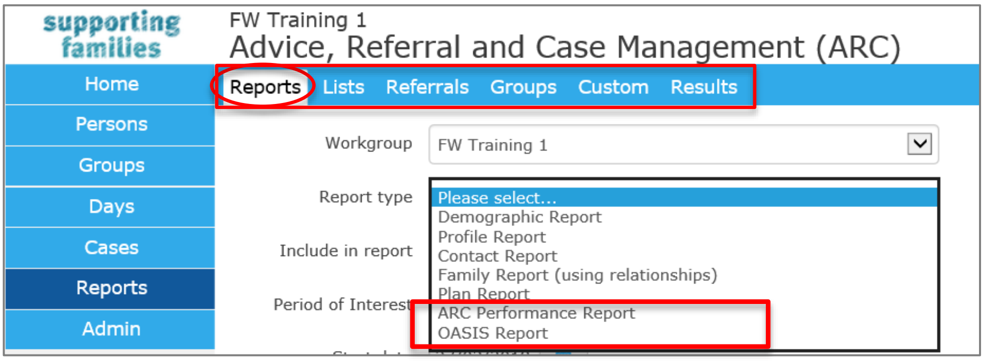
There are a number of distinct tabs within the Reports Page identifying the different report categories: Reports, Lists, Referrals, Groups, Custom and Results.

Users with Normal and Coordinator access profiles can view all tabs.

18.1 Reports

Different reports can be accessed from the tabs within the **Reports** page.

18.1.1 Reports tab



On **Reports** Page, **Reports** tab, you can generate a number of reports. Some are generic to the SRS product.

The ***ARC Performance Report*** and ***OASIS Report*** have been specifically developed to streamline reporting requirements for services.

ARC Performance Report

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

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

OASIS Report

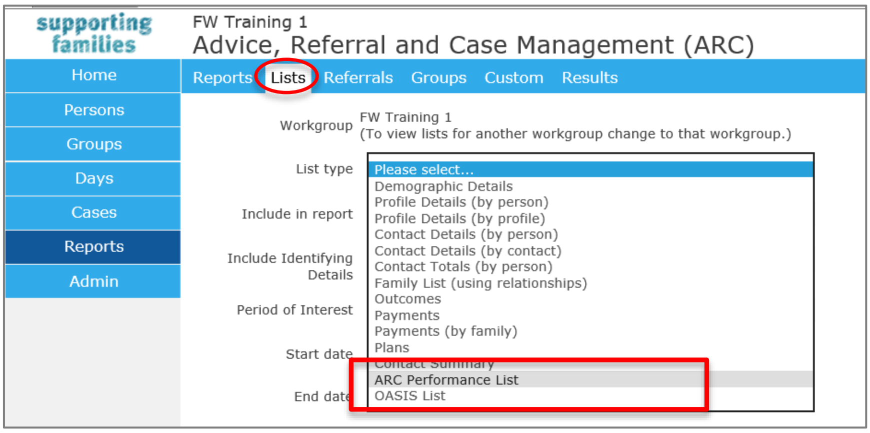
The *OASIS Report* is used for satisfying performance-based acquittal obligations of services. The format of the report is exactly the same format as required to be entered into OASIS by service providers.

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

The ***Counting Rules*** for each of the measures in the ***OASIS Report*** are included in Section 18.5 for your reference.

18.1.2 Lists tab

The **Lists** tab provides details of the individual records that have been used to generate the corresponding reports. The *List* results display detailed data corresponding to that reflected in the report. This feature allows you to format and analyse the data yourself via the Export function. (Refer section Exporting Report Results)



The ***ARC Performance List*** and ***OASIS List*** have been specifically developed to streamline reporting and data validation for services. These *Lists* return the detailed data pertaining to each of the records reflected in the corresponding report, as run for the same period. A review of this data enables you to verify and validate the reports for your service.

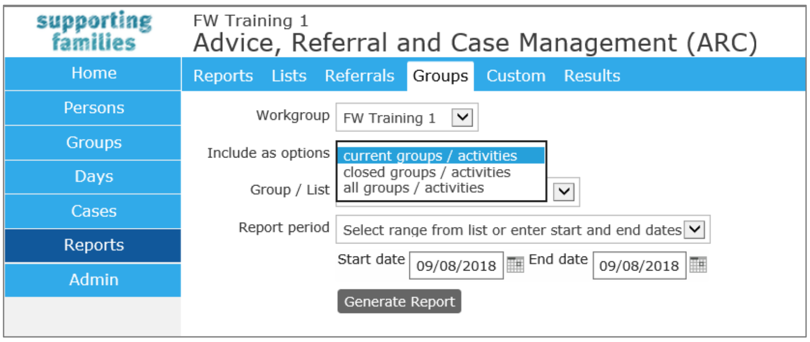
18.1.3 Referrals tab

The Referrals tab allows you to generate reports for a specified period about :

- Referrals *sent* by your service
- Referrals *received* by your service.

18.1.4 Groups tab

The Groups tab allows you to generate reports for a specified period about Groups and Activities conducted (recorded) within your service:



18.1.5 Custom tab

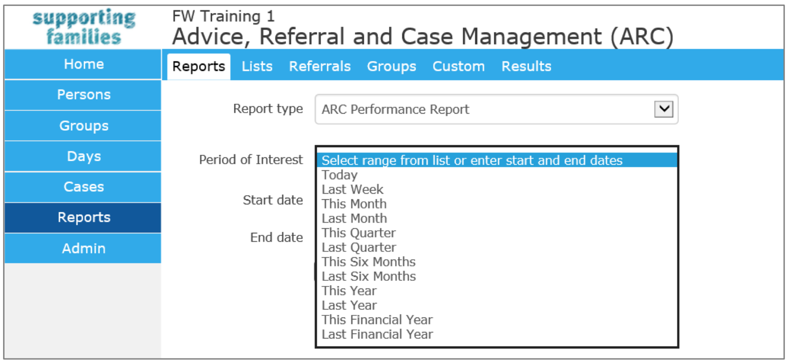
This is standard functionality from the Infoxchange SRS product. It is generic to all SRS systems and not specific to ARC. For guidance on using this feature, click on the Help icon to access SRS Help or review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides

Custom Reports provide a variety of different ways to aggregate data, allowing users more flexibility in their 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.

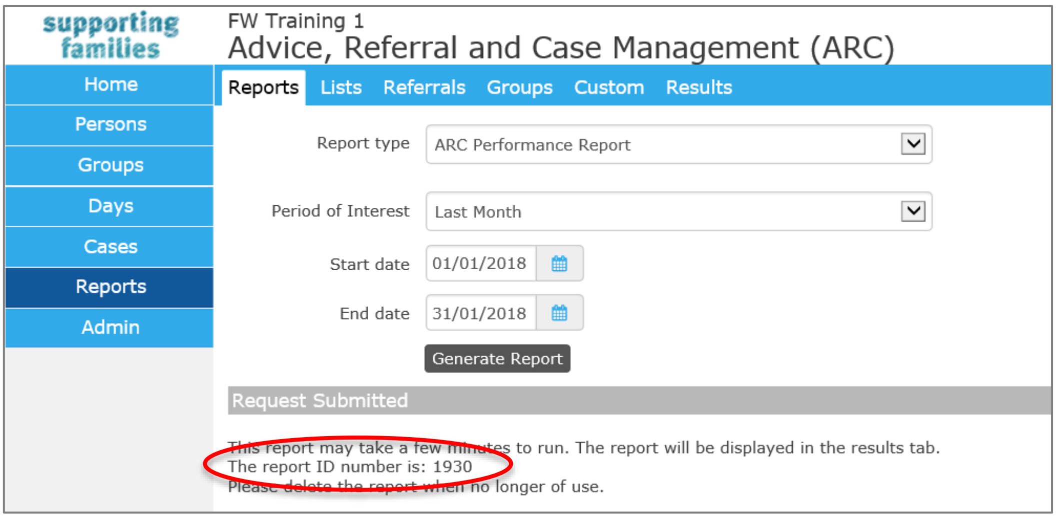
18.2 Generating Reports

1. On the **Reports** page, **Reports** tab, select your **Workgroup** and the **Report type**.

2. Select period range from the **Period of Interest** drop down menu. Alternatively, you can use the calendar icon to select a Start date and End date.



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



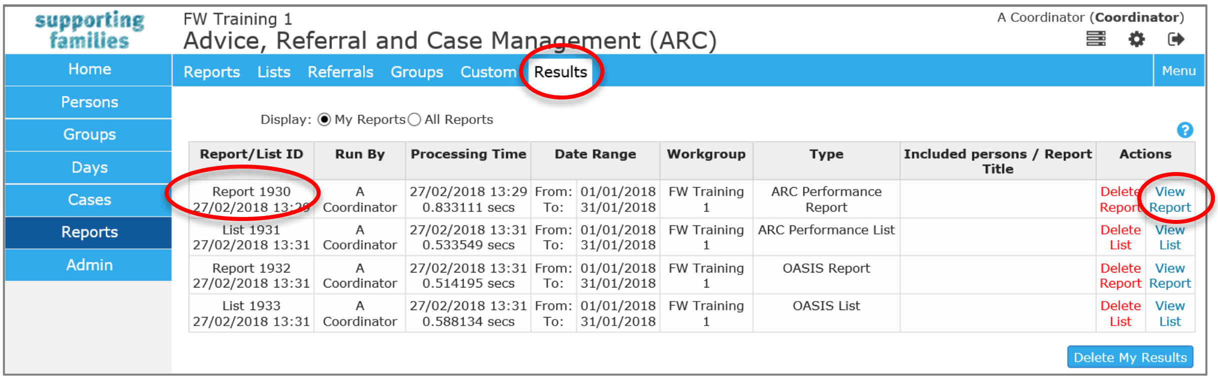
The report can be accessed from the **Results** tab using the report ID number (highlighted above).

18.3 Viewing Report Results

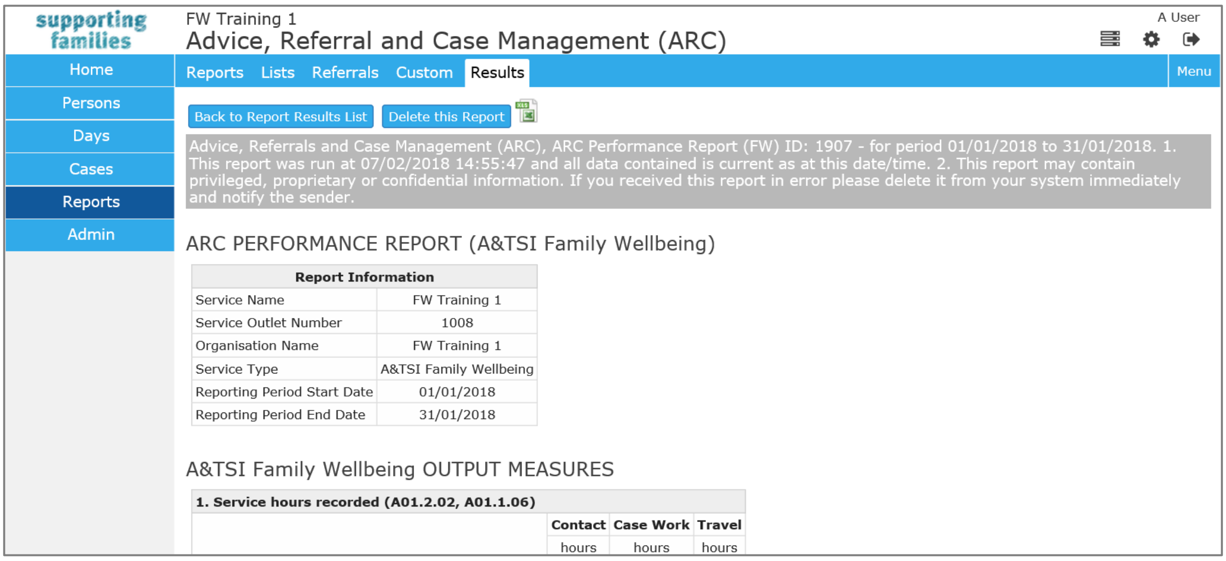
The **Results** tab allows you to view and delete reports generated through the Report tabs.

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).



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

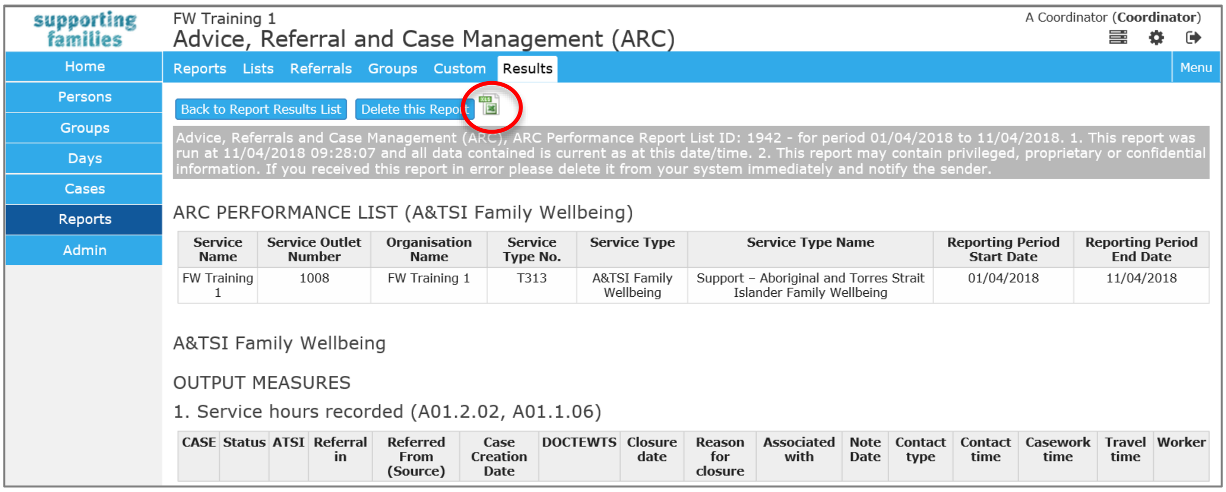


1. To delete a report from the **Results** tab, simply click Delete Report.
2. A pop-up message will appear - click **OK** to delete the report or **Cancel** to retain the report.

18.4 Exporting Report Results

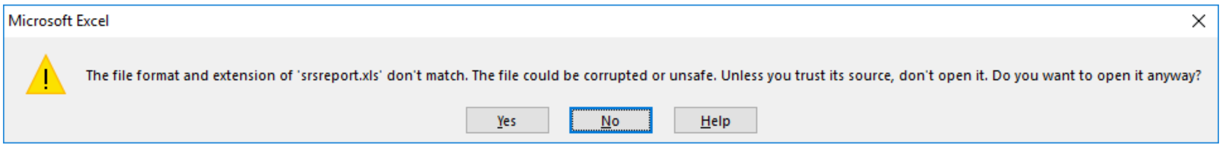
Reports are able to be exported to Excel. This enables users to perform their own analysis of the data and to use it in other ways.

1. From the View Report screen, as above, click the **Excel** icon.

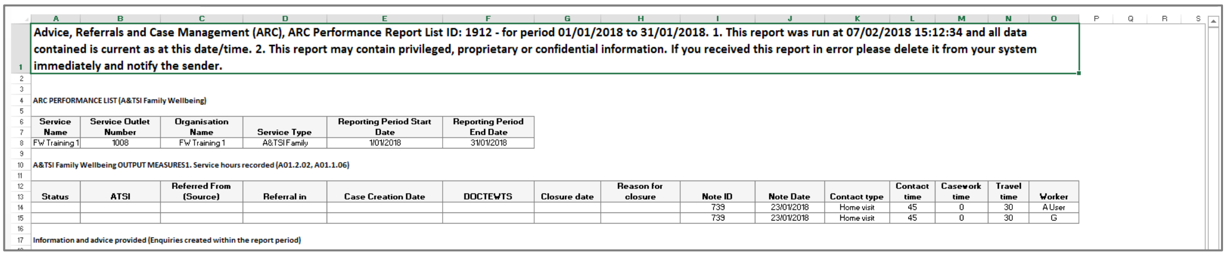


2. A prompt will appear at the bottom of your screen - select either **Open**, **Save** or **Cancel.**

   The message below may then appear – click **Yes**.



The results are displayed in Excel. These can then be sorted / analysed for any specific information you may require.



18.5 OASIS Report – Counting Rules

The following tables provide the counting rules defined for the A&TSI Family Wellbeing services for the measures allocated within the *Families Investment Specification*.

Important to note: An ***active*** *Case Summary* is one where the *Date of Parent / Carer consent to engage with the service* has been recorded and the Case Summary is not closed.

PERFORMANCE

Measure No.	Measure Name	Counting rule
GM07	Number of Service Users with cases closed as a result of majority of identified needs being met	Each Case Summary closed within the reporting period and a Case Plan Goals Met reason of *Case Plan Goals Met* OR *Partial Needs met.*
IS35	Number of Service Users identifying as Aboriginal and/or Torres Strait Islander	Each active Case Summary 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 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	Each Case Summary with a *Date of Parent / Carer consent to engage with the service* 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 Case Summary closed within the reporting period and a *Date of Parent / Carer consent to engage with the service* was populated
IS201	Number of referrals received	Each Case Summary with a *Referral Date (for this service*) within the reporting period

… continued

OUTCOMES

Measure No.	**Measure Name**	**Counting rule**
OM2.1.01	Number of Service Users that have shown improvements in being safe and/or protected from harm	Count each Case Summary that has been closed during the reporting period with a Case plan goals met value of *Case plan goals met* OR *partial needs met* AND has had an *Initial* and a *Closing* WELLBEING DOMAINS Assessment completed AND the total score against the CLOSING assessment is HIGHER than the INITIAL assessment score AND a 3 or higher (Adequate or above) is recorded against the *Family Safety* DOMAIN in the CLOSING Assessment, where the INITIAL Assessment recorded a 1 or 2. 1 = Challenge, 3 = Adequate, 5 = Strength
OM2.1.02	Number of Service Users with improved cultural identity/ connectedness	Count each Case Summary that has been closed during the reporting period with a Case plan goals met value of *Case plan goals met* OR *partial needs met* AND has had an *Initial* and a *Closing* WELLBEING DOMAINS Assessment completed AND the total score against the CLOSING assessment is HIGHER than the INITIAL assessment score AND a 3 or higher (Adequate or above) is recorded against the *Cultural identity / connectedness* DOMAIN in the CLOSING Assessment, where the INITIAL Assessment recorded a 1 or 2. 1 = Challenge, 3 = Adequate, 5 = Strength
OM2.1.08	Number of Service Users with improved life skills	Count each Case Summary that has been closed during the reporting period with a Case plan goals met value of *Case plan goals met* OR *partial needs met* AND has had an *Inital* and *Closing* WELLBEING DOMAINS Assessment AND the total score against the CLOSING assessment is HIGHER than the INITIAL assessment score AND a 3 or higher (Adequate or above) is recorded in the CLOSING assessment (being a change from the Inital assessment) against 2 or more DOMAINS (excluding *Family Safety*). 1 = Challenge, 3 = Adequate, 5 = Strength

… continued

OUTPUTS

Measure No.	**Measure Name**	**Counting rule**
A01.2.02	Number of hours provided during the reporting period	Sum the total minutes of unique Notes* created within the reporting period (x number of key workers associated) excluding those with an *Activity Type* of 'ECDC – Information & Advice' **+** Sum of total (cumulative) minutes for Enquiries created within the specified period, excluding those with a *Response type* pertaining to ECDC **+** Sum the total minutes for unique* Group Notes created within the specified period (x the number of workers associated) *Unique Note : if a note is associated with a number of Persons, it is only counted once.
A01.2.02	Number of Service Users who received a service during the reporting period	The number of active Case Summaries that are open at the end of the reporting period **+** Case Summaries closed during the reporting period where *Case Plans goals met* does not equal *Early Exit*.
A07.2.02	Number of hours provided during the reporting period – community development, coordination and support	Sum the total minutes for each **Activity Record** created within the specified period (x the number of workers associated).
A07.2.02	Number of Service Users who received community development, coordination and support during the reporting period	**This needs to be manually calculated.** From the ***OASIS List***, review the details for the above result (A07.2.02 - Number of hours) and for each Activity held during the reporting period, identify the number of Attendees. This total of Attendees for each Activity held represents the Number of Service Users for this measure.

ECDC OUTPUTS

Measure No.	**Measure Name**	**Counting rule**
A01.1.06	ECDC - Number of hours provided during the reporting period	Sum the total minutes for unique Notes* with an *Activity Type* of 'ECDC – Information & Advice' created within the specified period (where time is multiplied by the number of service workers attached to the note) AND Sum the total minutes for Enquiries created within the specified period with the following *Response type*:

		‘ECDC – Information & Advice’, ‘ECDC – Family Wellbeing staff training’, ‘ECDC – Sector Development’. * Unique Note : if a note is associated with a number of Persons, it is only counted once.
A01.1.06	ECDC - Number of Service Users who received a service during the reporting period	The number of ECDC Profile records that are open at the end of the specified period + ECDC Profile records closed within the specified period.

Please note : For Other Measure : **GM01 - Number of occasions that information, advice and referral services were provided (not provided elsewhere).**

GM01 has <u>not</u> been defined to be included in the **OASIS Report** generated from ARC as this measure refers to things not captured in ARC. This measure is not scrutinised by the department and is provided to enable services to reflect non-client related contacts, <u>IF</u> you keep track of them outside of ARC. If a separate record of these (random) things is not maintained, then the answer is “0”. There is no right/wrong answer.

19 Admin Page

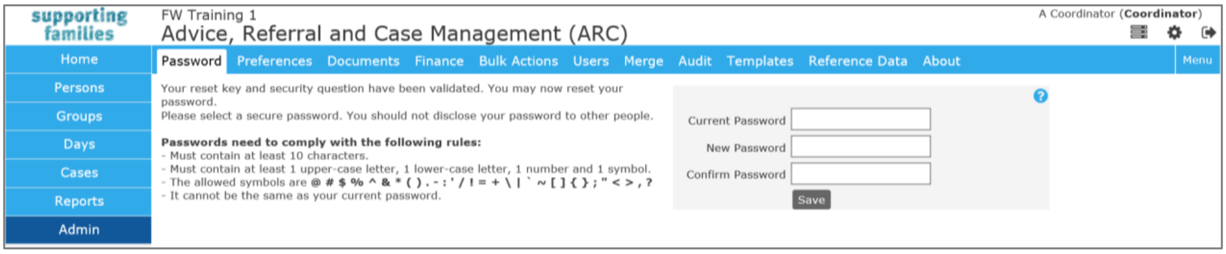
The tabs within the **Admin** page allow users to manage their logon, email address and other details used within ARC.

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

19.1 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 and contain 1 upper case, 1 lower case, 1 numeric character and 1 special character.
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.

19.2 User Preferences

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

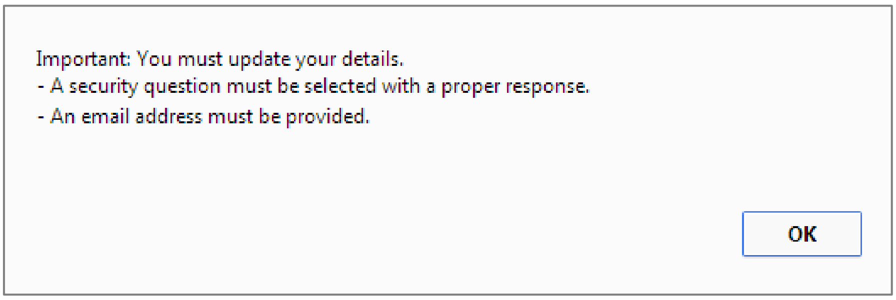
When logging on to ARC for the first time, users will be directed to the **Preferences** tab to update their Email Address**,** Security question **and** Security response**.**

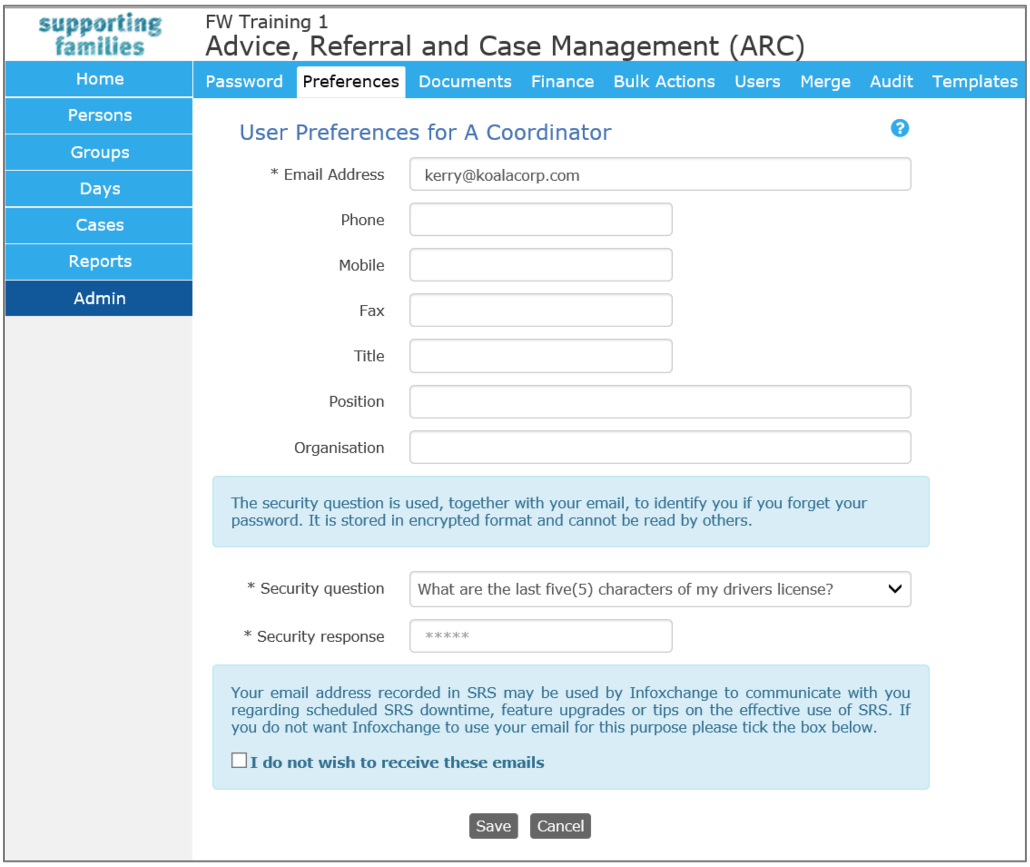
This information is used for identification should users forget their passwords and wish to make use of the Password Resetting function. Alternatively, your ARC Coordinator will be able to reset passwords.

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.

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

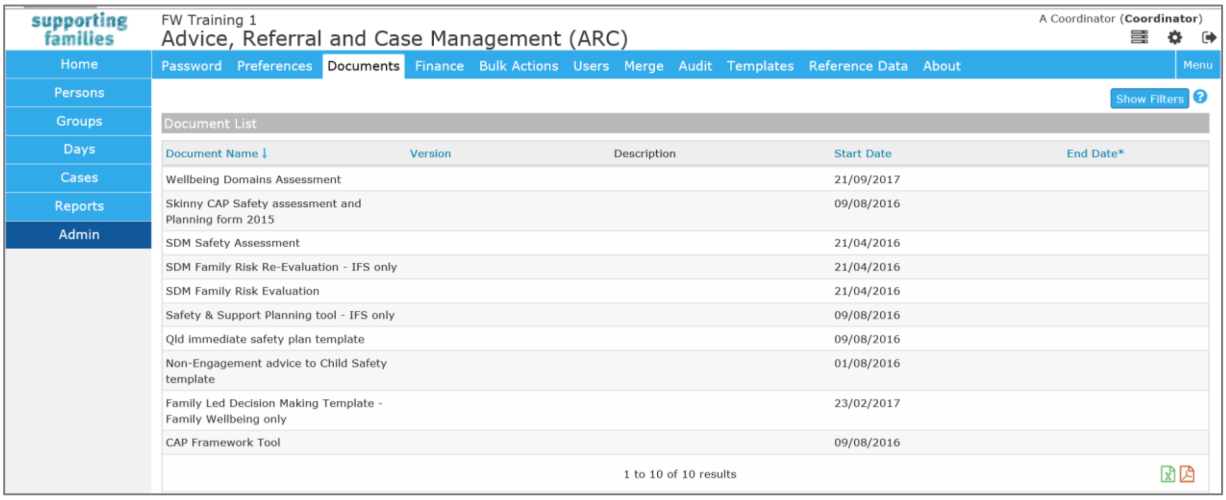




19.3 Documents

The **Documents** tab within the **Admin** page provides access to a general document reference area. These documents are available to all workgroups in ARC.

These are documents or other files that do not pertain to an individual (Person) record.



The documents within the Documents tab can be accessed and printed by clicking on the **Document Name.**

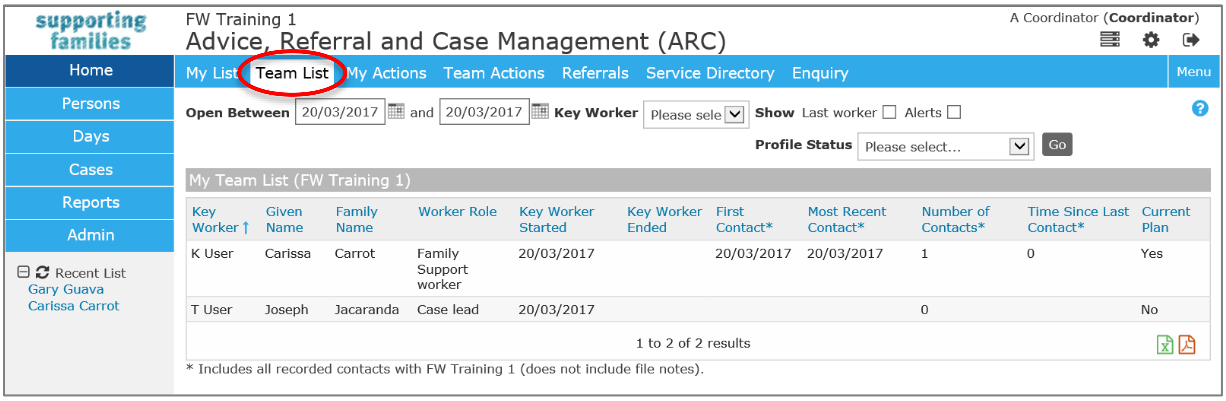
20 Coordinator Functions

The functions detailed within this section are only available to users with **Coordinator** access level.

20.1 Team List

The **Team List** tab on the **Home** page is used to view the list of Persons allocated within your Workgroup.

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



The following options can be used to customise your view:

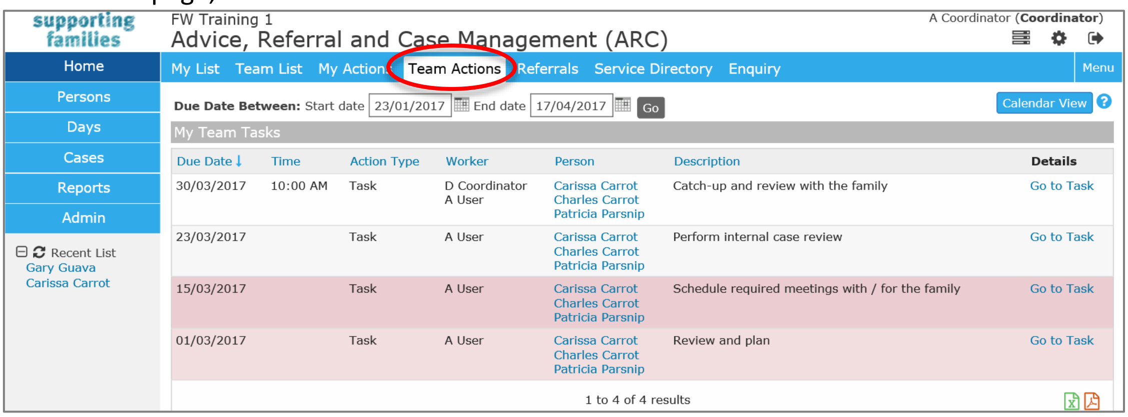
- By clicking the calendar icon and altering the displayed date range you can filter data by date.
- You can show additional details such as **Last Worker**, existing **Alerts** and **Profile Status** by clicking the options at the top of the form.
- To sort the list of Persons, click on the **Worker 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.

20.2 Team Actions

The **Team Actions** tab is used to view the list of actions within your Workgroup.

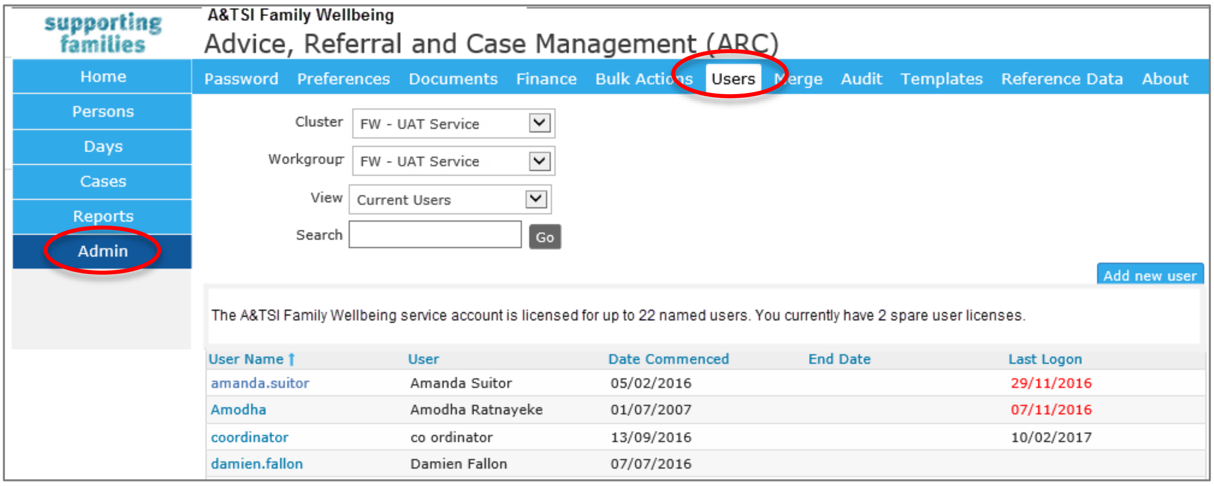
From the **Home** page, select the **Team Actions** tab.



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

20.3 User Management

The **Users** tab within the **Admin** page provides access to the User Management functions.



20.3.1 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, the Family Wellbeing service has 22 named users and 2 spare licences. This means there are currently 20 allocated users.

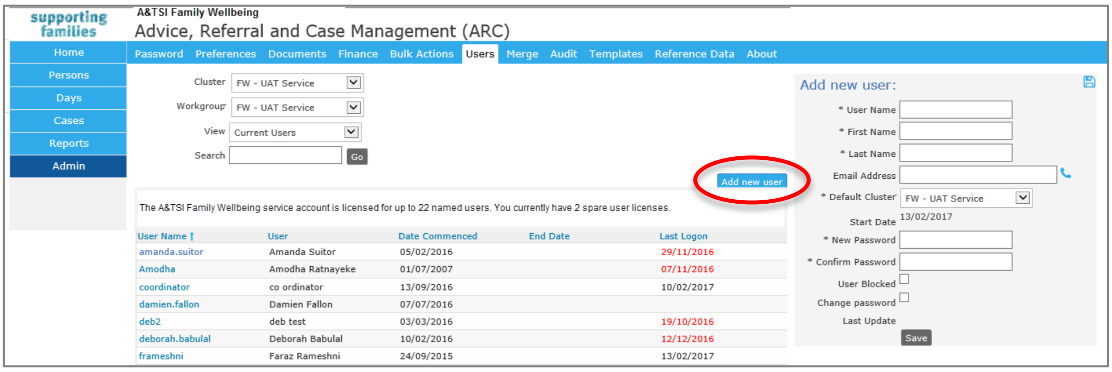
If you have no spare licences, the first step is to review the list of **Current Users** and see if there's anybody on that list who is unnecessarily allocated to your workgroup.

If you require additional licences, please contact the Aboriginal and Torres Strait Islander Program Team on familywellbeing@communities.qld.gov.au to discuss this requirement.

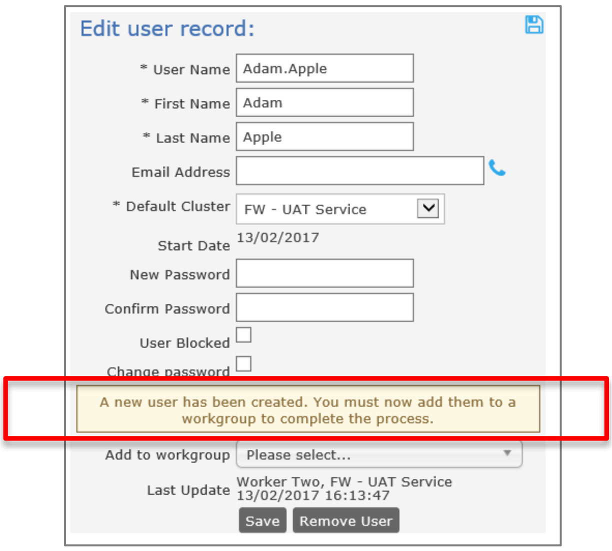
If you select ***Non Current Users***, you can view users who are inactive.

Step 2: Create a new User:

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



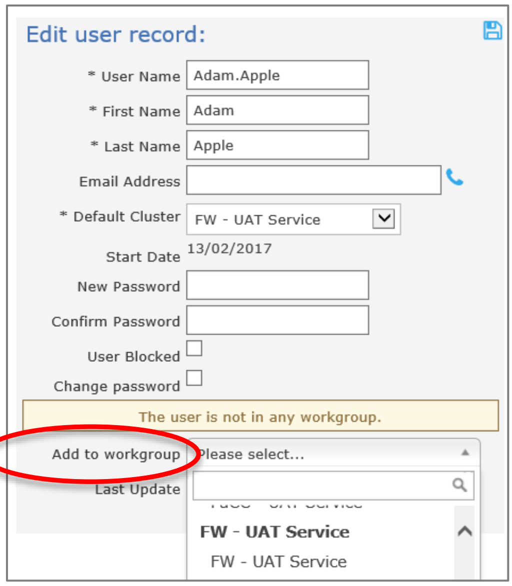
2. Enter the new **User Name** (User id). Please note that:
   - The **User Name** is case sensitive.
   - It is recommended that the naming convention of 'Firstname.Lastname' be followed. For example, if the user's name is John Smith, the new **User Name** should be 'John.Smith'.
   - The **User Name** 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 eight characters in length and contain both letters and numbers.
5. Ensure that the **User Blocked** checkbox is <u>not</u> ticked.
6. Tick the **Change Password** checkbox - this will force the user to change their password when they first log into ARC.
7. Click **Save**. The User account has been saved but there is a warning that the user has not been allocated to any Workgroup.



A User is not able to log into ARC until they have been allocated to a workgroup. Until they are allocated to a Workgroup, they are not using one of the licences. In this example, 2 spare licences will continue until this user has been allocated to a Workgroup.

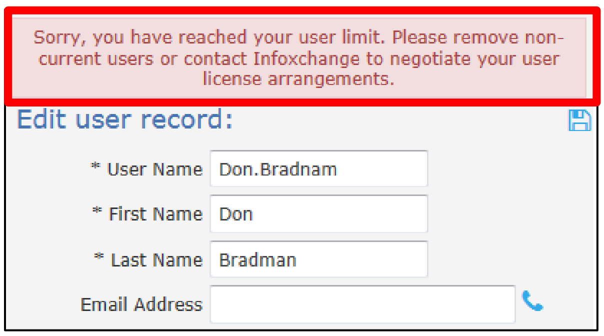
Step 3: Allocate to a workgroup:

8. Make a selection from **Add to workgroup** list (highlighted below) and click **Save**.



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.

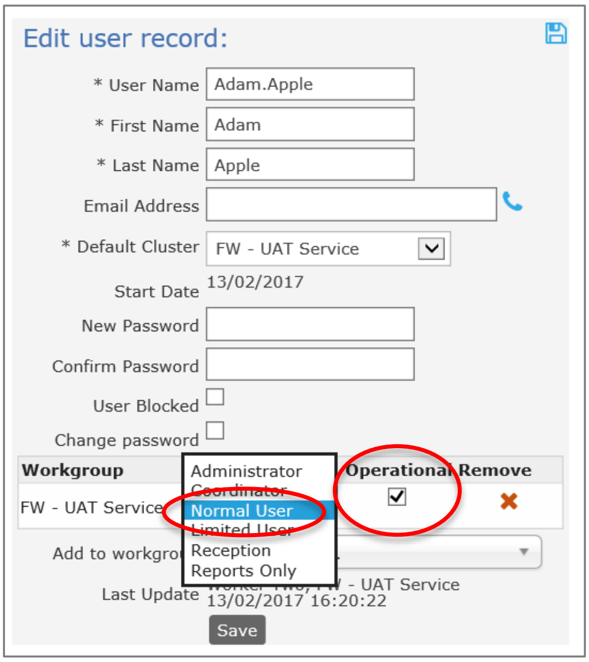


Step 4: Allocate the access level:

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	Co-ordinator
Create Person and Relationships	✓	✓
Delete Person	×	×
Activate Restricted Access	×	✓
User restricted from accessing Person records	✓	×
Create Case Summary	✓	✓
Manage Case Summary (add notes, payments, consent, plans, assessments, documents etc)	✓	✓
Create Referrals	✓	✓
Create Enquiries	✓	✓
Unlock notes	×	✓
Delete notes, payments, plans etc	×	✓
Receive and manager Referrals	×	✓
Perform reporting - basic	✓	✓
Perform reporting - advanced	×	✓
Merge Person records	×	✓
Auditing	×	✓
Manage document templates	×	✓
Manage Users	×	✓



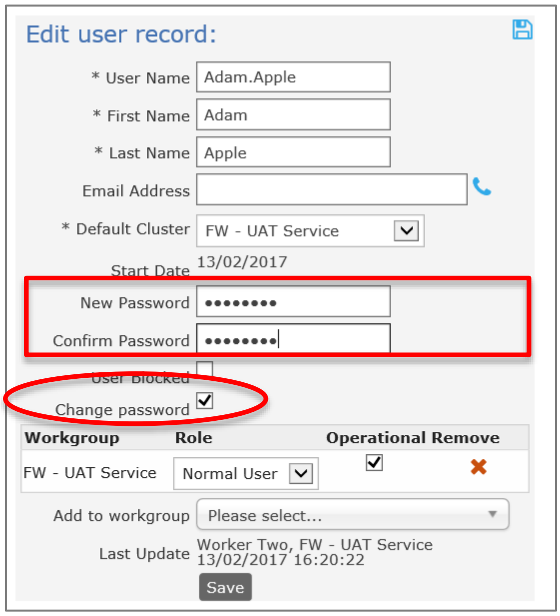
10. Where available, if the user needs access to another workgroup, make another selection from the **Add to workgroup** drop-down list and assign the required access level.

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.

20.3.2 Resetting a Password

To reset a user's password:

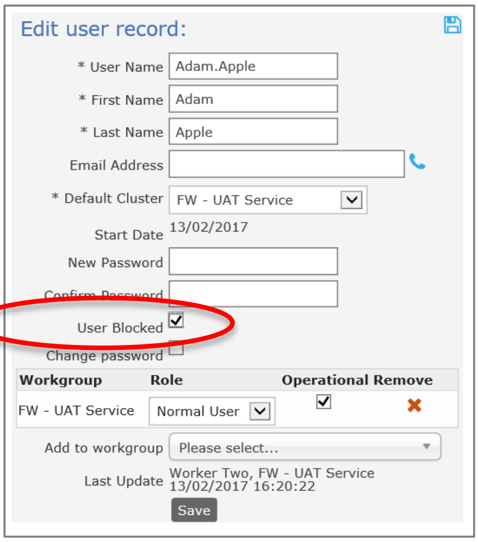
1. Open the **Edit user record** form by selecting the **User Name** from the list of Current Users.



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 <u>not</u> ticked.
4. Click **Save.**

20.3.3 Unblocking a User Account

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



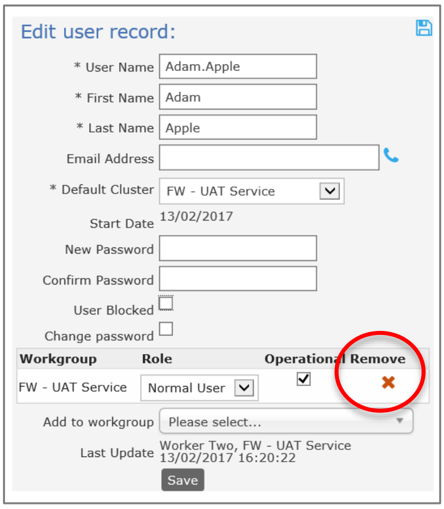
The user account can be unblocked by simply unchecking the **User Blocked** check box (highlighted above) and clicking **Save**.

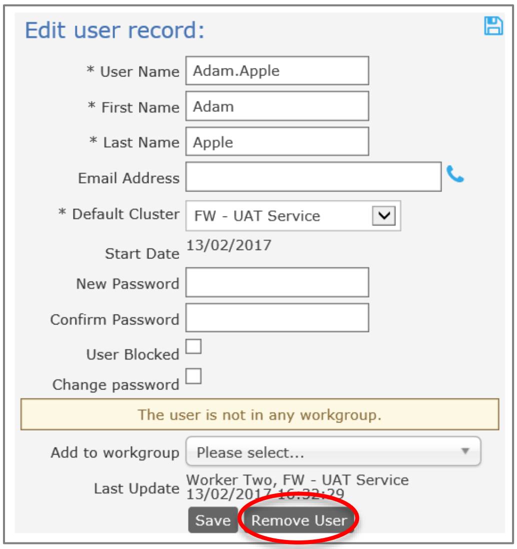
20.3.4 Removing User Access

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

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

2. Click the red cross to 'Remove'.





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 above.

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.

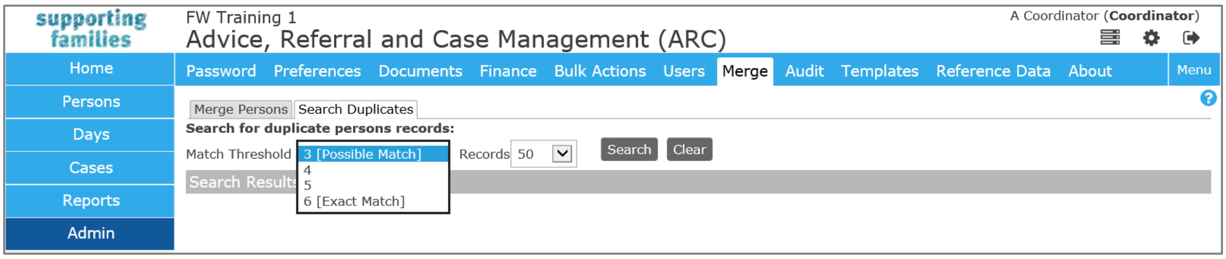
20.4 Merging Person Records

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.

20.4.1 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.

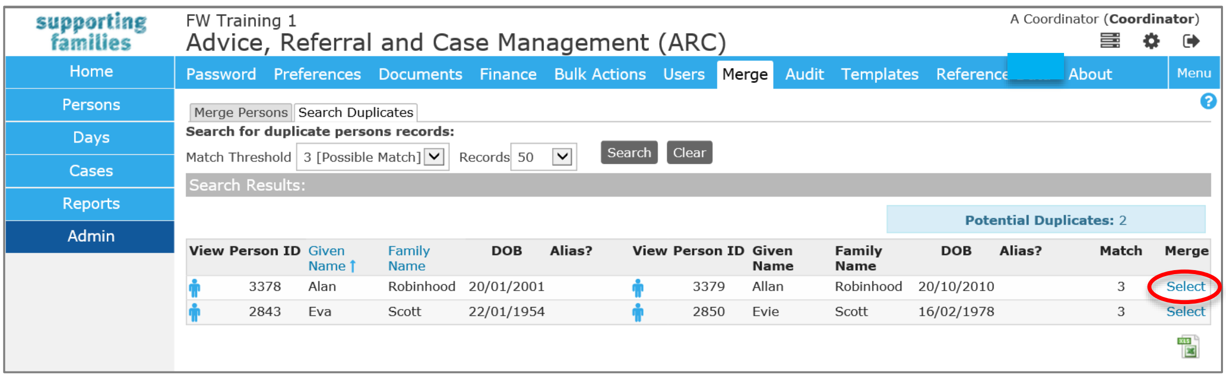


The **Match Threshold** field (displayed above) indicates the number of matching 'points' the Person records need to meet before they are selected and listed as possible duplicates. Matching occurs on the Given Name, Family Name and Date of Birth fields. Fuzzy name matching is also taken into consideration.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

<u>To perform the possible duplicates search:</u>

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.



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 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.

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

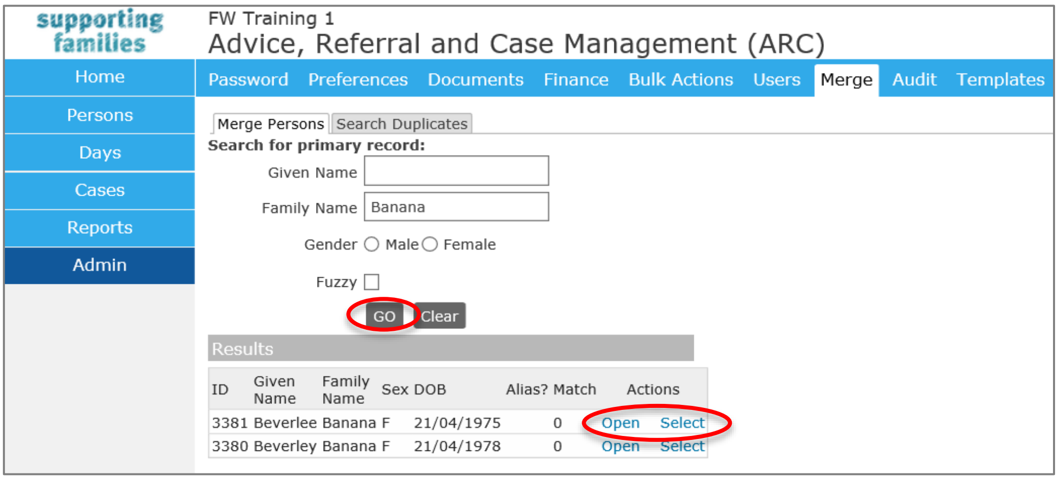
Additional Notes

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

20.4.2 To Merge two Person records

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

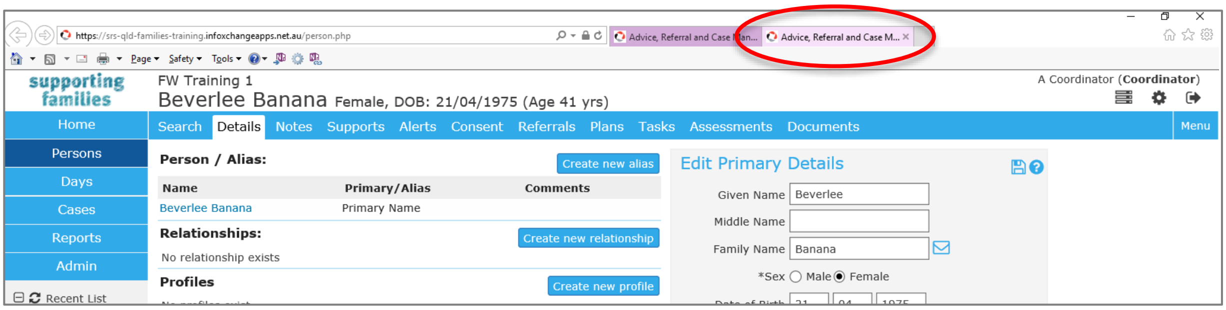
2. Click **GO** and a list of possible primary person records will be displayed.



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

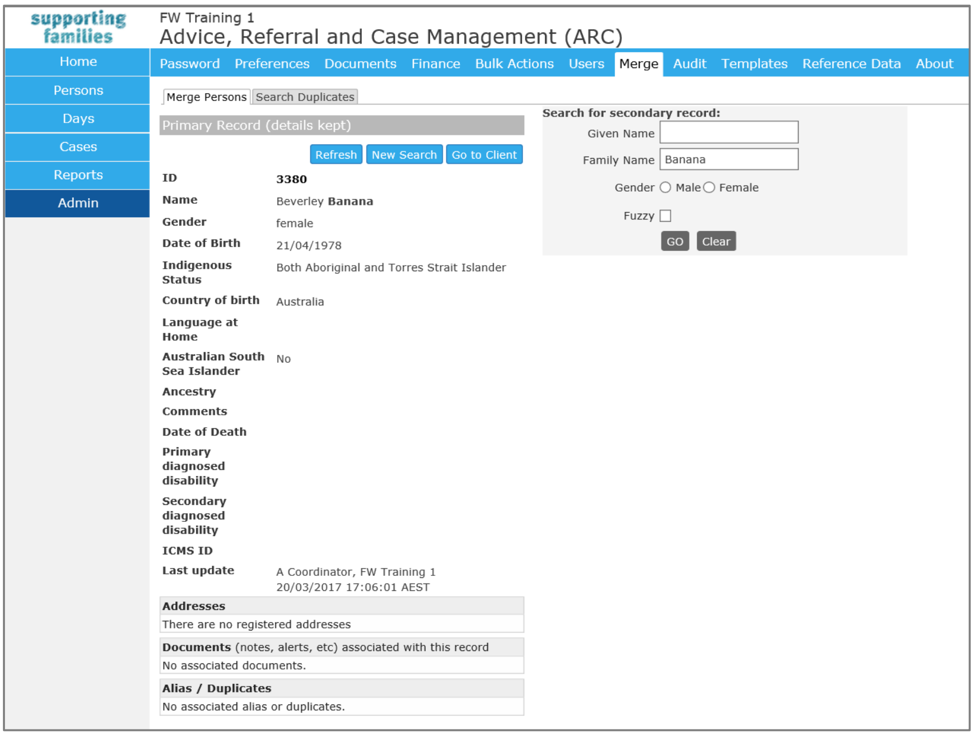
   Note: You can obtain the **Person ID** by holding the mouse over the client's name in the Person **Details** tab (see image below). The first number is the Person ID, the second number (if different) is the alias record ID. In the example below, the **Person ID** is '2275' and the **Alias ID** is '2275'.

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



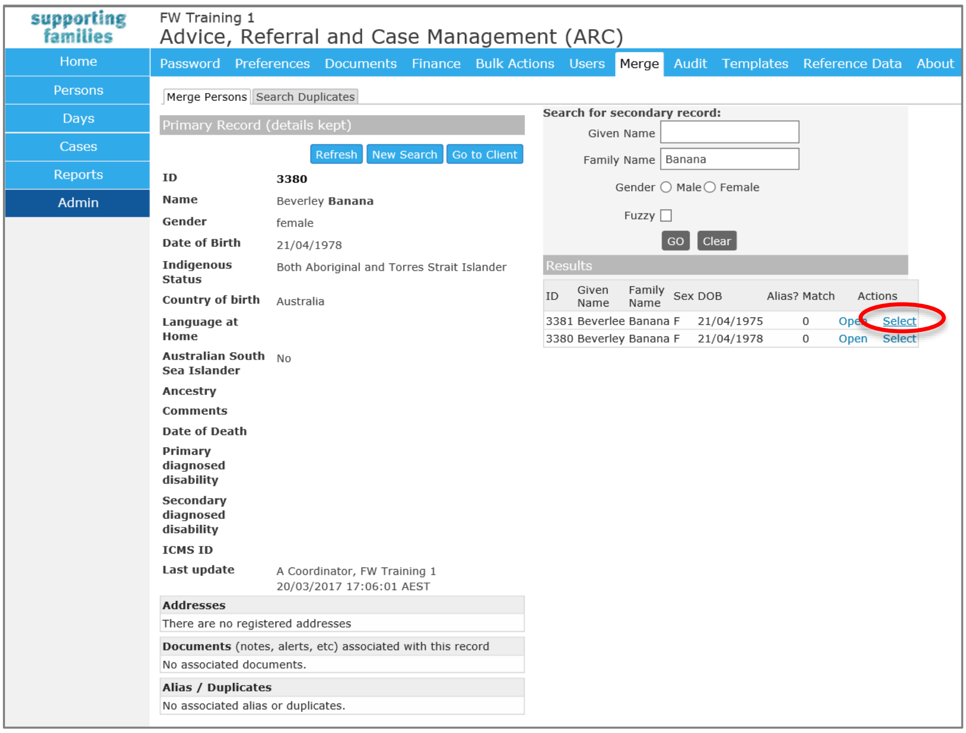
When you have finished reviewing the record, close the tab and return to the **Merge** tab.

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



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

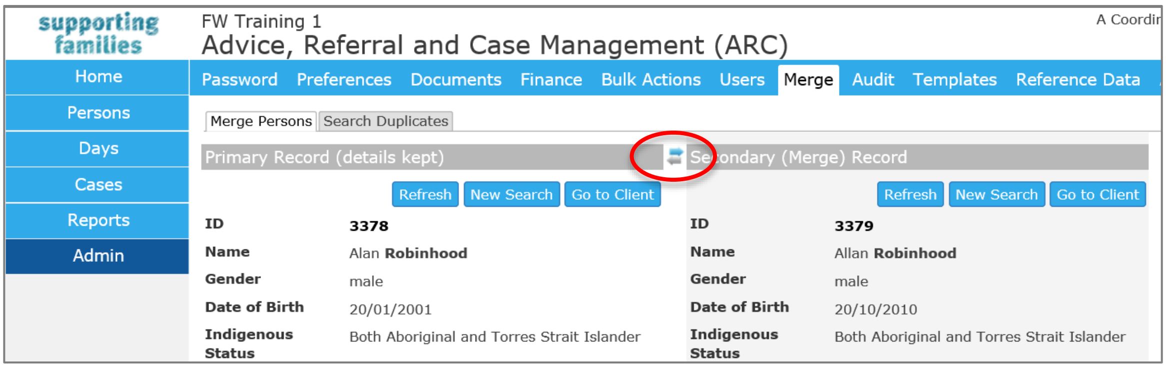
5. In the ***Search for secondary record*** form, enter the **Given Name** and/or **Family Name** of the secondary person record. These fields will have been defaulted from the search criteria entered in the primary search criteria. It is also recommended to click the **Fuzzy** search check box to display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



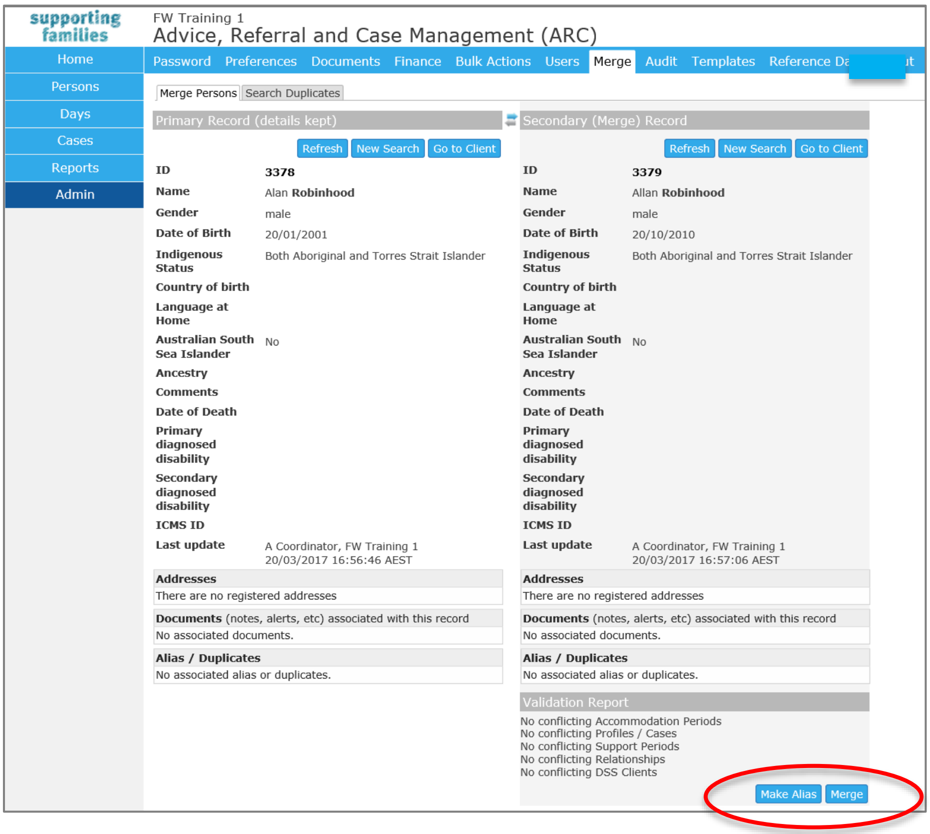
If you need to modify any details on the secondary person record, you can click the **Go to Client** button to open the client's Person Details tab in another browser tab. Once you have saved any changes in the Person Details tab, switch back to the current Merge process and click the **Refresh** button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

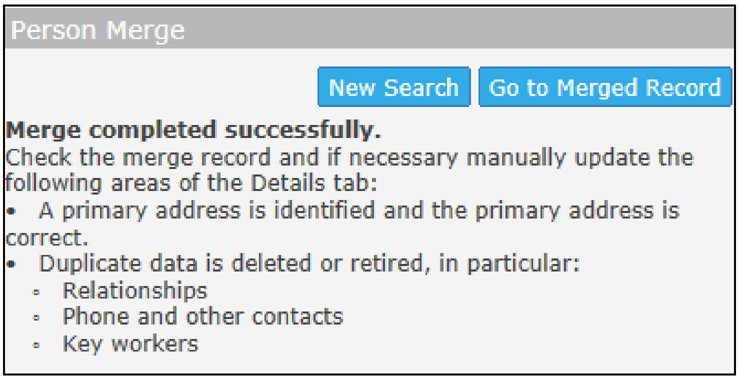


10. Click **Merge** to merge the secondary person record into the primary person record. (Please note that if the **Merge** button is not available, this will most likely be due to conflicting support period or profiles between the selected primary and secondary person records.)



11. An onscreen pop-up will ask "Are you sure you wish to merge these persons?" If you are sure you want to merge the records, click **OK** to confirm the merge.

12. Once the merge process has been completed, a confirmation message will be displayed indicating that the merge process was successful.

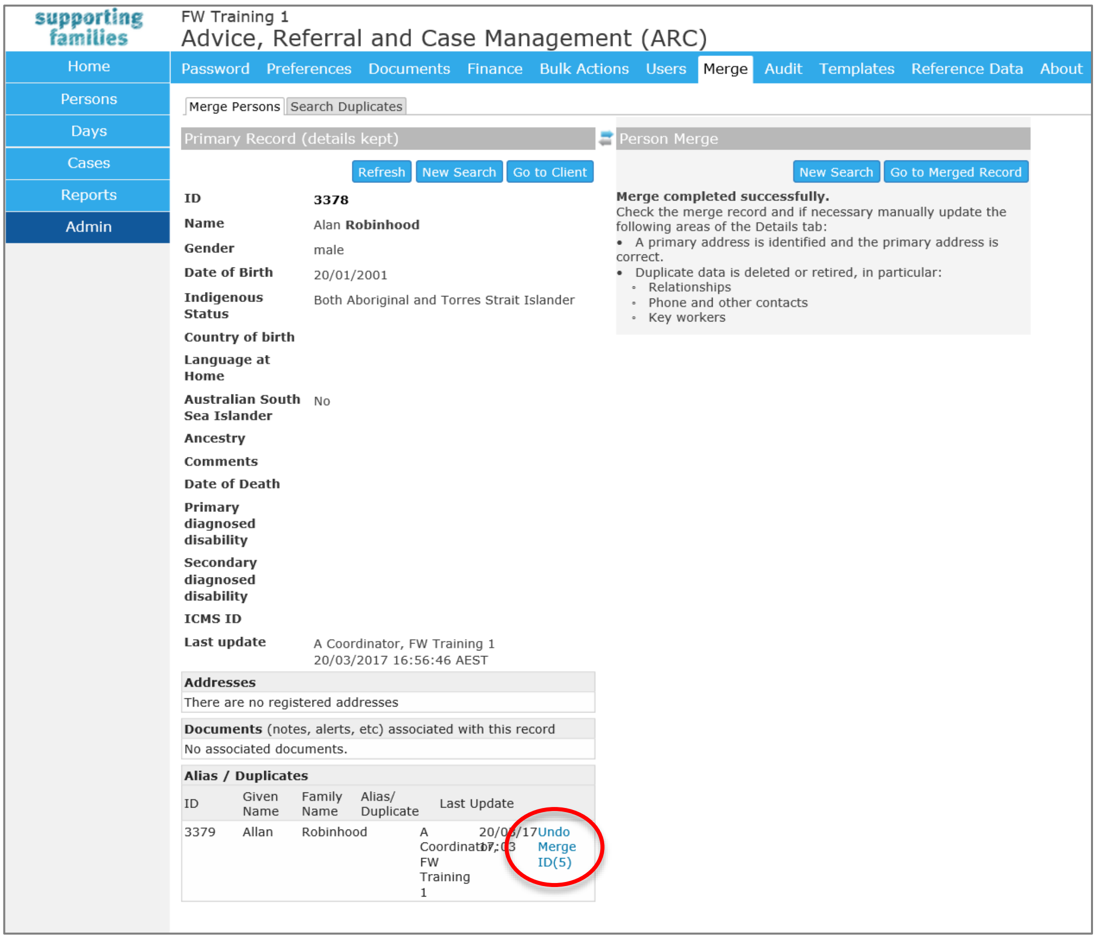


13. Be sure to go to the Merged record to ensure all the information is displaying as expected.

20.4.3 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.



20.4.4 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.

20.5 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

20.6 Templates

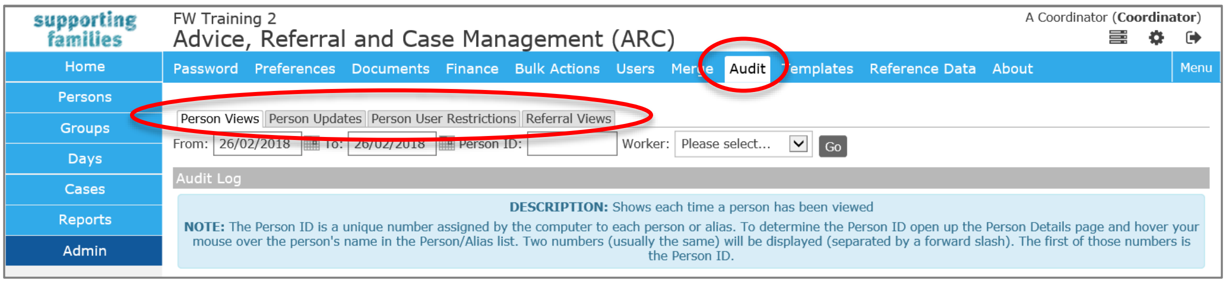
This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon to access SRS Help or review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides

20.7 Finance

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

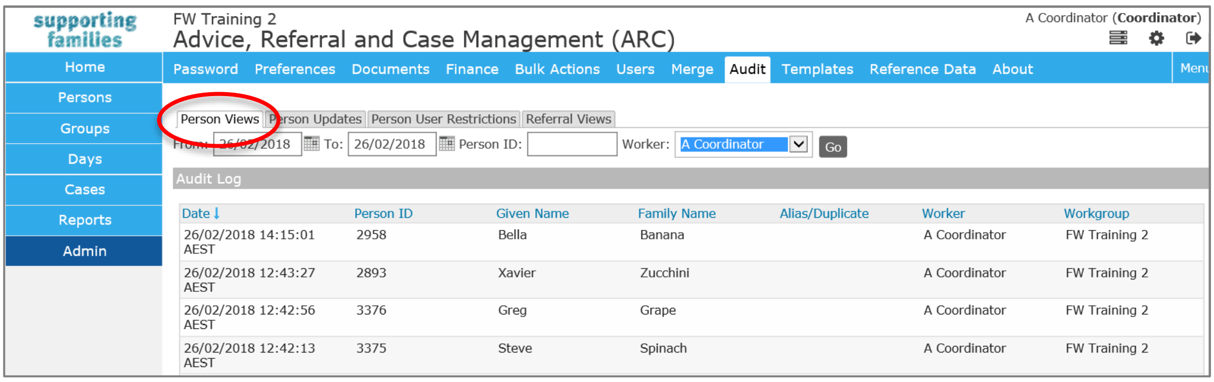
20.8 Audit

This is standard functionality from the Infoxchange SRS product.

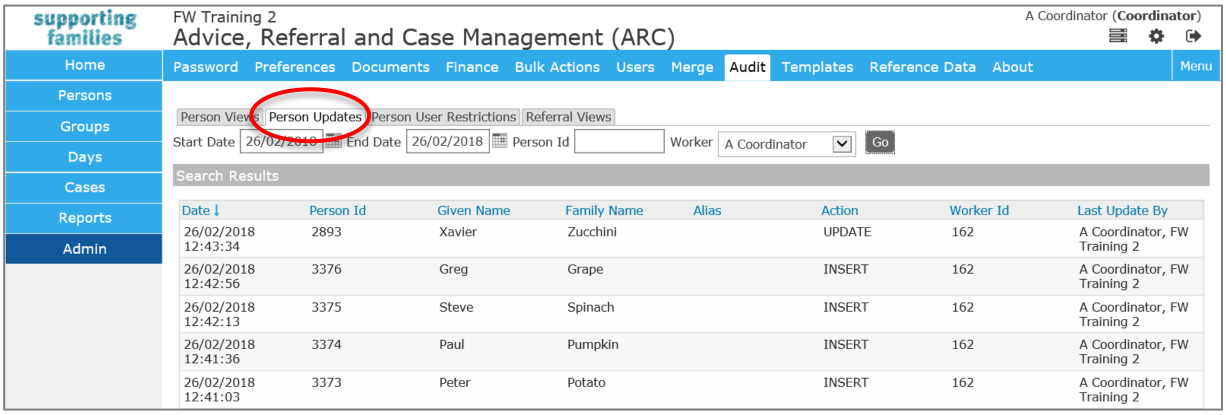


The **Audit** tab on the **Admin** page enables you to :

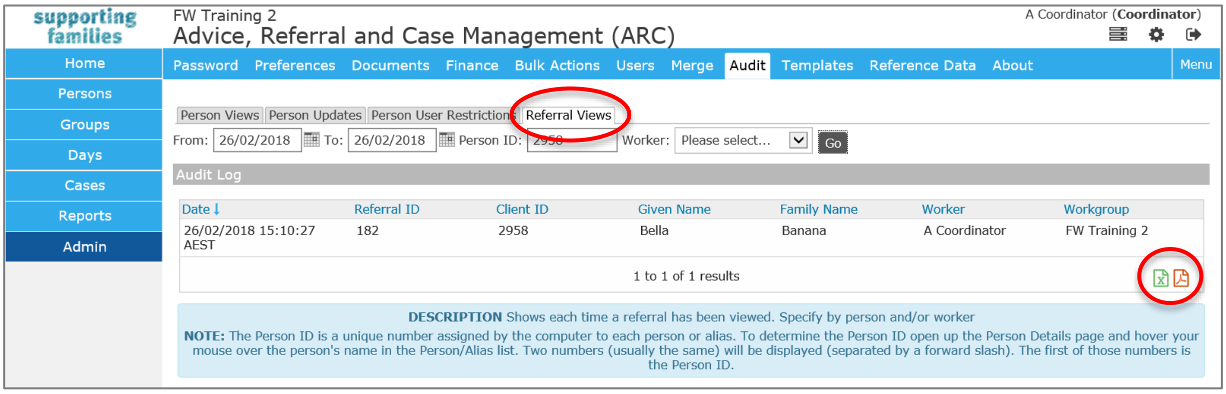
1. See users who have accessed a specific **Person** record.
   On the **Person Views** sub-tab, enter the **Person ID** with the relevant date range or select a specific worker and click **Go**.
   You can select a specific worker or leave at *Please select* to see all users who have viewed that specific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



2. 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**.



3. See each time a referral has been viewed – by person and/or worker.



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.

20.9 Reference Data

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

20.10 About

The **About** tab contains specific information about your connection to ARC as part of the Infoxchange suite of products.
You may be asked to access this data to assist the Infoxchange HelpDesk address queries or issues you may be experiencing.

21 ARC Support

21.1 How do I….?

This **User Manual** has been prepared to assist you with getting to know the functionality available within ARC.

Refer to this helpful document 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.

21.2 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.

21.3 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.

21.4 Practice Support

This manual provides the user with information on how to access and use the Advice, Referrals and Case Management (ARC) system for Aboriginal and Torres Strait Islander Family Wellbeing services.

For matters of practice, please refer to the information available at:

- https://www.csyw.qld.gov.au/child-family/child-family-reform/meeting-needs-requirements-aboriginal-torres-strait-islander-children-families-communities
- https://www.csyw.qld.gov.au/campaign/supporting-families/resources

Or email your query to ATSIfamilies@csyw.qld.gov.au