Department of Child Safety, Seniors and Disability Services

Advice, Referrals and Case Management (ARC) system

Intensive Family Support (IFS)

User Manual

October 2024

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

For matters of practice, please refer to the information available at the FaCC and IFS secure site

DISCLAIMER

This User Manual reflects the functionality of the system as at August 2024. 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

1 About ARC

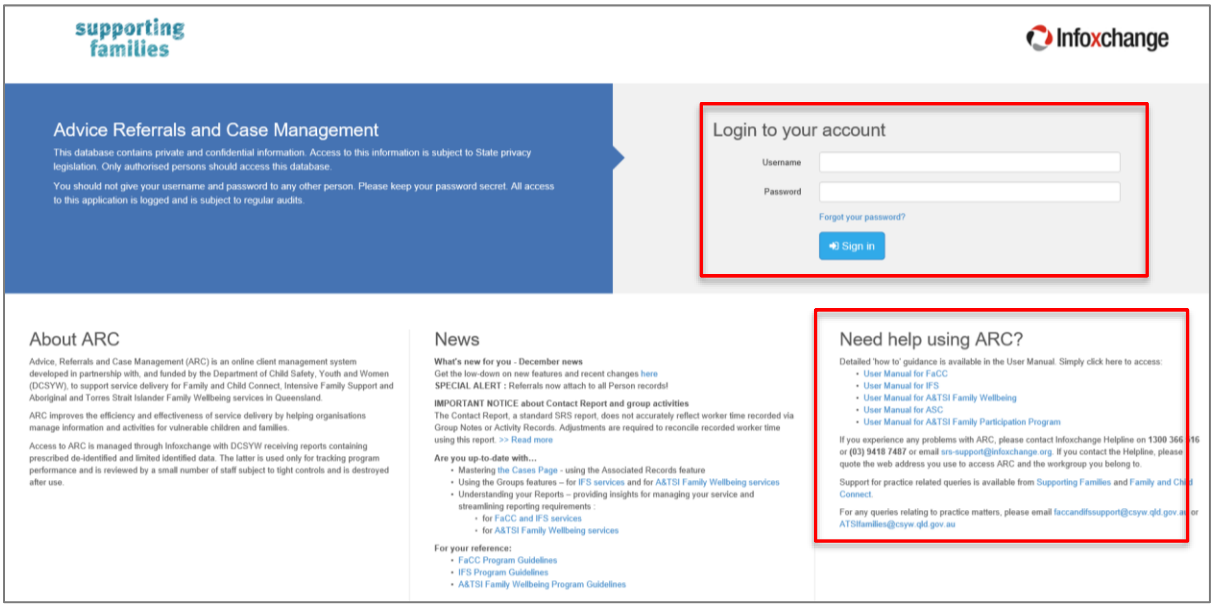
Advice, Referrals and Case Management (ARC) is the system developed for Intensive Family Support services to manage information and advice, referrals, assessments, case management and reporting. ARC integrates tools and performance reporting to streamline the capture of reliable data for evaluating the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

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

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

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



1.2 Logging in for the first time

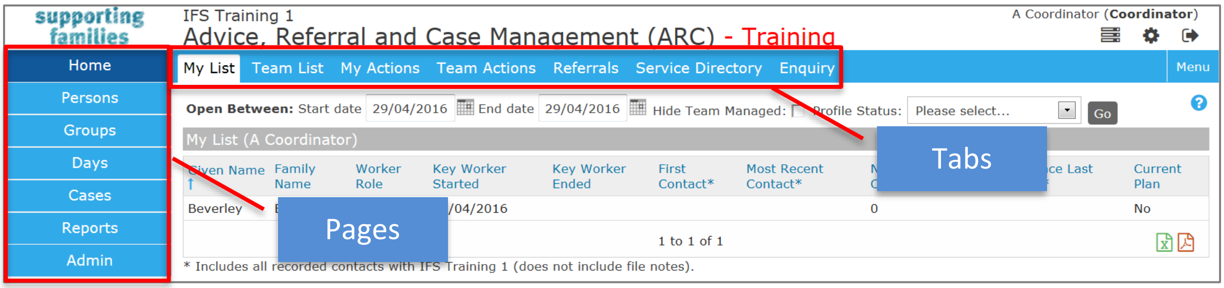
When you log in for the first time, you may be asked to change your password. We recommend that you change your password to something easy to remember.

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

Do not write down your password.

When logging in the first time, you will also be asked to update your security questions and email address, this will help identify you within the system and allow you to reset your password if required. **You will be prompted to update these preferences each time you login until you complete these items.** Refer to 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:

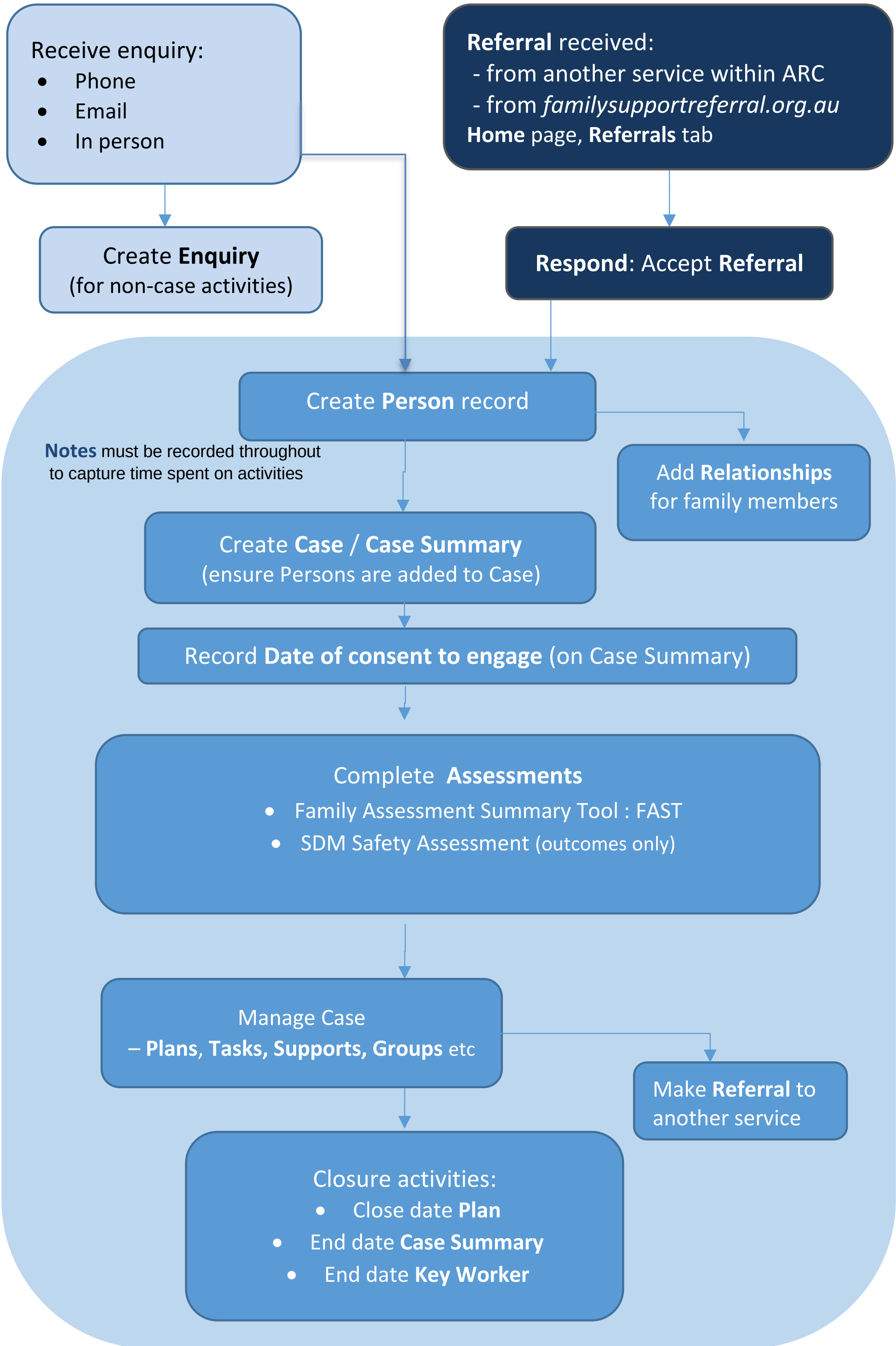
- Pages – 7 options on the left-hand side
- Tabs – appear across the top for each Page
- Workspace area – the central area.

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 Groups and associated functions
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.



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. A new record is simply created to record the current / new activity.

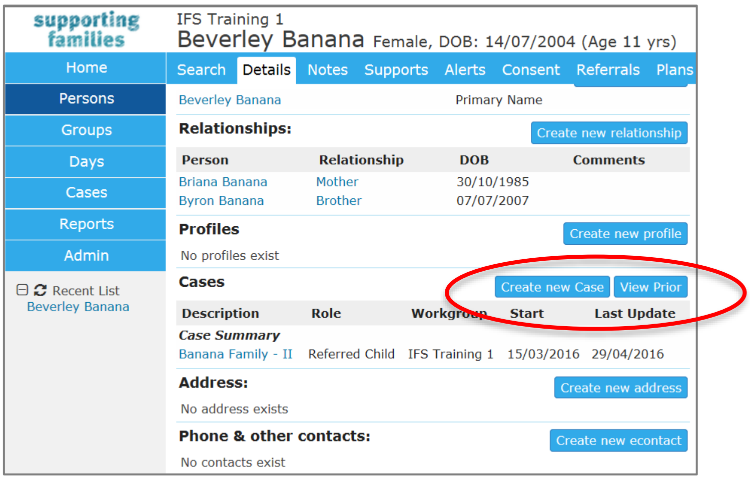
This **View Prior** feature occurs throughout ARC - the screenshots below provide an example of how it appears.

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

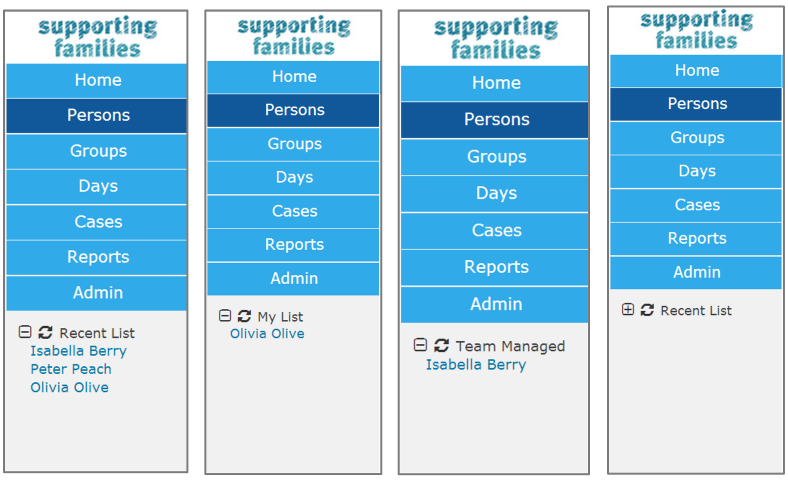
1.5 Toggle for access to Person records

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.

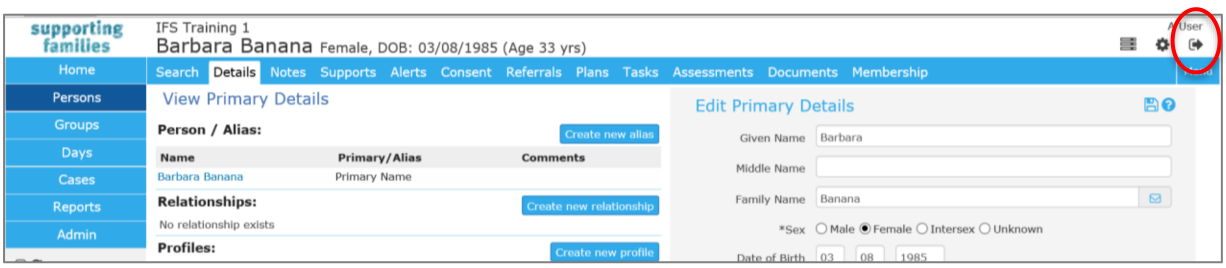
Simply …

- 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

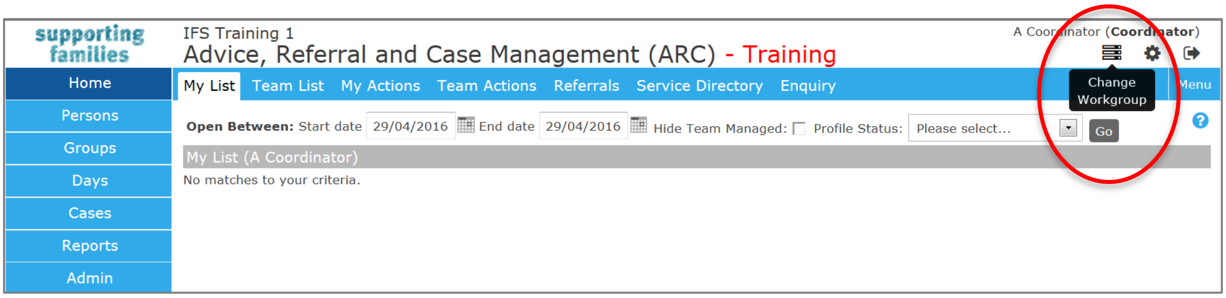
Log off via the log out icon on the top at the far right of the screen. Simply click to log out. Users should log out as soon as they have completed their work within ARC.



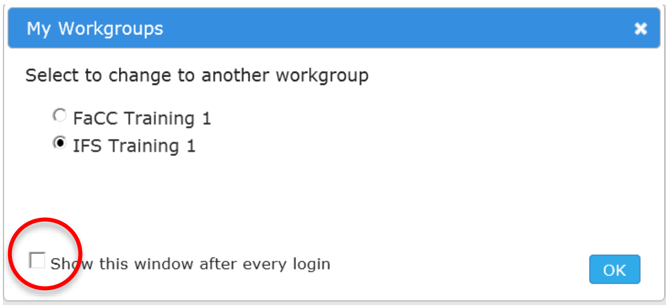
1.7 Access to more than one workgroup

In ARC, each service is set-up as a separate workgroup. For some organisations, staff may work across a number of services i.e. access is required for more than one workgroup. Where this is required, each worker only needs one log in to ARC with 'multiple workgroup access' enabled by the Infoxchange Support Desk. This provides the most efficient access for the worker and the most economic use of available licenses.

With 'multiple workgroup access' enabled, simply click the **Change Workgroup** icon, as shown below, in the top right of your screen to select the workgroup you require.



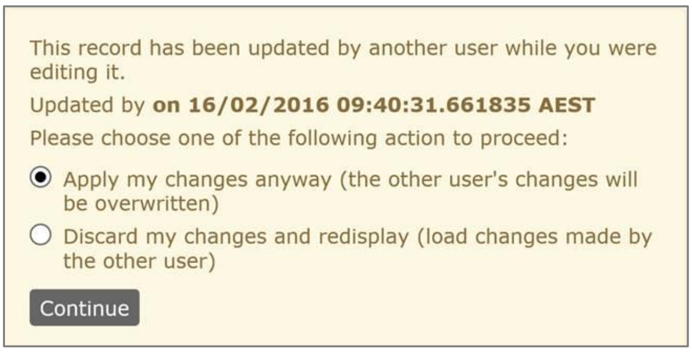
The workgroup options you have available will display. Simply select the radio button for the required workgroup and click OK.



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:



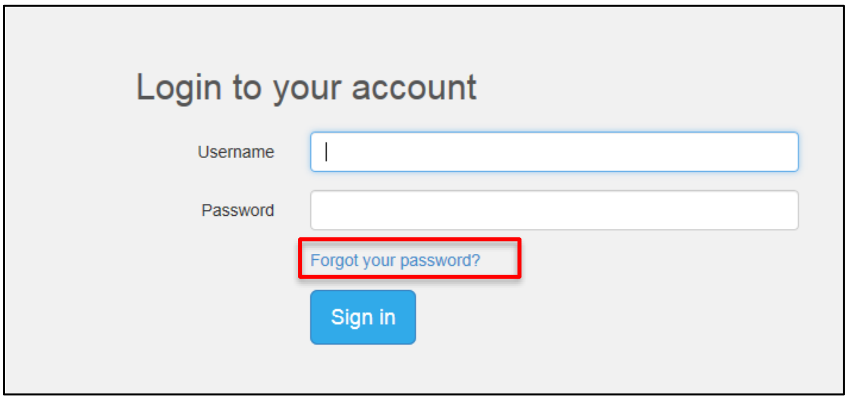
Select the required option and **Continue**.

1.9 Forgotten password

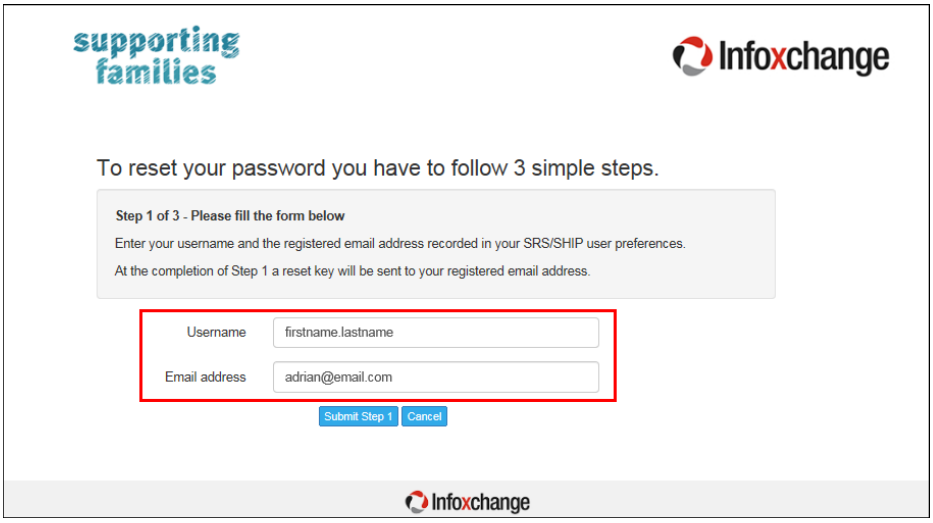
After you have logged in for the first time and have completed your Preferences (on the Admin page), the 'Forgot your password?' link on the landing page can be of great help.

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.

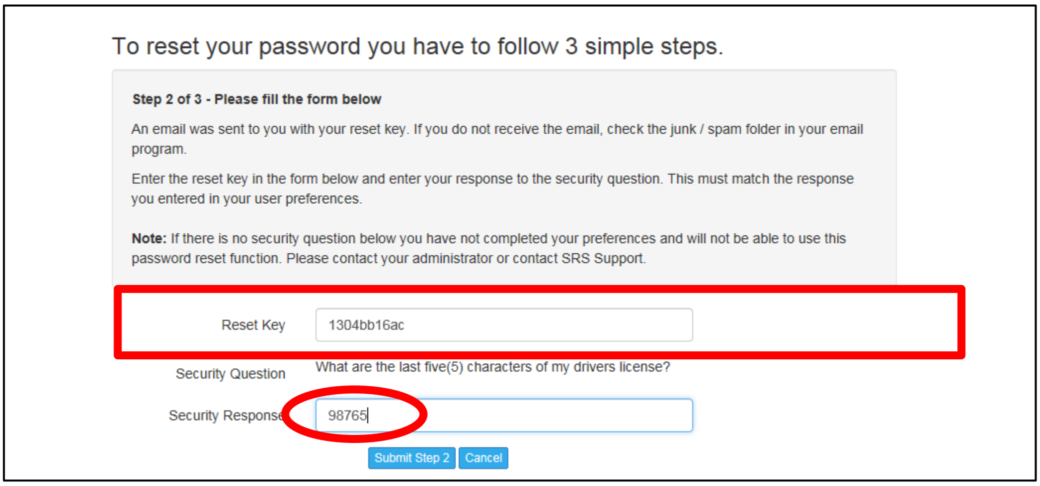


2. Enter your username and the email address registered with your user profile and select **Submit Step 1**



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

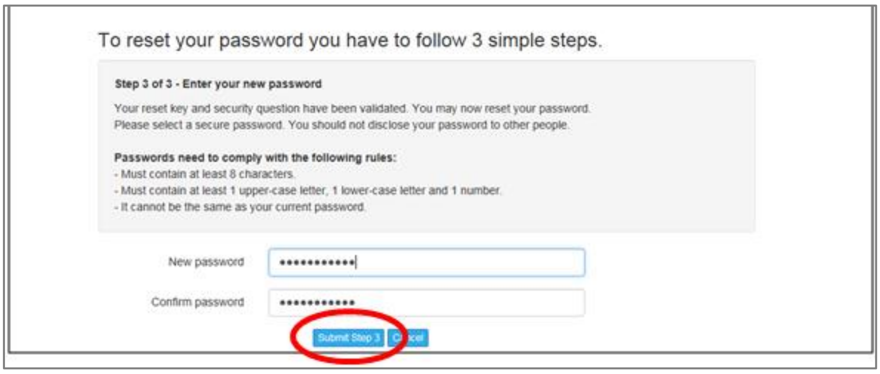


4. Enter your **new** username and password

<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.

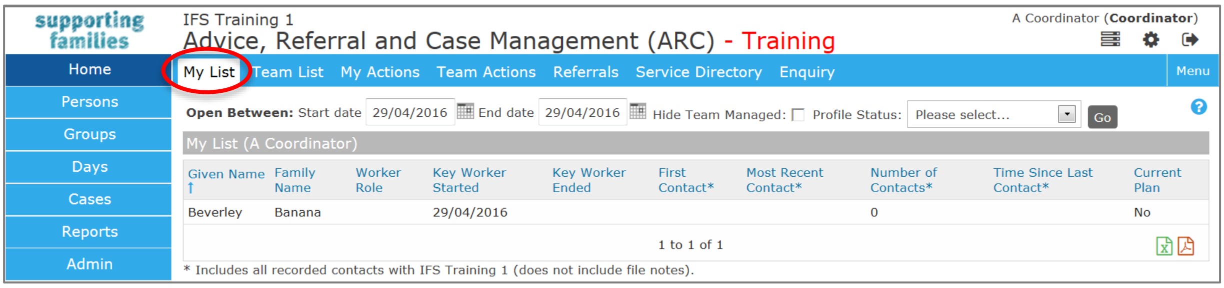
2 Home Page

2.1 My List

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

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:



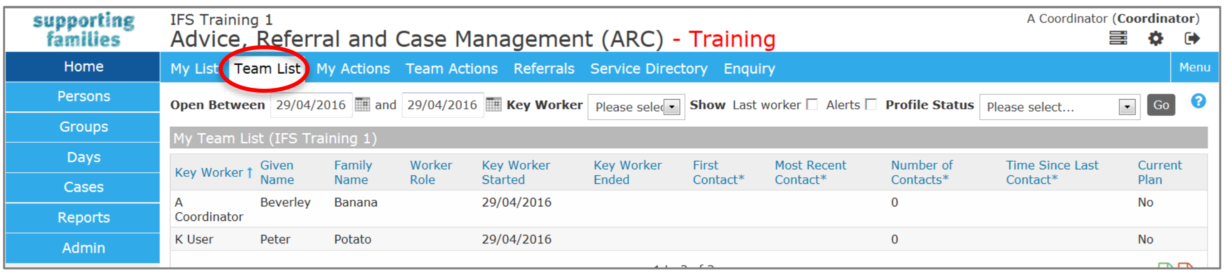
The following options can be used to customise your view:

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

2.2 Team List

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

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



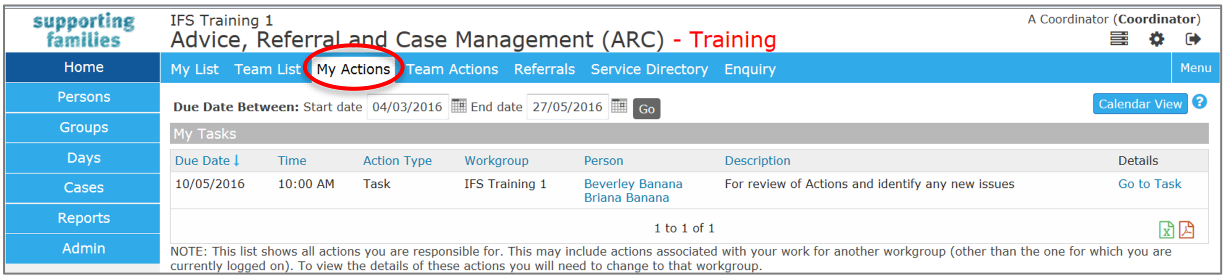
The following options can be used to customise your view:

- 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.

2.3 My Actions

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

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

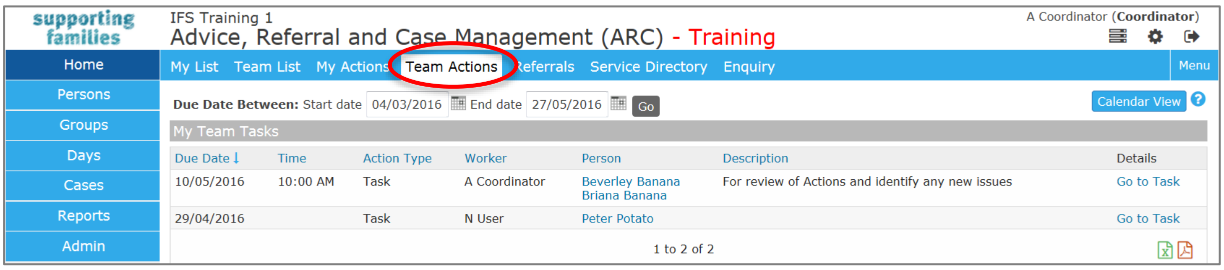


The following options can be used to customise your view:

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

2.4 Team Actions

The **Team Actions** tab is used to view the list of actions within your Workgroup.
From the **Home** page, select the **Team Actions** tab.



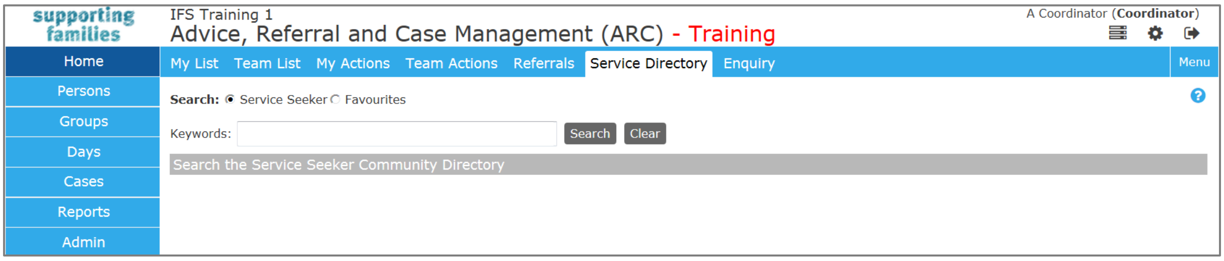
The same features for navigating and customising **My Actions** can be applied to this tab.

2.5 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.

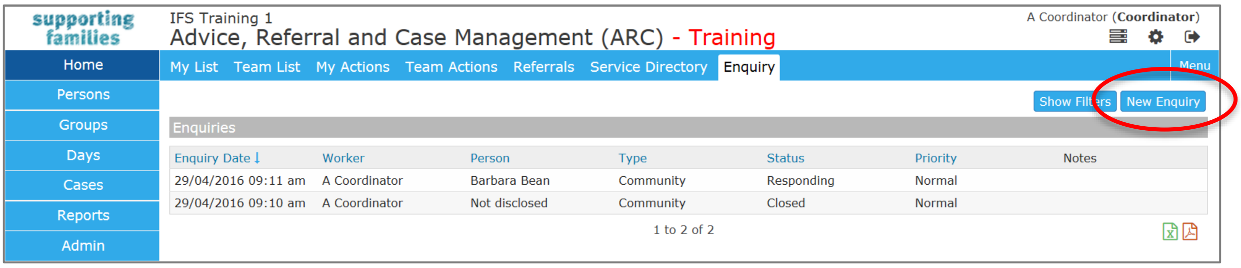
3 Enquiries

The **Enquiry** form is used to capture data including time spent relating to queries/enquiries received e.g. telephone calls, emails or in-person interactions associated with the potential for providing support to vulnerable children and families. For IFS services, this will typically represent ad hoc casual enquiries / non-case activities.

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

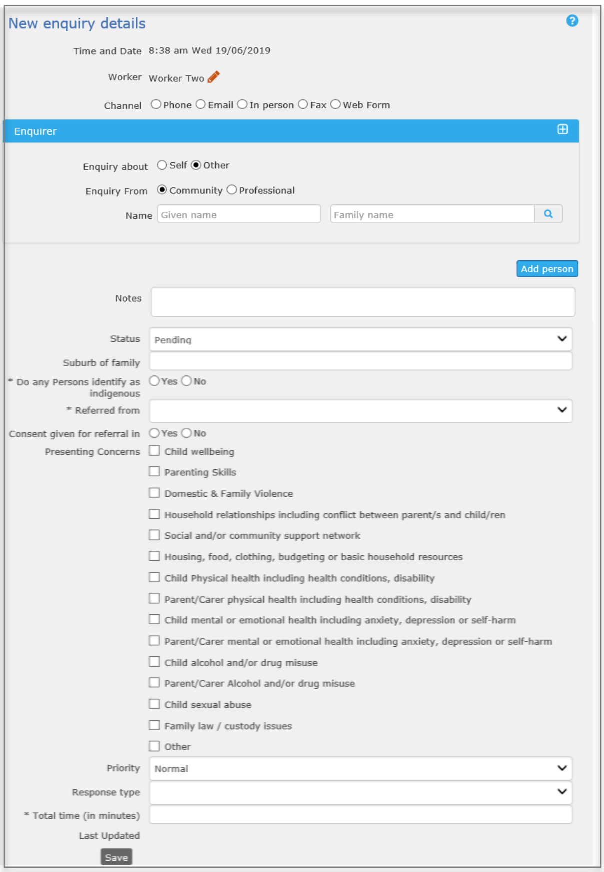
3.1 Create an Enquiry

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.



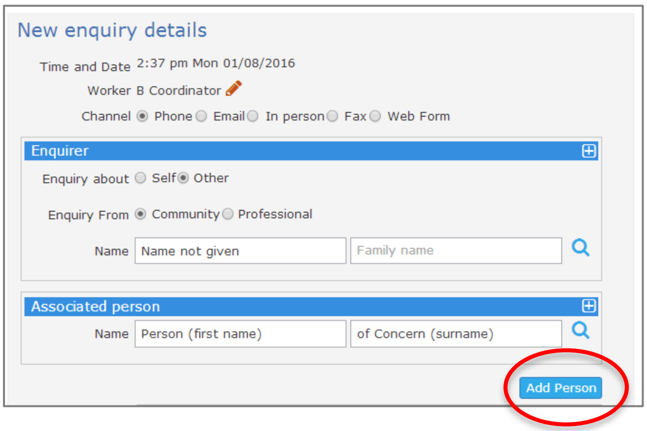
It is important to complete all fields accurately as many of these fields are included for reporting purposes.

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

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

   <u>Note</u>: It is not mandatory to record a name.

5. To record the name of the Person/s 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: Functionality is <u>not</u> currently available from Infoxchange to enable Enquiry records for a Person to be identified from their Person record.



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

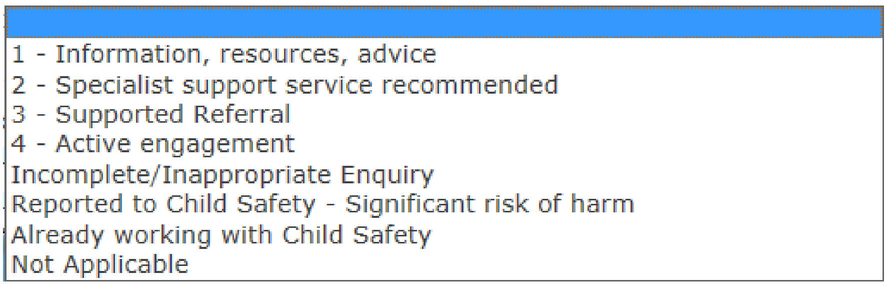
10. Select enquiry **Status:*** from 3 available options :
    - *Pending* (new Enquiry)
    - *Responding* (in progress, being actioned by someone in your service)
    - *Closed* (finalised/complete)

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



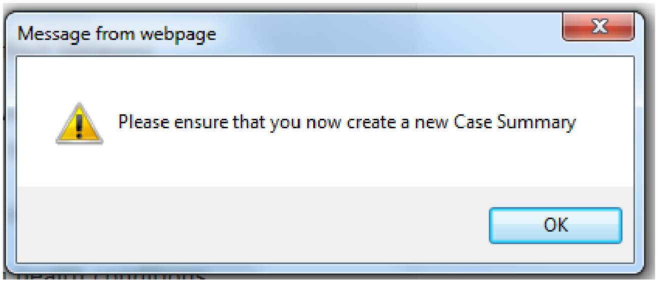
Response type is mandatory * when the **Status** is set to *Closed*.

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:



Additional Notes:

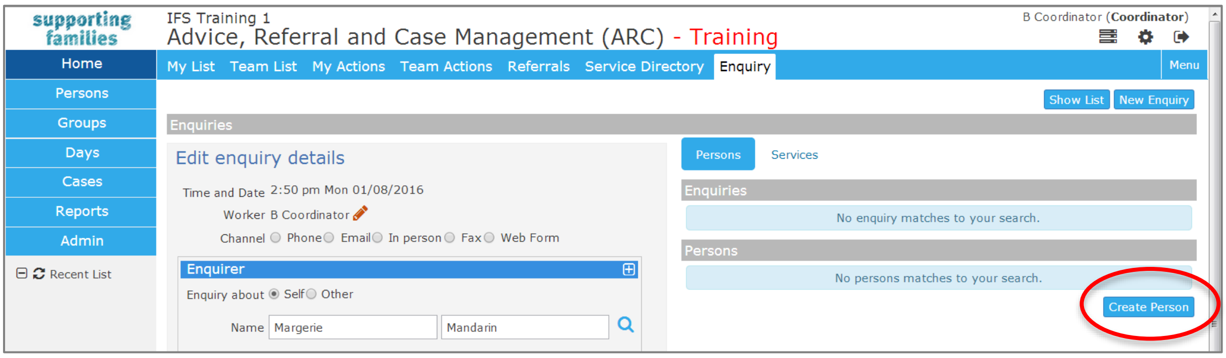
- To cancel an Enquiry before it is saved, simply click on the **Enquiry** tab at the top of the page.

3.2 Create Person record from an Enquiry

1. To create a new Person record from an **Enquiry**, enter the person's name in either the **Enquirer** section (for self-referral) or in the **Associated Person** section and select the icon.

2. If there is no record displayed, select **Create Person** on the right hand side of the screen. This will open the **Add New Person** screen as a new tab. Refer section Add a Person for more information on creating a Person record.

   PLEASE NOTE: This is limited functionality as Enquiry records are not able to be accessed from the Person record.

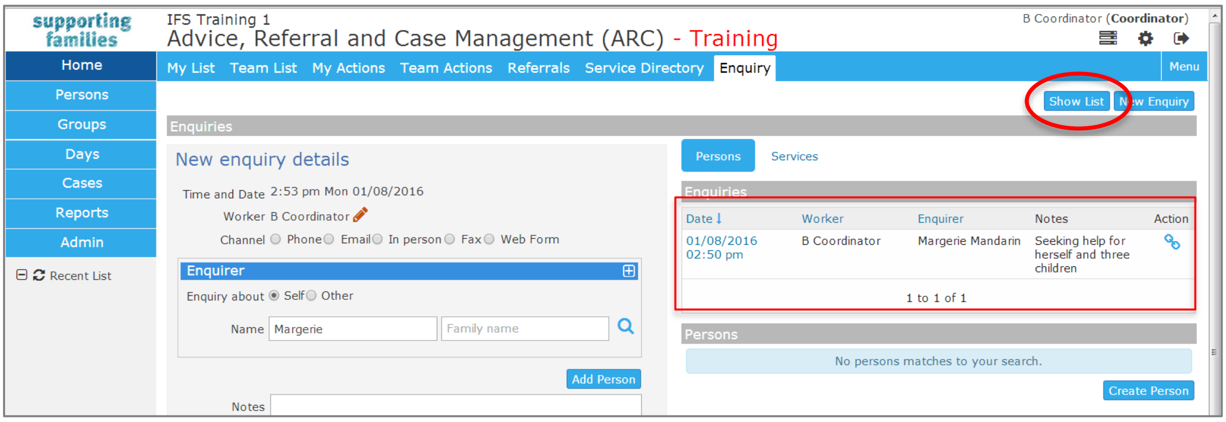


3.3 Locate an existing Enquiry

1. To ascertain if there is an existing **Enquiry** in progress, you can review the **Show List** view or, if you open a new Enquiry form, enter the person's name in the **Enquirer** or in the **Associated Person** section and select the icon.

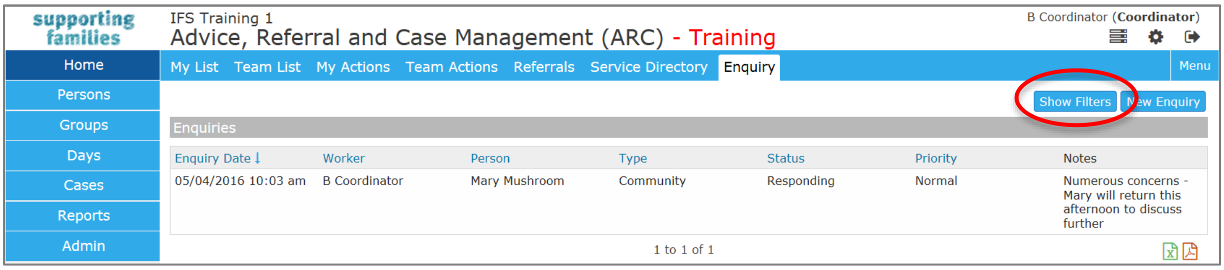
2. If the Person has an existing Enquiry record, it will be shown on the right hand side of the screen. You may choose to add additional notes to this existing Enquiry, or continue with the new Enquiry, as appropriate.

3. Any additional time must be added to that already noted against the Enquiry, so that it reflects the cumulative amount.

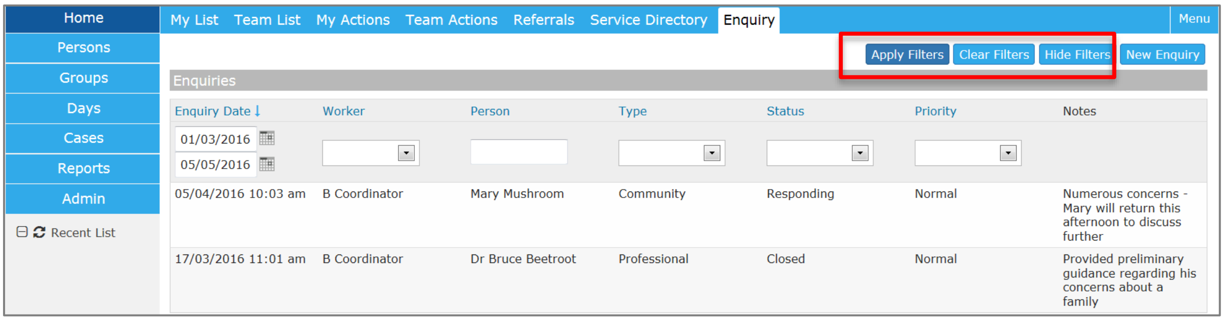


3.4 Using the Enquiry List

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

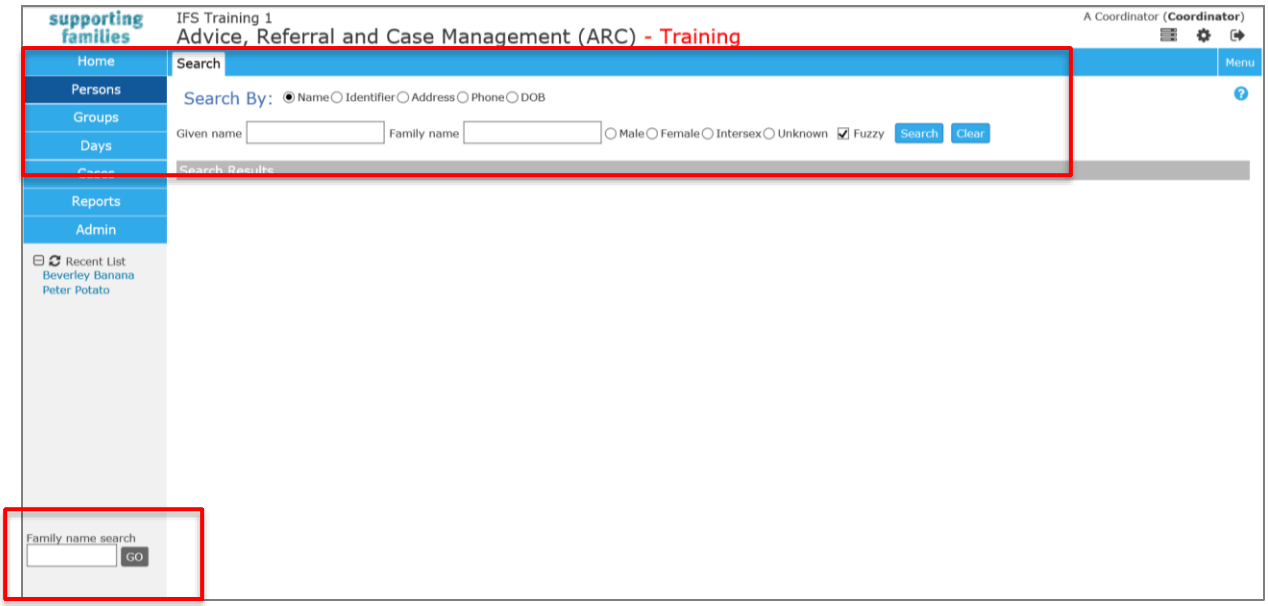
4 Person Details

4.1 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. A wildcard is a character (either * or %) that can be used as a substitute for characters in a search, which greatly increases efficiency and flexibility. For example, %ke returns a list of all persons where the last two letters in his or her name is 'ke'.

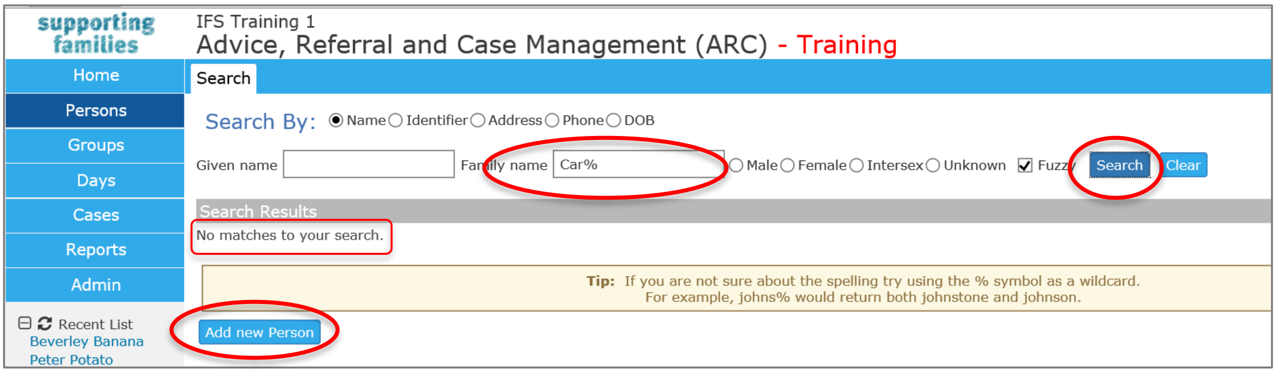
ARC recognises the * and % characters as wild cards. The * and % are both available to be used for wildcard searching and their use is identical and down to personal preference.

Some example wildcard searches include:

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

4.2 Add a Person

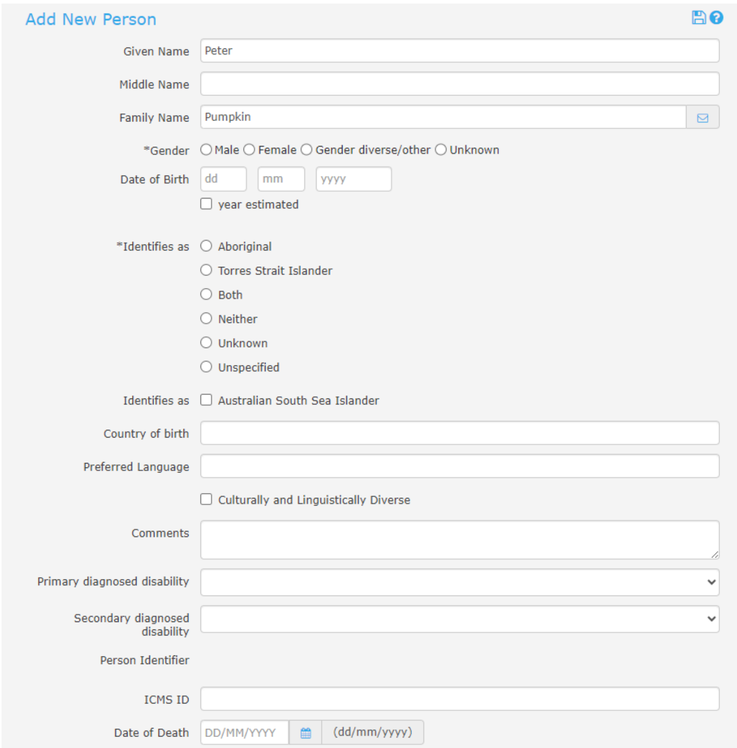
1. On the **Persons** page**, Search** tab**,** enter the criteria for the person you are searching for.
   It is highly recommended to adopt use of the wildcard.
   Click **Search**.



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.
   Gender and First Nation status are mandatory fields (*).
   If the exact date of birth is unknown, select a year only and tick the **year estimated** checkbox.



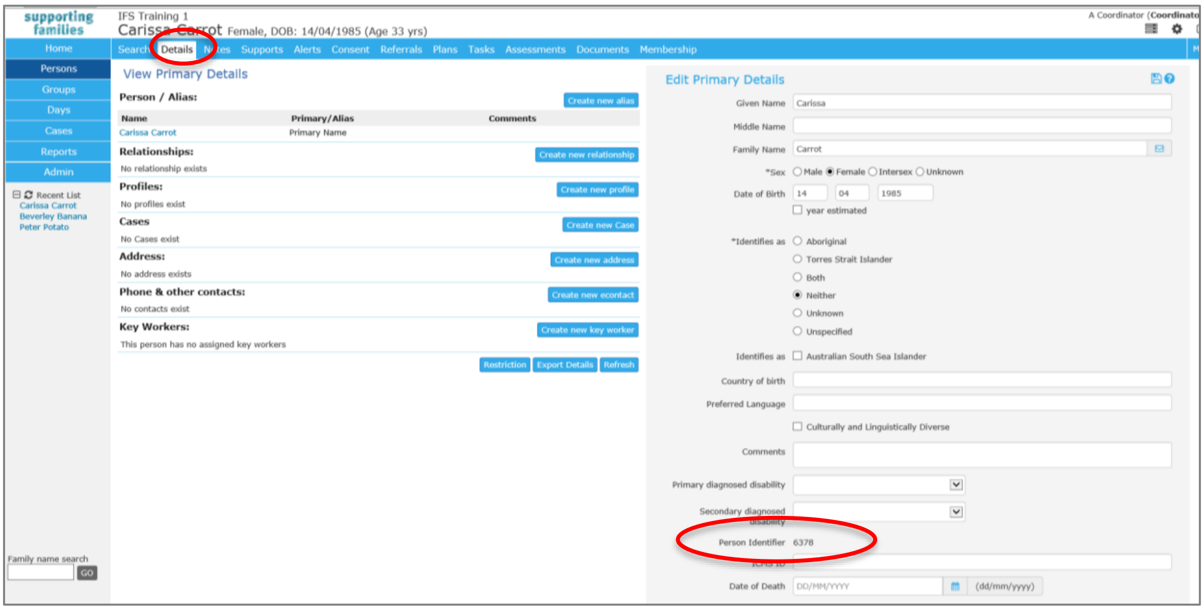
For recording *First Nations status*,

Unknown – the person does not know their First Nation's status

Unspecified – the person does not wish to specify their First Nation's status.

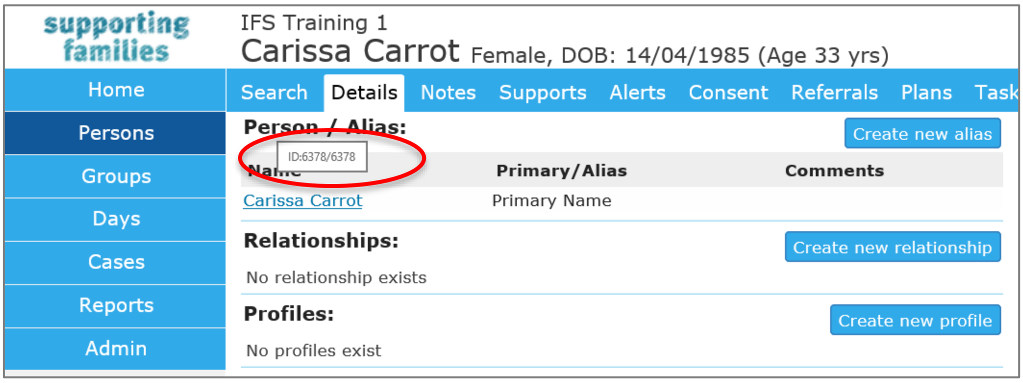
4. Select the **Save** button or select the icon in the top right of the form.

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



Person Identifier / Person ID:

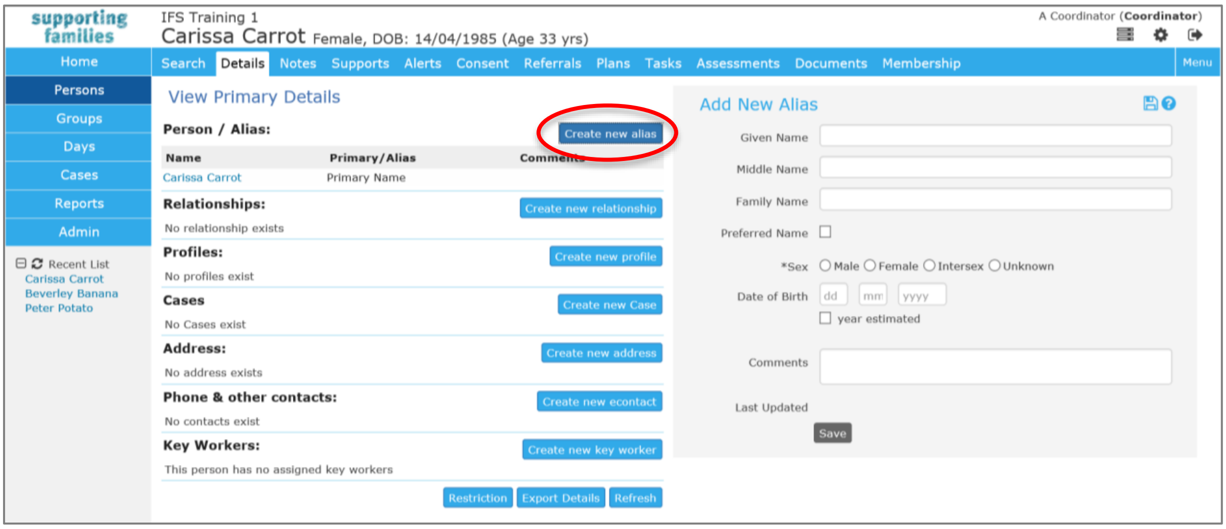
The system-generated **Person Identifier** number can be found by hovering over the Person name on the **Details** tab, as shown below, or from the Edit Primary Details form, as shown above.



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

4.3 Create Alias

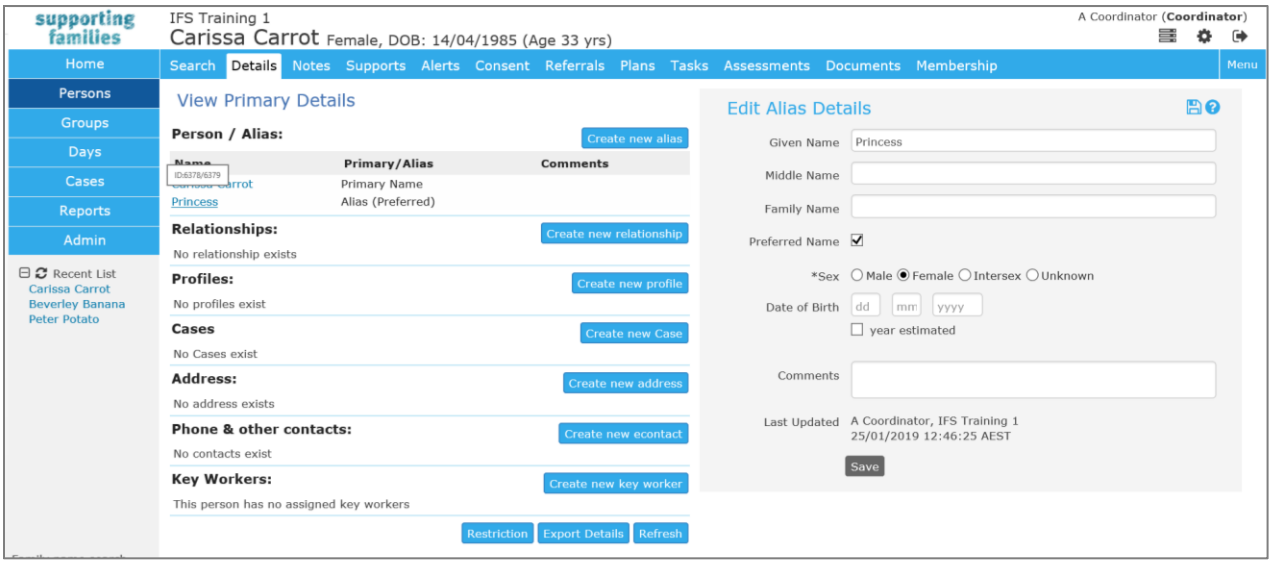
1. From the **Person** page, **Details** tab, select **Create new alias**.



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

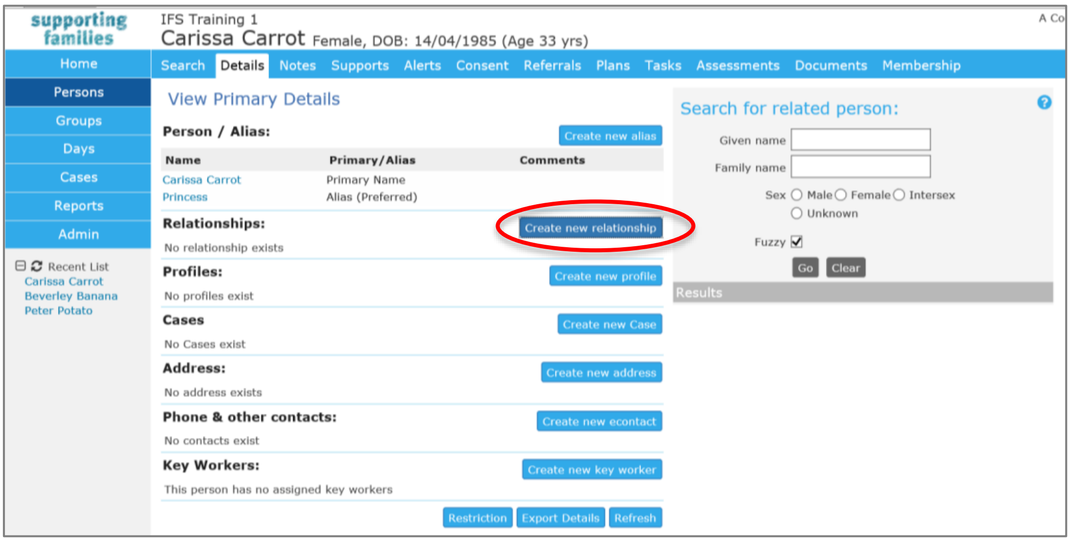
3. To modify the Alias, click on the Alias name and the **Edit Alias Details** form will display on the right hand side.

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

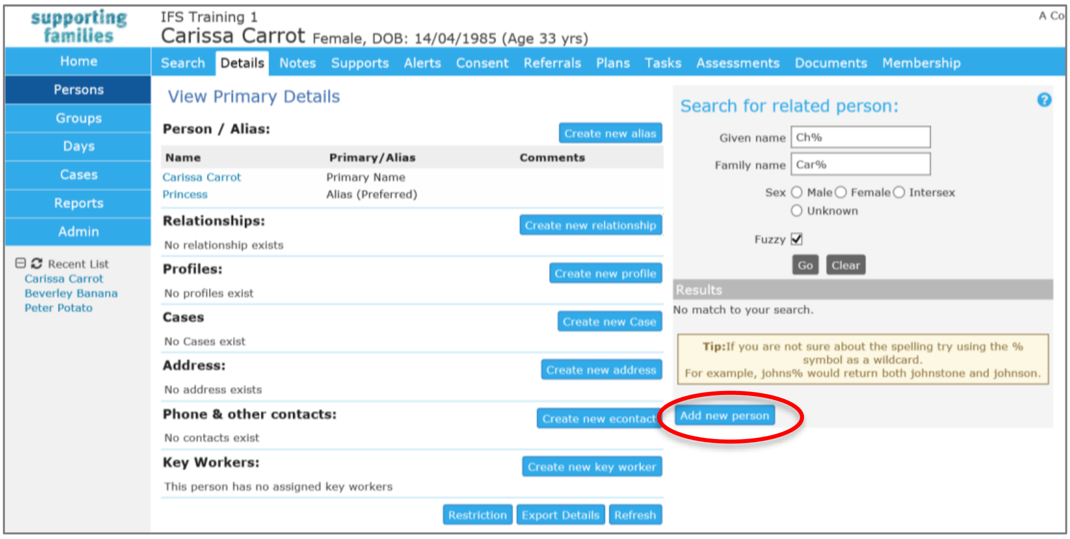


4.4 Create Relationships

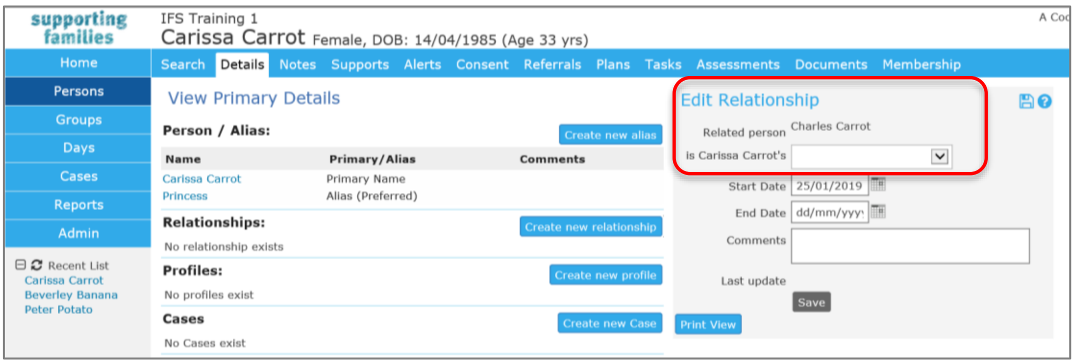
1. From the **Person** page, **Details** tab, select **Create new relationship**.



2. Search for the related person – using wildcard. Click **Go**.
   If no records are found, select **Add new person.**

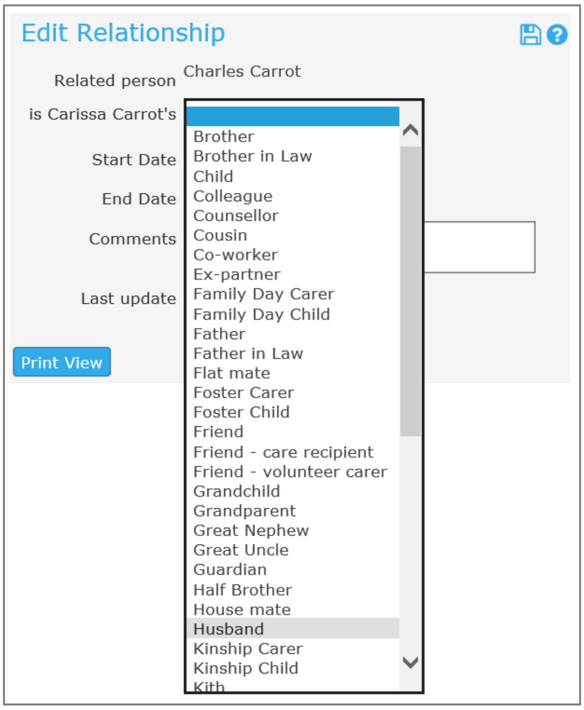


3. Complete record as outlined in the preceding section Add a Person . Click **Save**.
4. The **Edit Relationship** form will display.

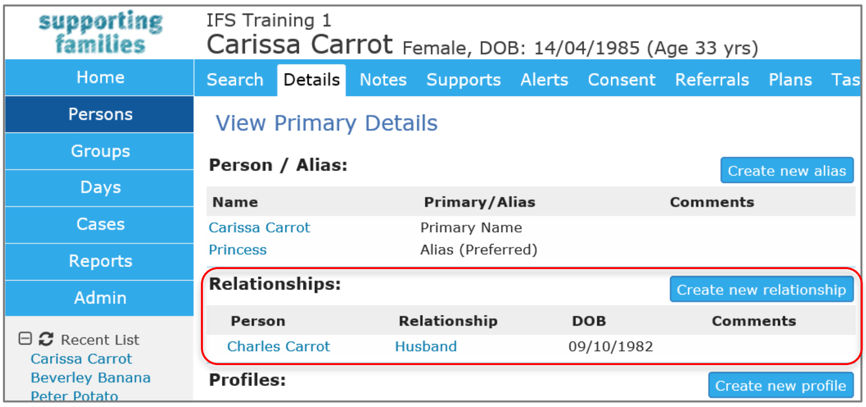


5. From the drop-down list, select the required relationship type. In this example, Charles Carrot is Carissa Carrot's *Husband*.
Select **Save**.

Note: the start date for a relationship auto-populates with today's date (when the record is created). If you choose, you may record the date relevant to the relationship, with supporting notes recorded in the Comments box.

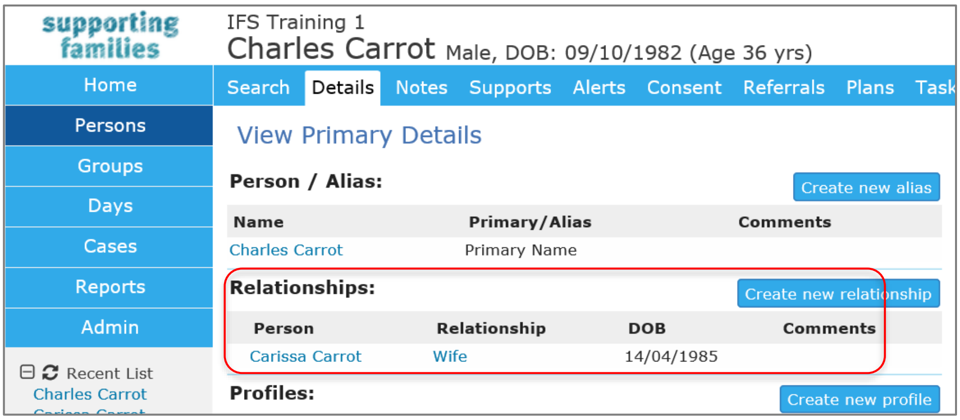


6. The relationship is now shown on the Person's **Details** tab.



You can access Charles Carrot's **Person** record by clicking on his name.

Carissa is displayed in the **Relationships** on his record.



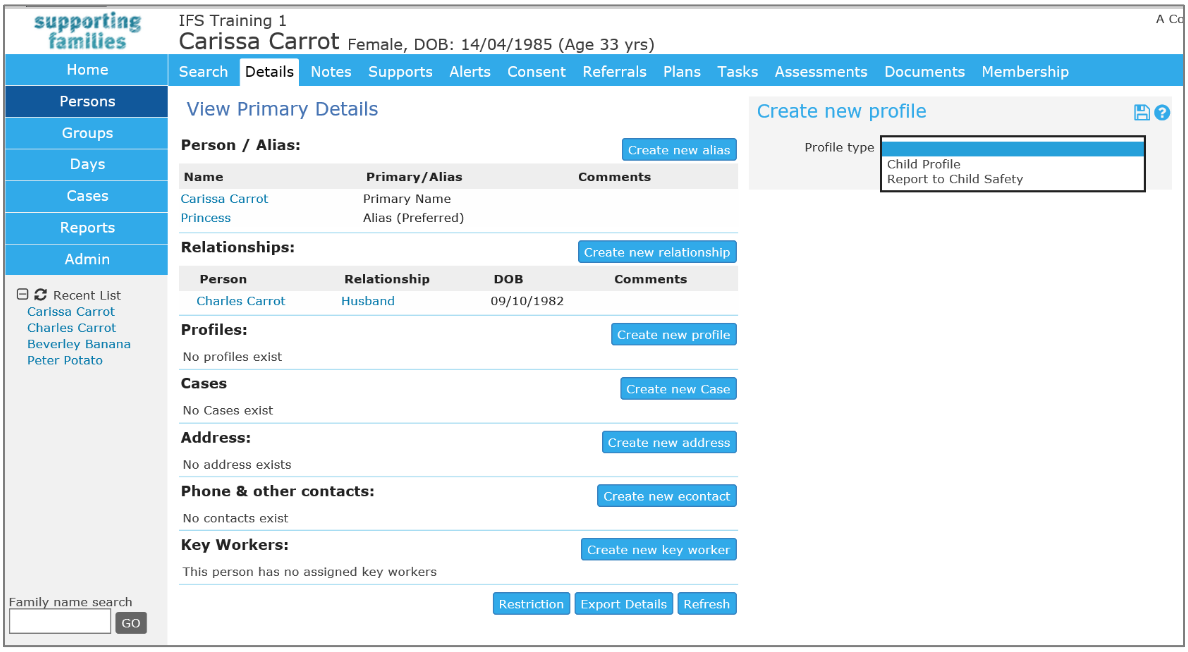
If you click the relationship value, the **Edit Relationship** screen opens if you need to edit / update.

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

4.5 Create Profile

Two profile templates are available: *Child Profile* and *Report to Child Safety.*

The use of these Profiles is entirely at the discretion of your service – please refer to procedures required by your service.



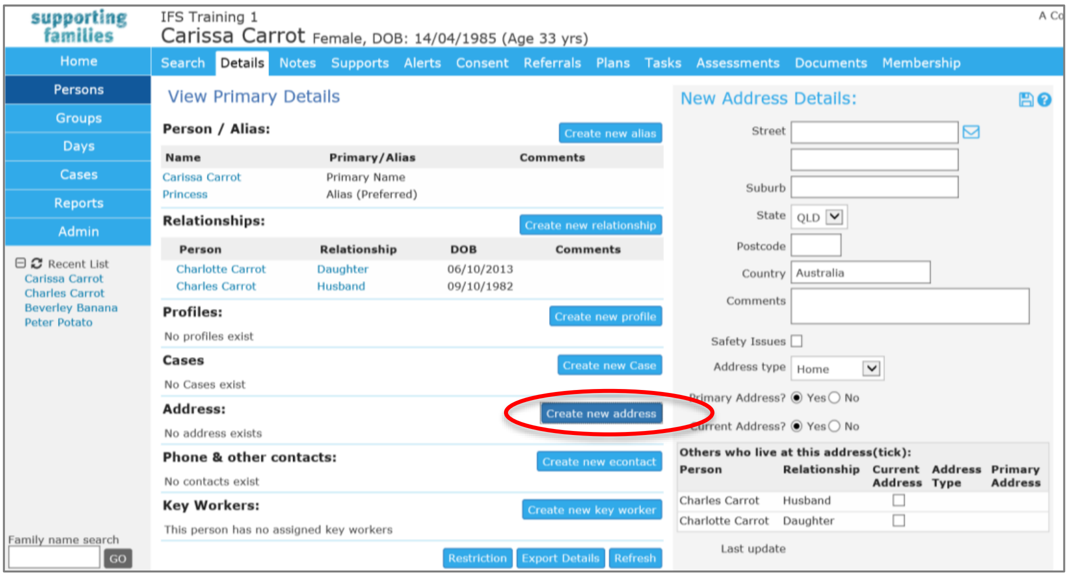
These records are <u>not</u> included in any departmental reporting.

4.6 Record Address

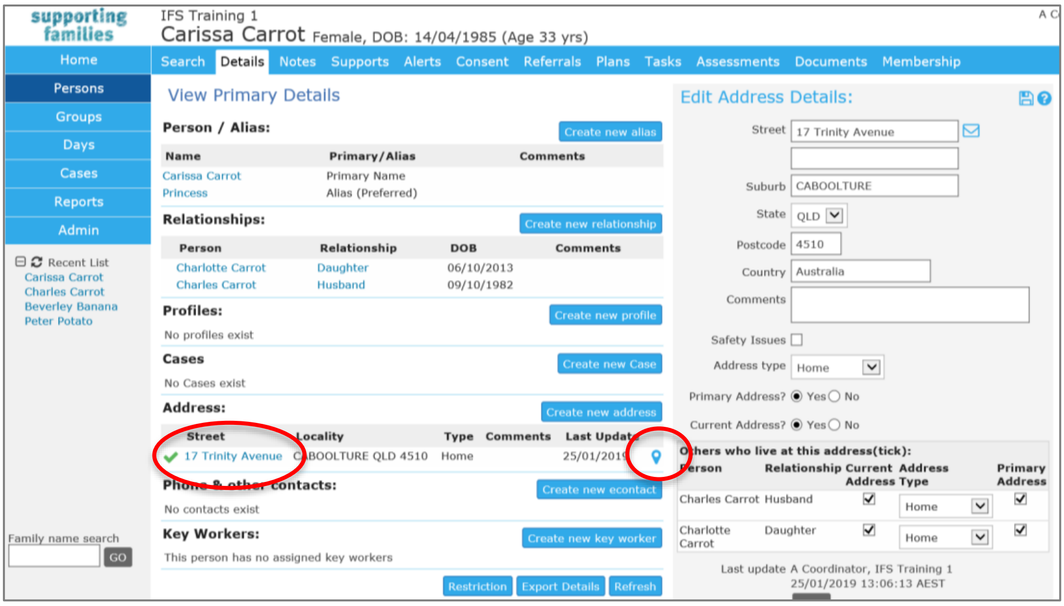
Multiple current addresses (such as home, postal or respite) can be recorded for a Person. However, at any one time, a Person can only have one Primary address.

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.

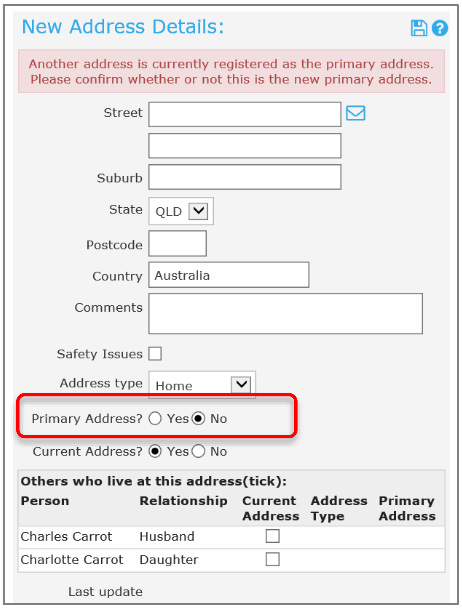


2. Record the address, including **Street**, **Suburb** and **Postcode**.
3. Select the **Address type**.
4. Update the **Primary** and **Current** address status (Yes/No) as relevant for that Address type.
5. The address can be recorded, where relevant, to related persons by ticking the checkbox, in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



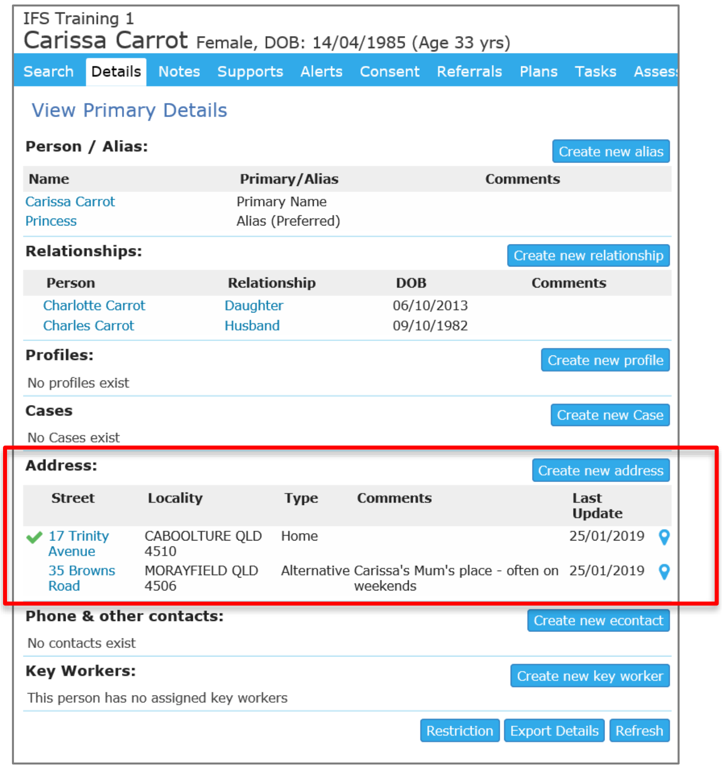
Additional Notes:

- When you start typing the Suburb, a list of possible options will appear.
- When you select the Suburb, the **Postcode** will be populated automatically. 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. Click **Save**.

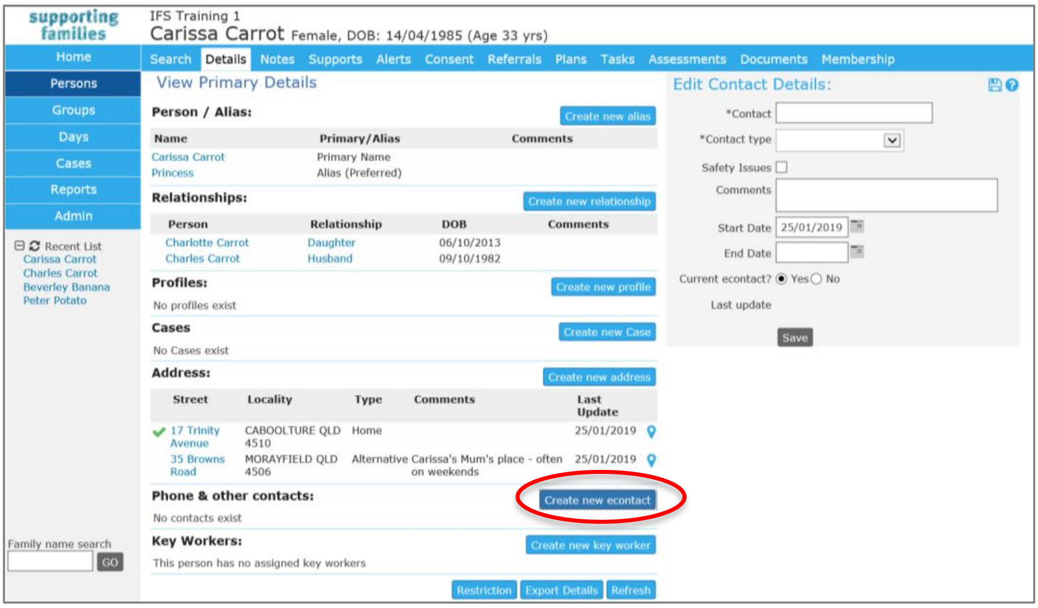
The **Details** tab will display as follows :


IFS Training 1
Carissa Carrot Female, DOB: 14/04/1985 (Age 33 yrs)
Search Details Notes Supports Alerts Consent Referrals Plans Tasks Asses
View Primary Details
Person / Alias:
Create new alias
Name Primary/Alias Comments
Carissa Carrot Primary Name
Princess Alias (Preferred)
Relationships:
Create new relationship
Person Relationship DOB Comments
Charlotte Carrot Daughter 06/10/2013
Charles Carrot Husband 09/10/1982
Profiles:
Create new profile
No profiles exist
Cases
Create new Case
No Cases exist
Address:
Create new address
Street Locality Type Comments Last Update
17 Trinity Avenue CABOOLTURE QLD 4510 Home 25/01/2019
35 Browns Road MORAYFIELD QLD 4506 Alternative Carissa's Mum's place - often on weekends 25/01/2019
Phone & other contacts:
Create new econtact
No contacts exist
Key Workers:
Create new key worker
This person has no assigned key workers
Restriction
Export Details
Refresh

4.7 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. (It makes sense to do this first). Selecting *Emergency Contact* will display a yellow alert icon against that contact.
4. If there are safety issues regarding use of a contact, by ticking the *Safety Issues* box, an orange alert icon will show against that contact.
5. Add **Comments** as relevant and useful.
6. Enter the **Start Date** by using the calendar icon.
7. If this is the current contact for the client set **Current econtact?** to Yes.
8. Select **Save**.
   To modify the Contact details, click on the Contact and the edit screen will display on the right hand side. Update the details and select **Save**.
   To cease a contact, enter an end date and **Save**. This will display in the View Prior view.

Phone & other contacts: Create new econtact | View Prior

Contact	Type	Comments	Last Update
4566 6554	Phone (Hm)	Don't leave messages	25/01/2019
carissa@carrot.com	Email		25/01/2019
4588 8881	Emergency Contact	Carissa's Mum - Celine	25/01/2019

Prior contacts

Contact	Type	Comments	Last Update
4688 7123	Phone (Hm)		25/01/2019

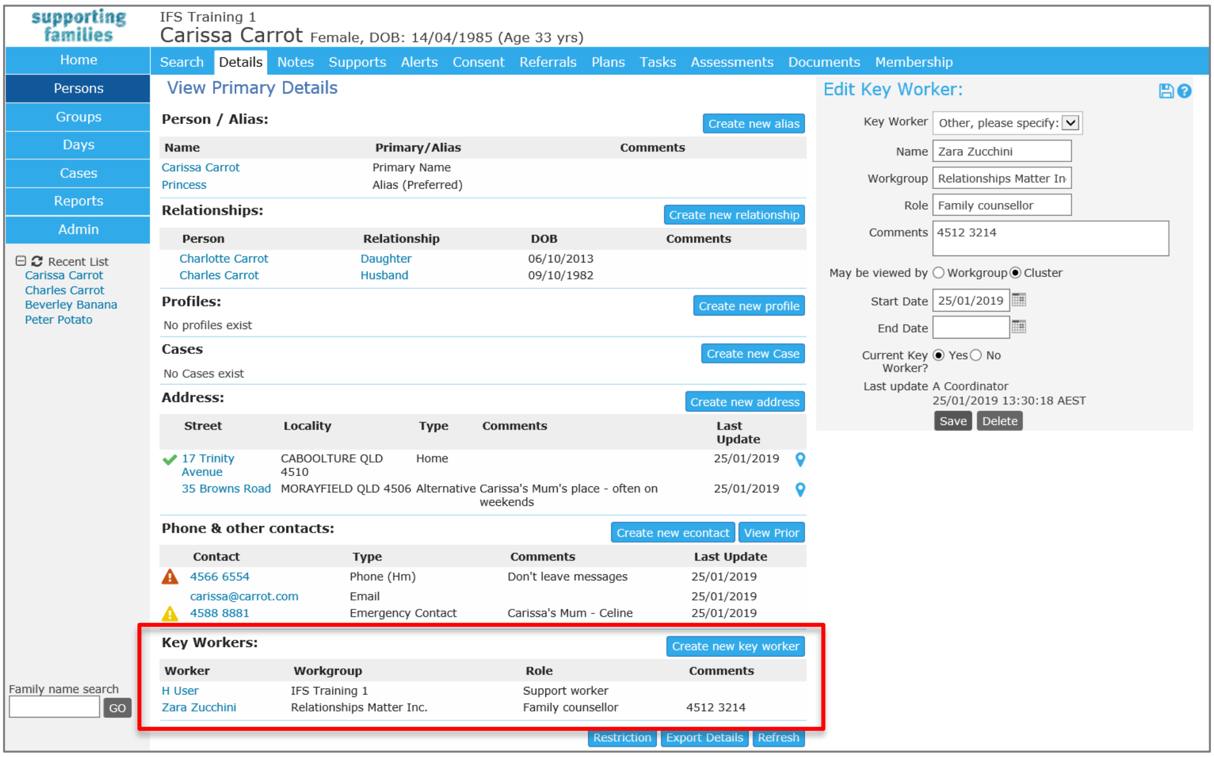
Additional Notes:

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

4.8 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. **<u>Note</u>**: Persons external to your workgroup, recorded as Key Workers, do not have access to ARC - their name is simply entered for information purposes only. When you create a new Key Worker, you have the option to record useful comments about the role of the key worker and his or her responsibilities.

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



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 with today's date upon Save.

TIP

Key worker (allocated on Person > Details) will display on the **My List** and **Team List** tabs on the **Home** Page.

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

Please refer to Section 5 for more information.

5 Cases / Case Summary

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

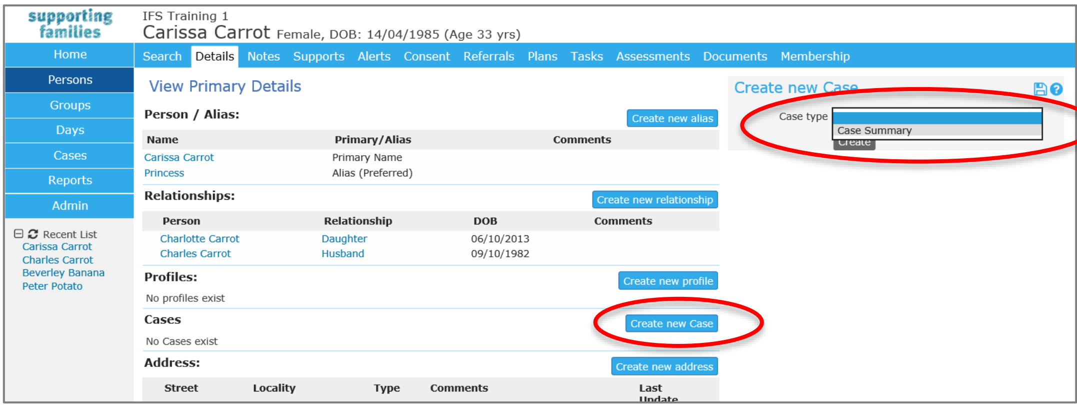
A Person can only be associated with one open Case Summary at any one time.

Case Summaries can be created in two ways:

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

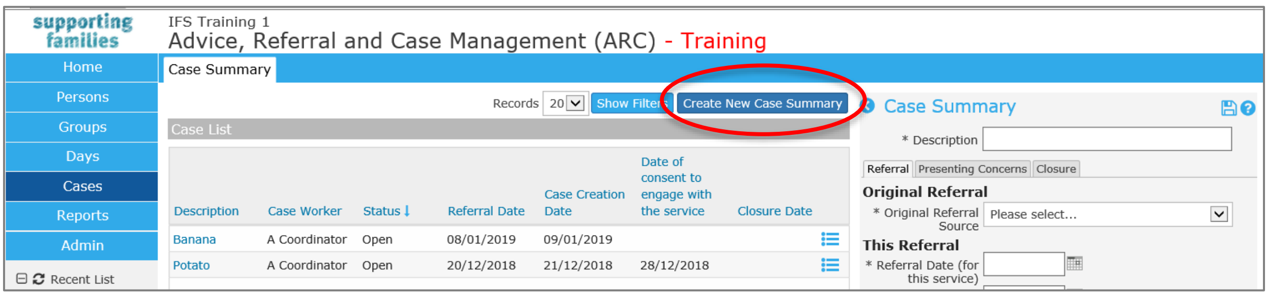
5.1 Create a Case / Case Summary from Persons page

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



5.2 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.

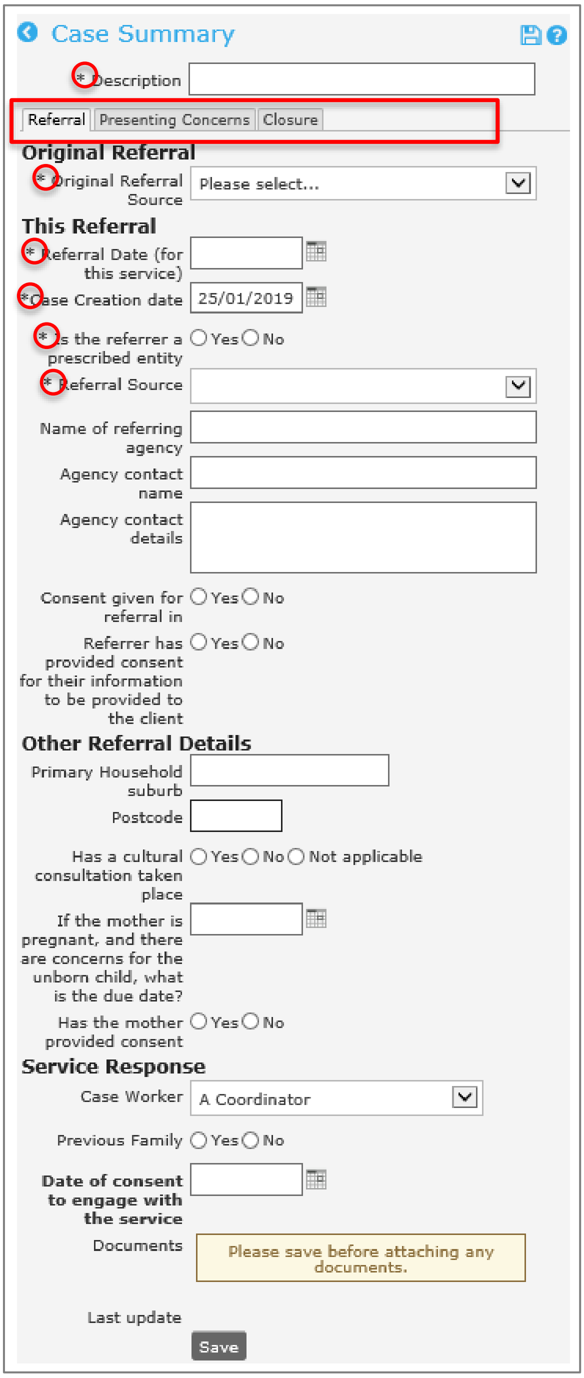


5.3 Complete Case Summary details

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 for the family in accordance with the naming protocol for your service.

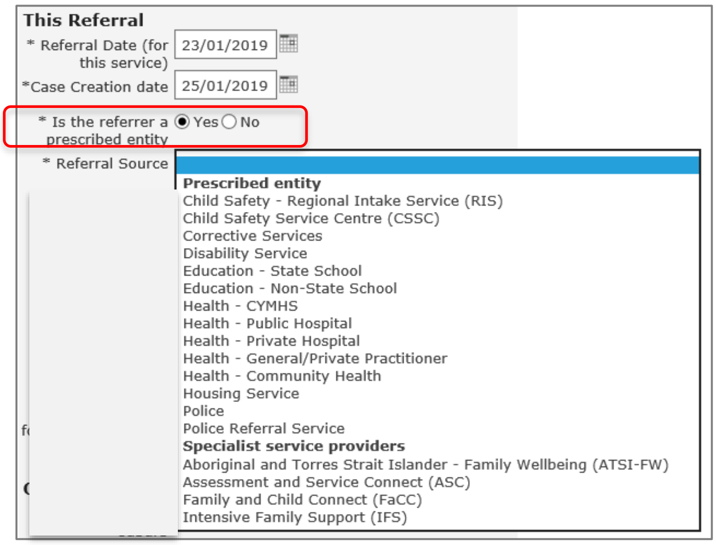
   The ***Referral*** sub-tab captures key data in **4** sections:
   - Original Referral
   - This Referral
   - Other Referral Details
   - Service Response.

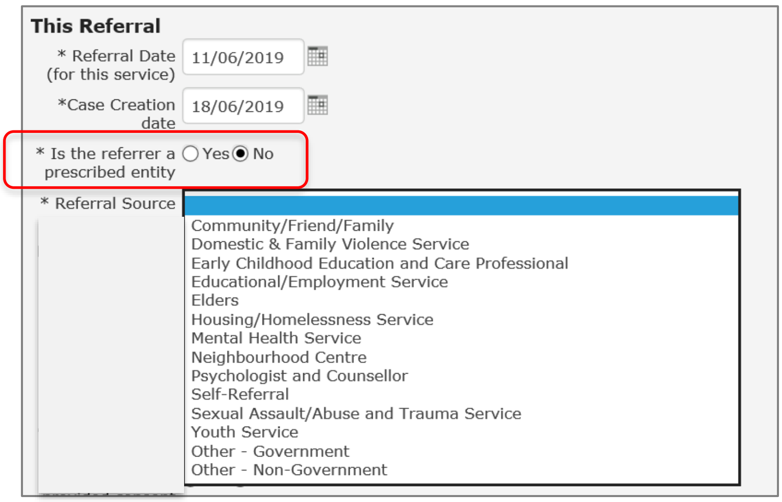
2. Record the **Original Referral Source** * details.
   The **Original Referral Source** is the first place the family was referred from (e.g. Police may refer a family to a Child Safety Regional Intake Service, who then refer to an IFS. The *Original Referral Source* is Police).

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.



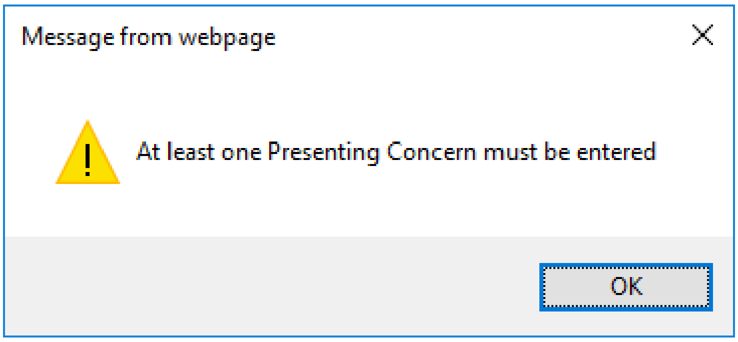


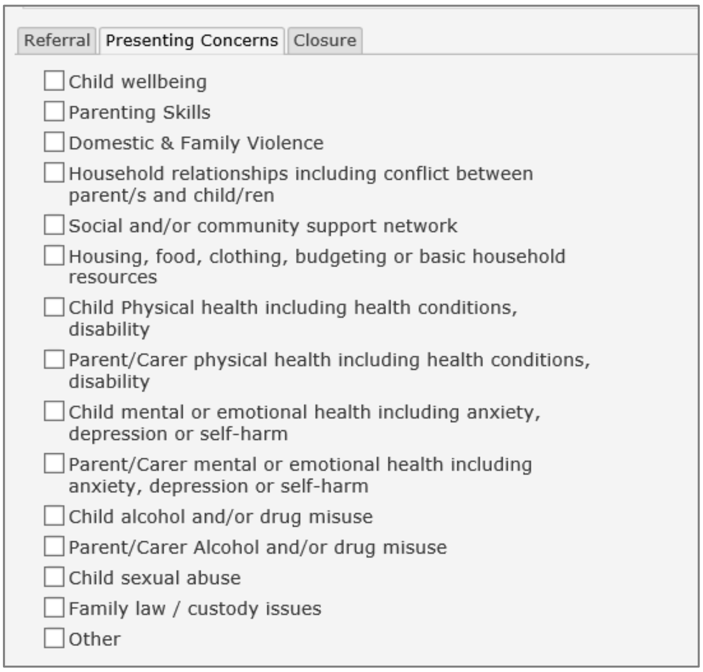
6. Select the **Referral Source*** from the drop-down list –i.e. who <u>you</u> received this referral from.

<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 Service Centre/Regional Intake Service* and the *Type of referral*

7. Select **Save**.

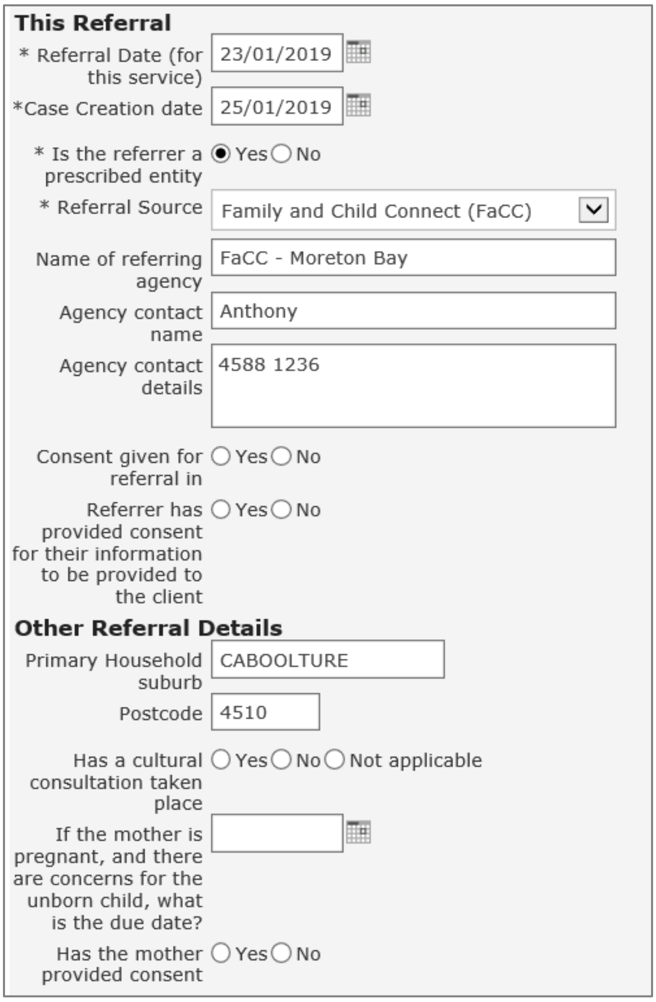
8. You will be prompted to complete the **Presenting Concerns** sub-tab.



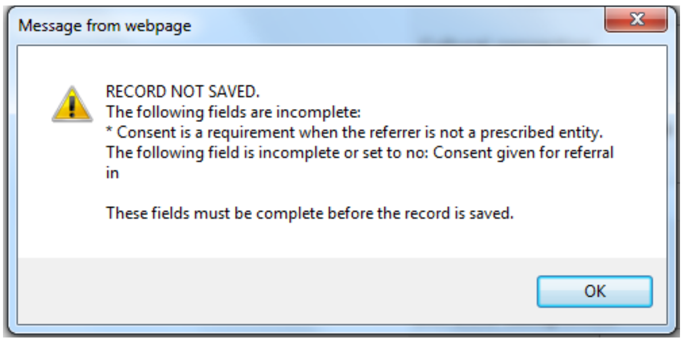


Complete the relevant check boxes and **Save**.

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

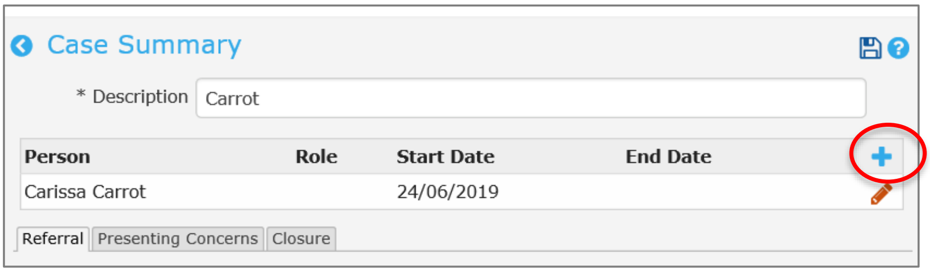


<u>Note :</u> If the referrer is <u>not</u> a prescribed entity, and **Consent given for referral in** is <u>not</u> completed or No, the following message will appear :



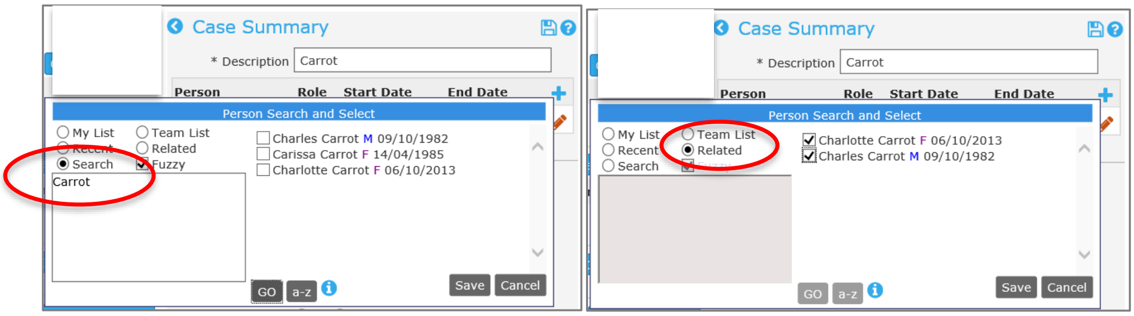
10. Select **Save**.

11. Attach the relevant **Persons** to the **Case Summary** by selecting the icon at the top of the form.



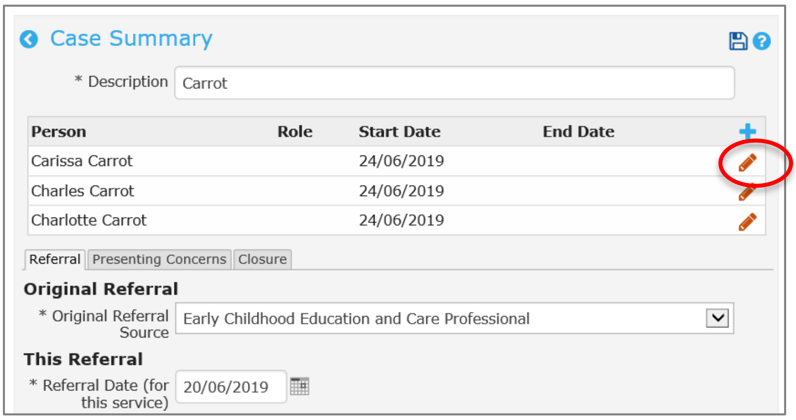
12. This will open the **Person Search and Selec**t pop up box.
Select the **Search** radio button, enter the client name in the white box, click **Go**.
Note: If you *Create new Case Summary* from the **Person** page, **Details** tab, you can use the **Related** button to identify relevant family members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

Search the required Persons to attach to the Case Summary (by ticking their checkbox) and click **Save**.



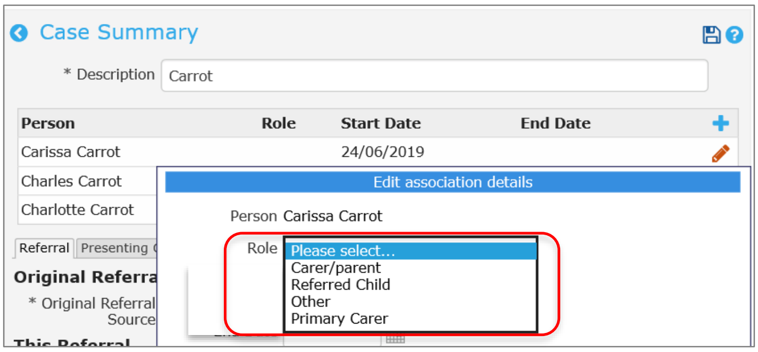
Click **Save.**

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

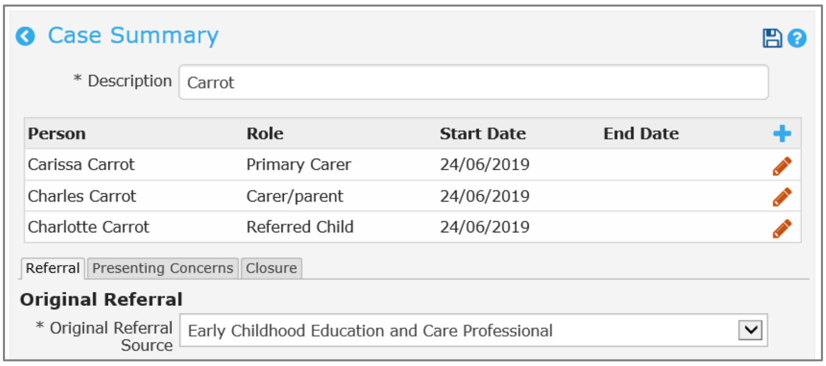


The **Start Date** reflected in the *Person* section defaults to today's date.
It can be manually changed to align with the **Case Creation Date** (if this is set to a date other than today's date) by clicking on the red crayon icon for each Person.

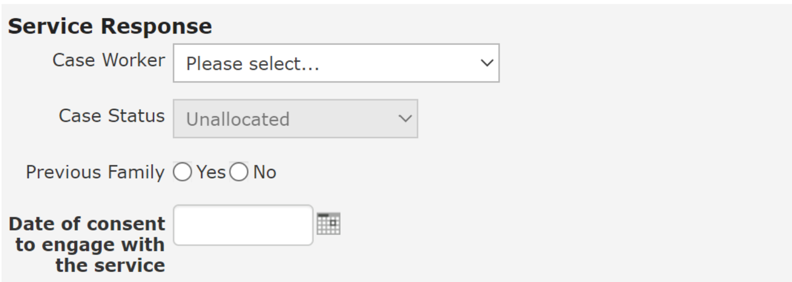
Click on the red crayon icon for each Person to assign their **Role**: in the **Edit association details** form, select the **Role** for the Person from the drop-down list, and click **Save**.



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



13. The **Service Response** section of the form contains <u>three very important fields</u>.



<u>Firstly,</u> the **Case Worker** and **Case Status** field. The Case Worker field has a drop down box of workers and under **Case Status** there are three options: Open, Closed and Unallocated.

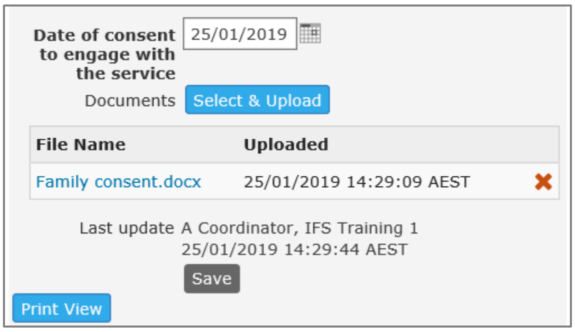
As the **Case Worker** field is updated, the **Case Status** field automatically updates (i.e. you are not required to select the case status). The case worker should <u>only</u> be selected when there is a worker who is able to commence actively engaging and working with the family.

Please note: This will be the field where all the data for the reports will be drawn, so it is important that this is recorded accurately.

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.

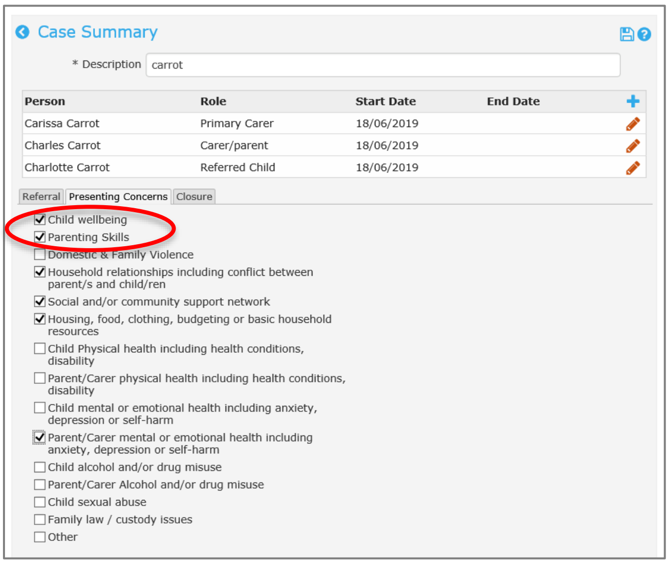
16. A scanned copy of the signed consent form and other documents relevant to the Case, can be attached as documents to the **Case Summary**.
Select the *Browse / Select and Upload* button or 'drag and drop' to attach the required documents.



TIP
Each **Case Summary** can be allocated to a **Case worker** – on the *Referral* sub-tab.
This displays in the **Cases** page and is very useful for filtering Case information. Simply click on the **Show Filters** button to choose the worker you wish to display Cases for. You can use the other filter options to refine the displayed results.

The **Key Worker** (allocated on Person > Details) will display on the **My List** and **Team List** tabs on the **Home** Page. It is recommended that **Key Worker** is only assigned for the Primary Carer in the Case - typically this is the same worker as allocated in the **Case worker** field on the Case Summary.

The ***Presenting Concerns*** sub-tab recognises the issues of concern for the family from the perspective of the referrer.



5.4 Close a Case / Case Summary

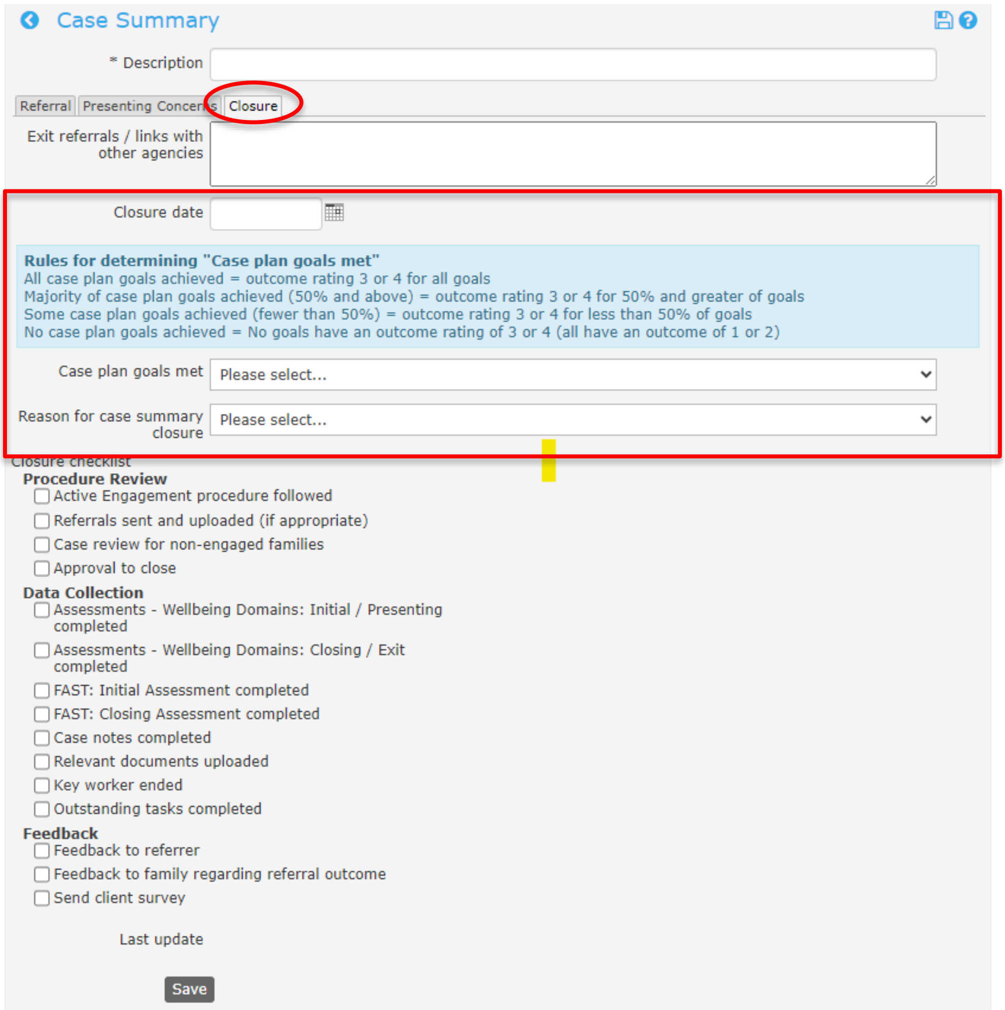
The accurate closure of the Case / Case Summary is very important for the integrity of service delivery and reporting for your service.

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.

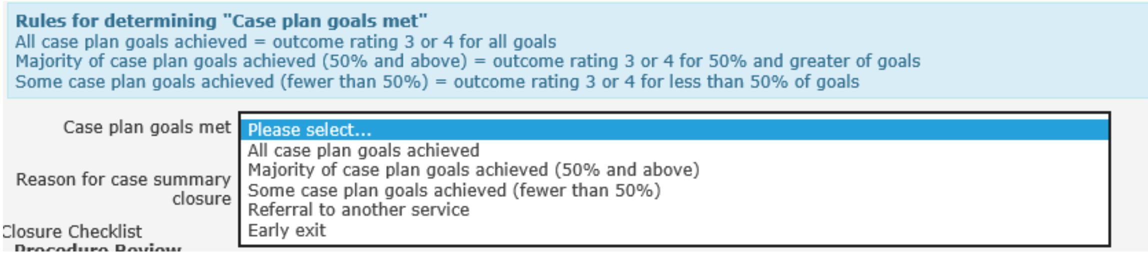
2. Open the **Closure** sub-tab.



3. As relevant, enter 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.
   NOTE: 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. Use the rules in the blue box to select the appropriate response (related to the outcomes recorded in the Plan)


Rules for determining "Case plan goals met"
All case plan goals achieved = outcome rating 3 or 4 for all goals
Majority of case plan goals achieved (50% and above) = outcome rating 3 or 4 for 50% and greater of goals
Some case plan goals achieved (fewer than 50%) = outcome rating 3 or 4 for less than 50% of goals

Case plan goals met: Please select...
All case plan goals achieved
Majority of case plan goals achieved (50% and above)
Some case plan goals achieved (fewer than 50%)
Referral to another service
Early exit

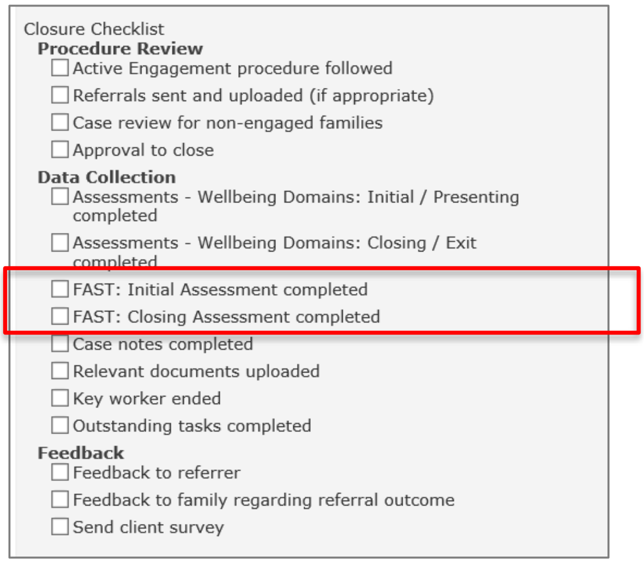
Reason for case summary closure

Closure Checklist

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*.**

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

<u>**VERY IMPORTANT NOTE**</u>: Data collection for the Assessments listed is mandatory. An *Initial* <u>and</u> *Closing* FAST Assessment must be completed prior to closing the Case Summary.


Closure Checklist

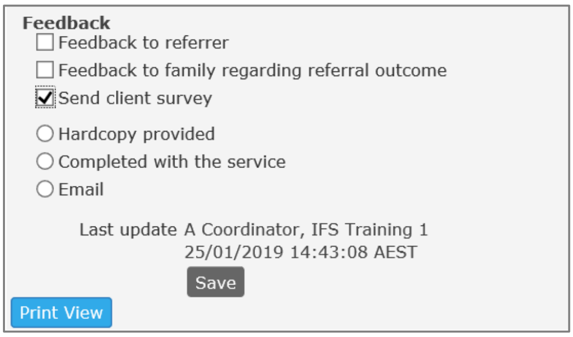
Procedure Review
- ☐ Active Engagement procedure followed
- ☐ Referrals sent and uploaded (if appropriate)
- ☐ Case review for non-engaged families
- ☐ Approval to close

Data Collection
- ☐ Assessments - Wellbeing Domains: Initial / Presenting completed
- ☐ Assessments - Wellbeing Domains: Closing / Exit completed
- ☐ FAST: Initial Assessment completed
- ☐ FAST: Closing Assessment completed
- ☐ Case notes completed
- ☐ Relevant documents uploaded
- ☐ Key worker ended
- ☐ Outstanding tasks completed

Feedback
- ☐ Feedback to referrer
- ☐ Feedback to family regarding referral outcome
- ☐ Send client survey

8. Select **Save.**

9. In the **Feedback** section, record how you have provided your client with the *Client Satisfaction Survey* :


Feedback
- ☐ Feedback to referrer
- ☐ Feedback to family regarding referral outcome
- ☑ Send client survey

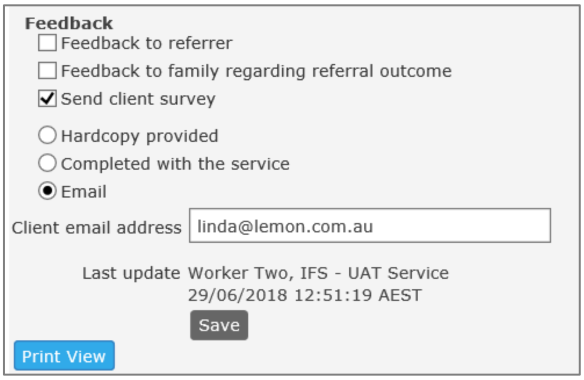
- ○ Hardcopy provided
- ○ Completed with the service
- ○ Email

Last update A Coordinator, IFS Training 1 25/01/2019 14:43:08 AEST

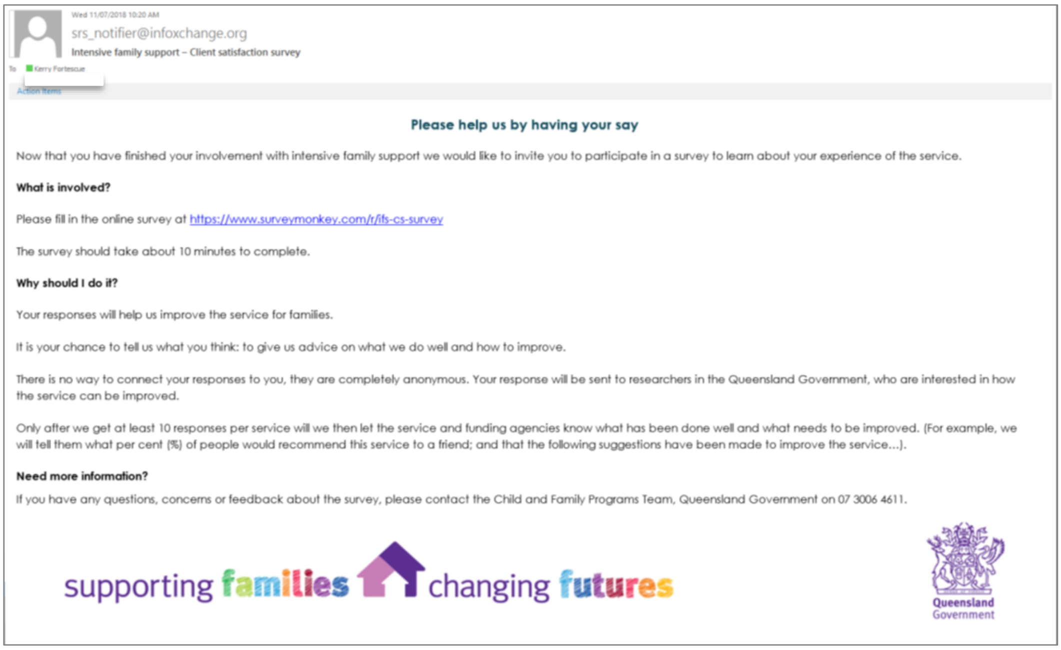
Save

Print View

Where email is available, enter the address.



When you click **Save** to close the Case Summary, the email (containing the link to the survey) will be scheduled for dispatch (actioned every 10 minutes). Only one email can be dispatched upon closure of the Case Summary. An example of the email received by your client is shown below, containing a link through to the survey:



srs_notifier@infoxchange.org

Intensive family support – Client satisfaction survey

Please help us by having your say

Now that you have finished your involvement with intensive family support we would like to invite you to participate in a survey to learn about your experience of the service.

What is involved?

Please fill in the online survey at https://www.surveymonkey.com/r/ifs-cs-survey

The survey should take about 10 minutes to complete.

Why should I do it?

Your responses will help us improve the service for families.

It is your chance to tell us what you think: to give us advice on what we do well and how to improve.

There is no way to connect your responses to you, they are completely anonymous. Your response will be sent to researchers in the Queensland Government, who are interested in how the service can be improved.

Only after we get at least 10 responses per service will we then let the service and funding agencies know what has been done well and what needs to be improved. (For example, we will tell them what per cent (%) of people would recommend this service to a friend; and that the following suggestions have been made to improve the service...).

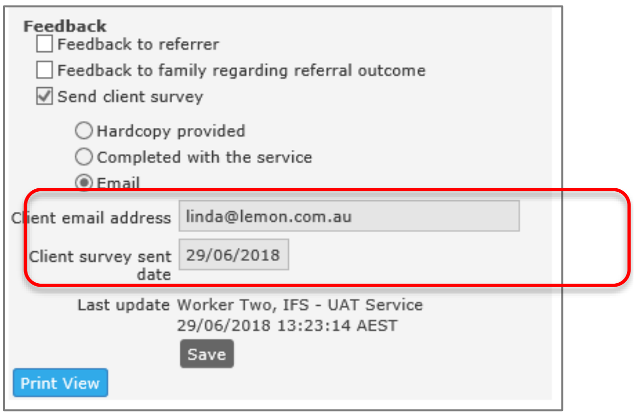
Need more information?

If you have any questions, concerns or feedback about the survey, please contact the Child and Family Programs Team, Queensland Government on 07 3006 4611.

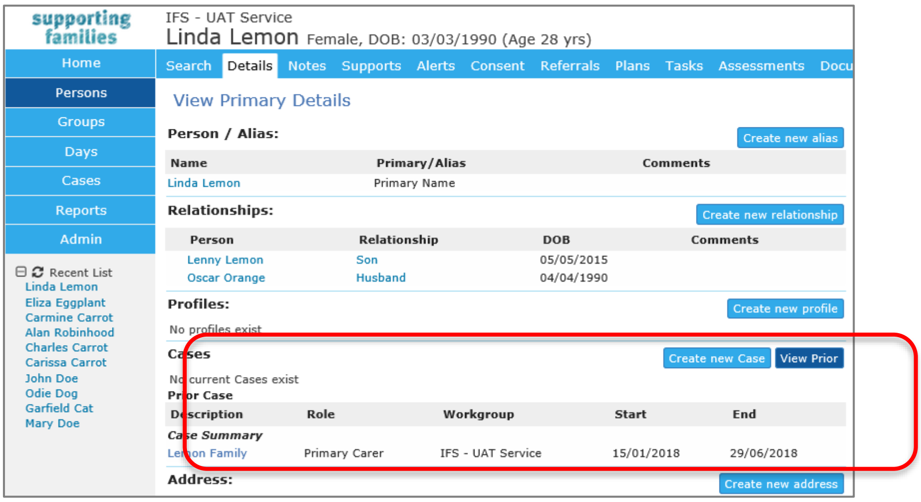
supporting families changing futures

Queensland Government

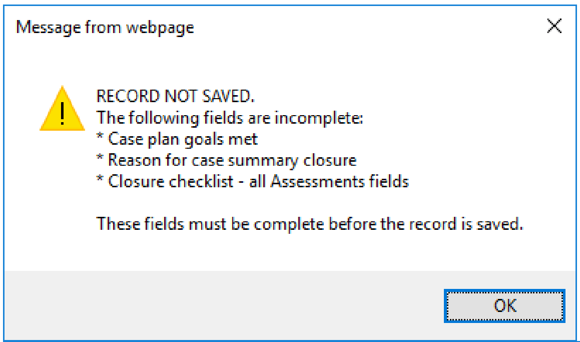
When it has been dispatched, the **Case Summary** will be updated with the date sent:

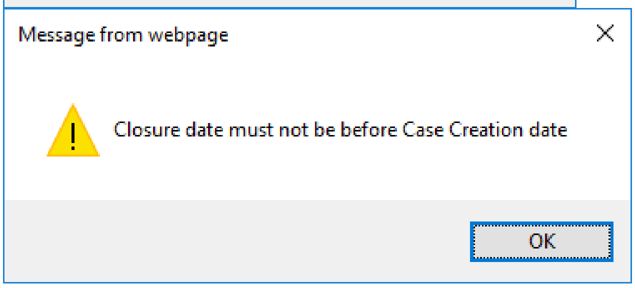


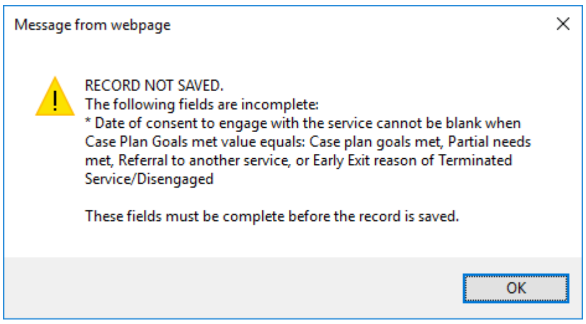
10. The Case Summary is now closed and available by clicking on the **View Prior** button.

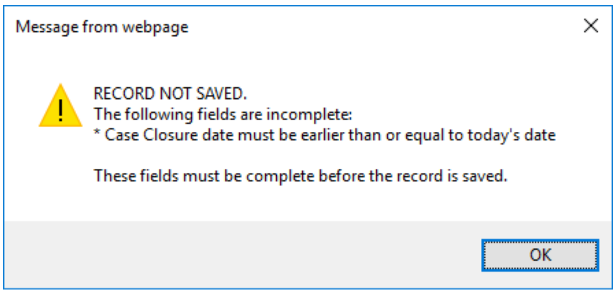


To promote data integrity, there are a number of validation messages which may appear:







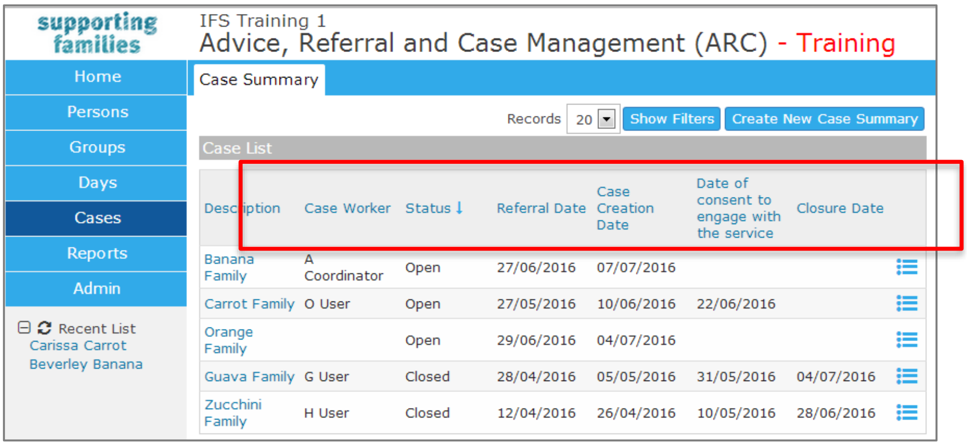


The following tasks are <u>also required to be completed upon Closure</u>:

- Close Case Plan – refer to the section [Close Plan]
- Close Key Worker – refer to the section [Close Key Worker]

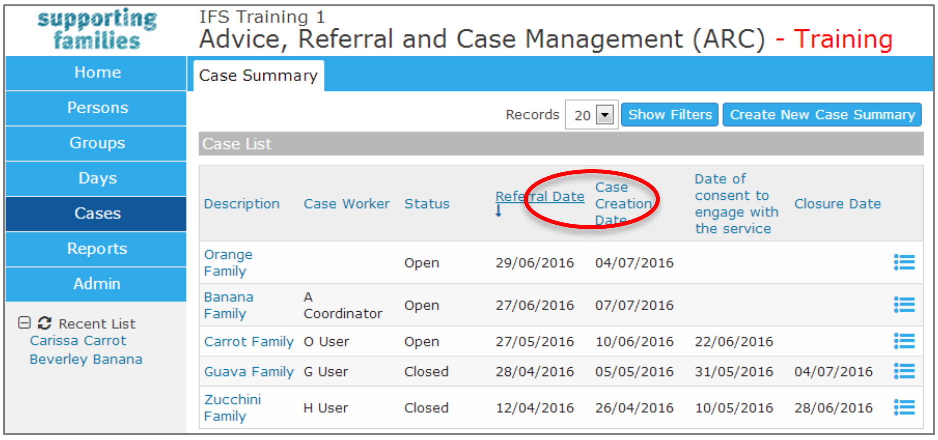
5.5 Managing Cases from the Cases Page

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



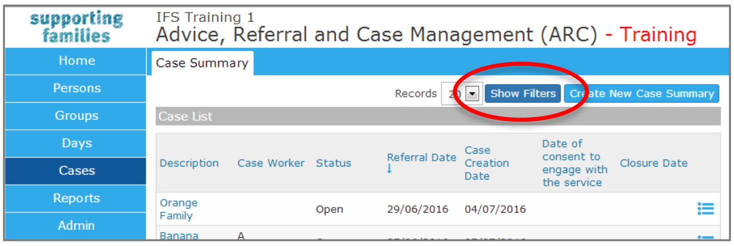
a) Order by column

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

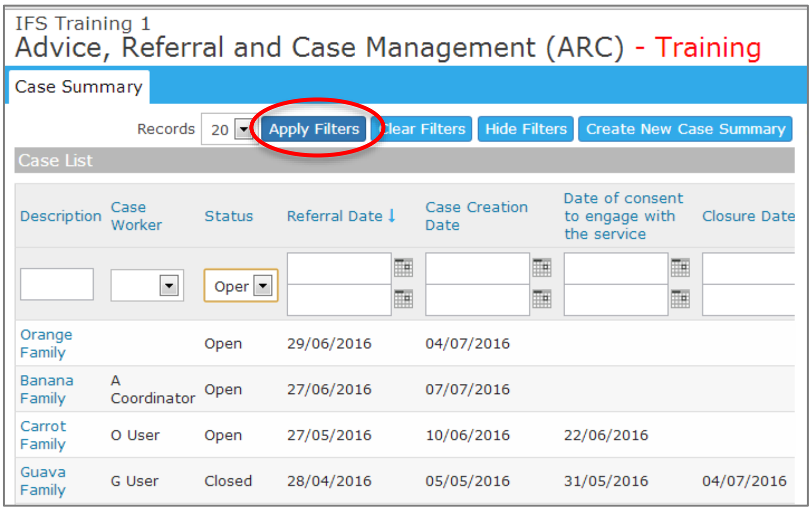


b) Apply filters

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



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

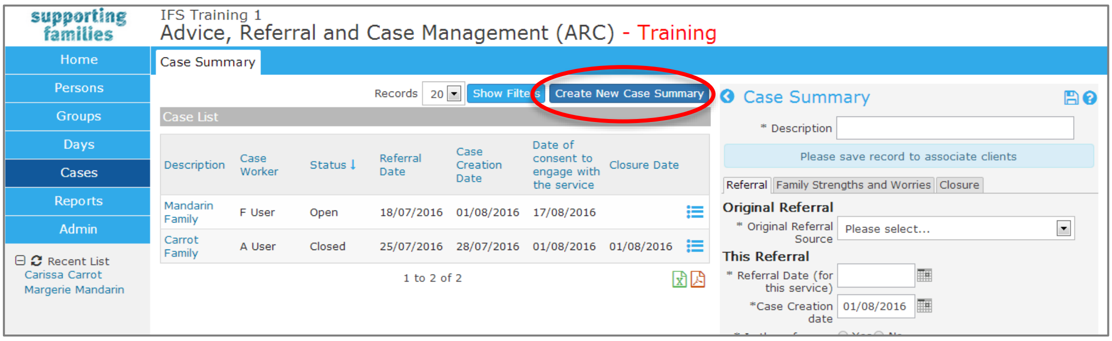


Clear Filters – will clear the previous values and enable you to tailor a new search.

Hide Filters – returns you to the List view.

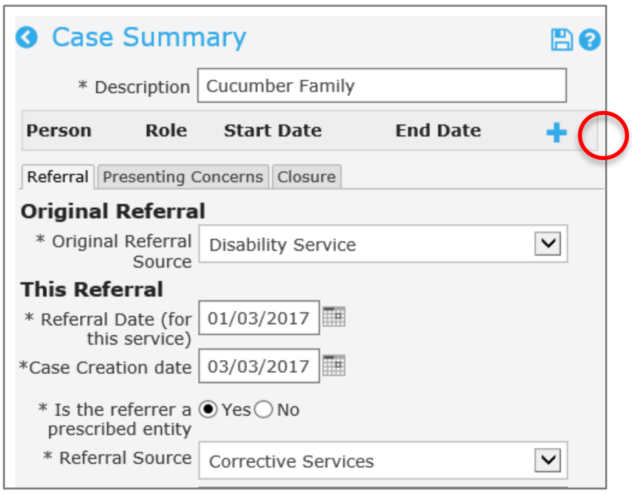
c) Create new Case Summary

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.



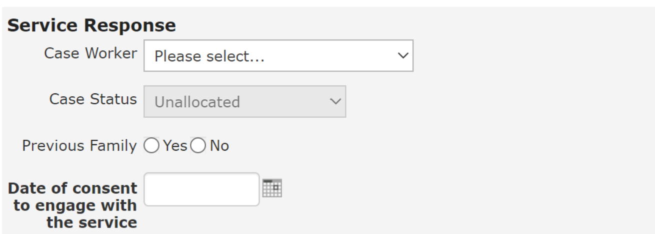
Simply complete the 6 mandatory (*) data fields and click **Save**.

It is <u>CRITICAL</u> to attach Person records (including the relevant children) to the Case Summary.



The **Person** section will appear (after the Case Summary is saved) and the  icon can be used 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.** In this field, the case worker should <u>only</u> be selected when there is a worker who is able to commence actively engaging and working with the family.

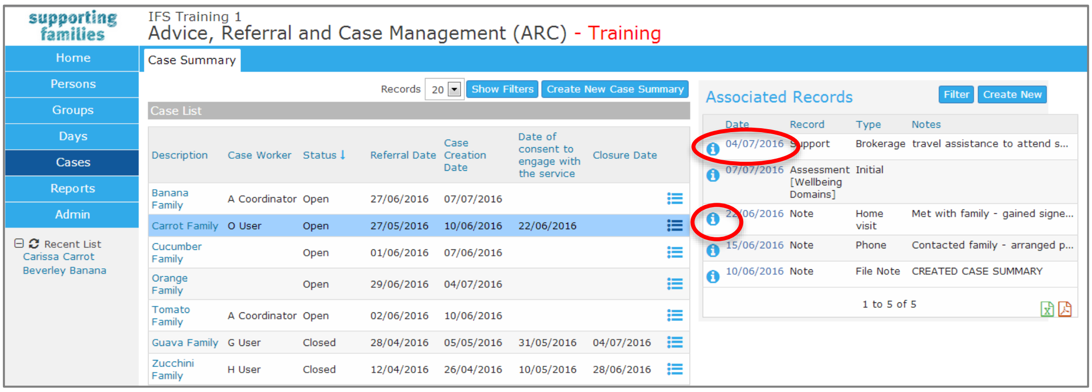


d) View associated records

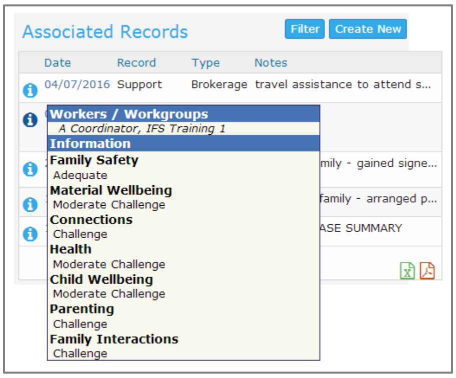
The icon on the list view of the **Cases** Page opens a short-cut to Notes, Supports, Assessments and documents associated with the Case Summary.

__NOTE :__ **Plans** and **Referrals** must still be accessed from the **Persons** page.

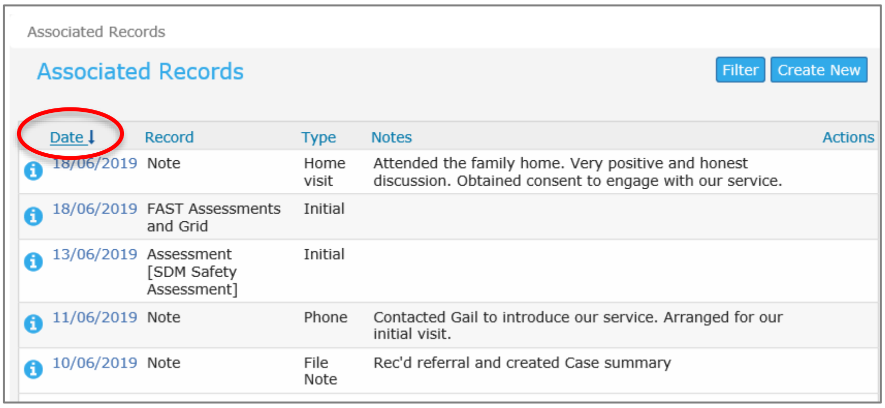
The individual forms can be opened by clicking on the date link.



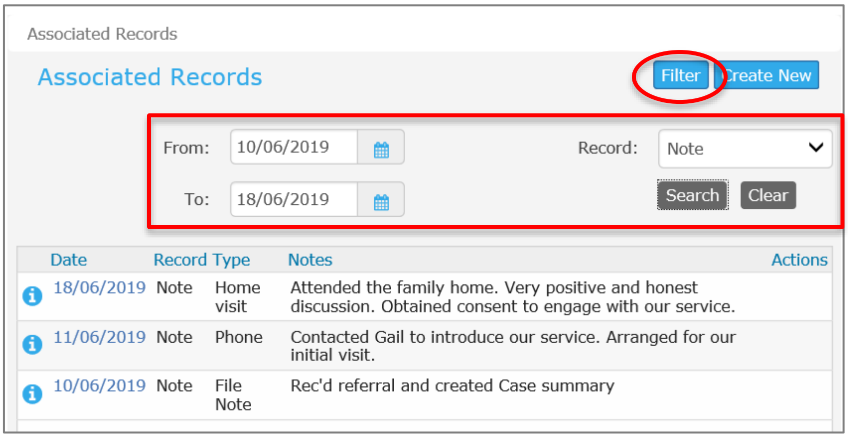
The button provides a snapshot of the relevant data pertaining to that record.



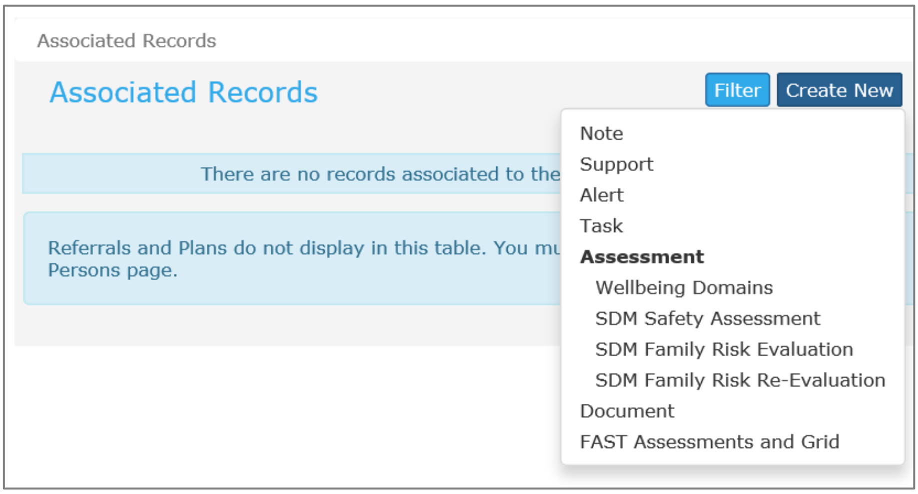
The display of records can ordered by clicking each column – with the arrow indicator appearing. Simply click again to reverse the order.



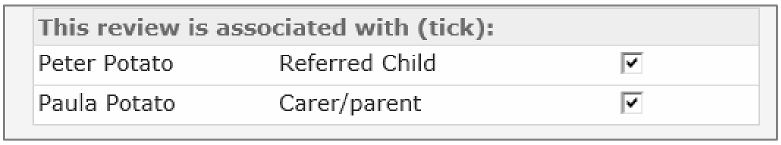
The **Filter** button enables you to define the parameters of your search.



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



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.



6 Record Consent

The *Service Model and Guidelines* for Intensive Family Support 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 can be captured in two places:

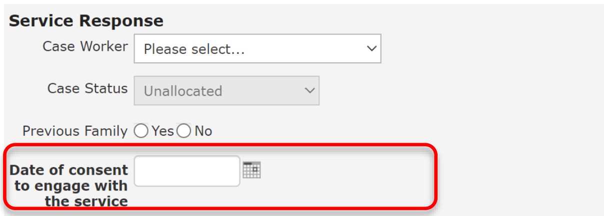
1. On the **Case Summary**, ***Referral*** sub-tab
   – **Date of Parent/Carer consent to engage with the service**
   – this field is used for reporting purposes; and
2. In the **Consent** tab on the Person record.

To record consent :

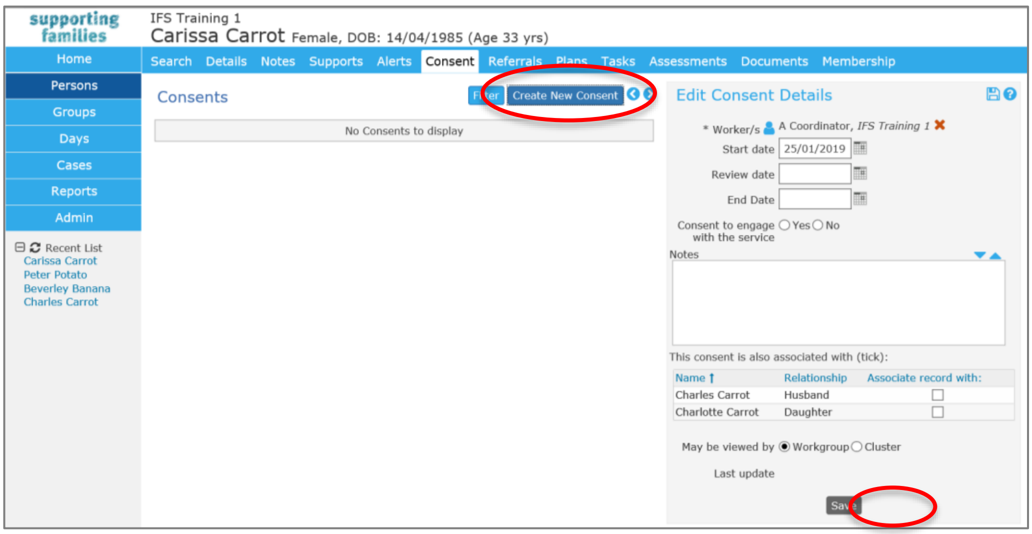
1.

The **Date of Parent/Carer consent to engage with the service** must be recorded on the **Case Summary** – *Referrals* sub-tab.

This field is used for reporting purposes for your service.

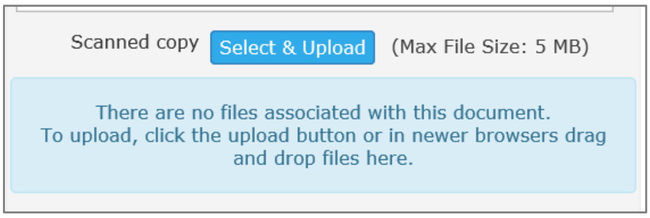


2. If required by the procedures determined for your service, consent may **then** be updated on Person records (on **Persons** page > **Consent** tab). Click **Create New Consent**



3. Complete fields as required and click **Save**.

4. 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.

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

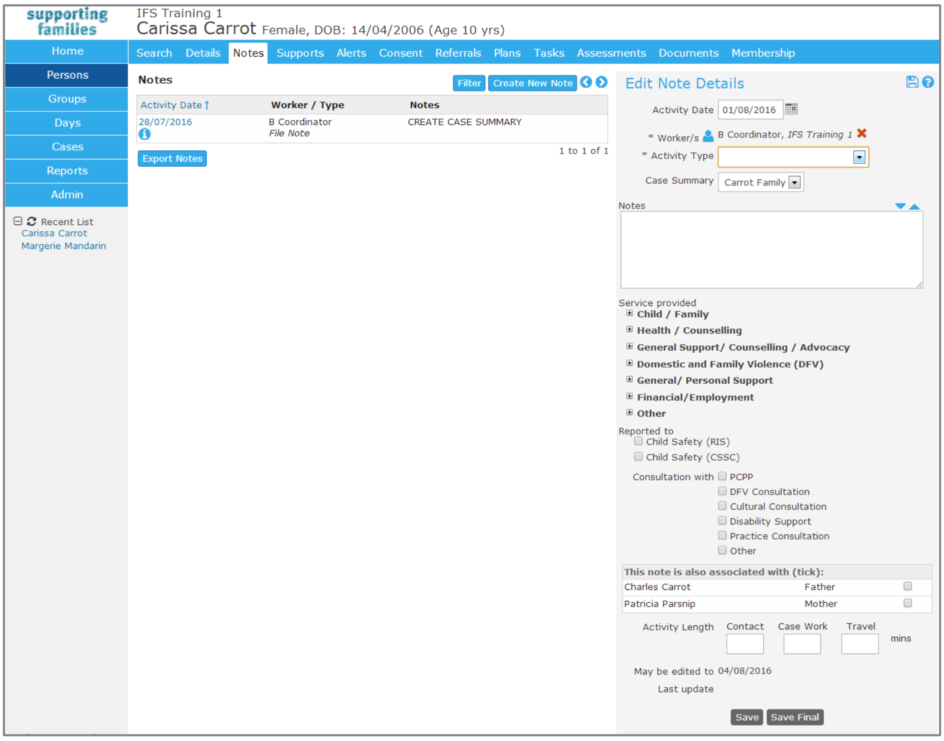
6. To close / **End Date** consent on a Person record, open the Edit Consent Details form, record an **End Date** and select **Save**.

7 Add Notes

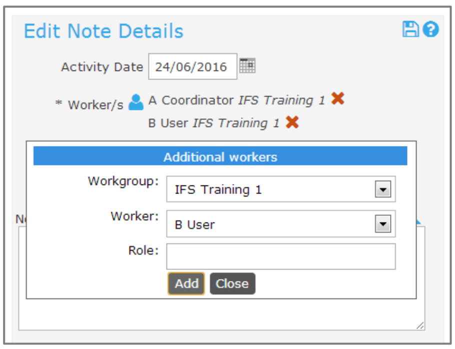
Notes (located in the **Persons** page, **Notes** tab) are important for capturing time spent by the worker/s.
The definitions for each category of **Activity length** * are:

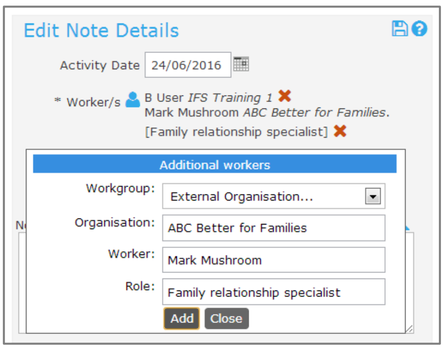
- *Contact*: direct time spent with the client
- *Case Work*: time spent on behalf of the client
- *Travel*: other travel undertaken with or on behalf of a client (including travel to meetings with clients, without them in the car).

1. From the **Person** page, select the **Notes** tab.
2. Click **Create New Note**.

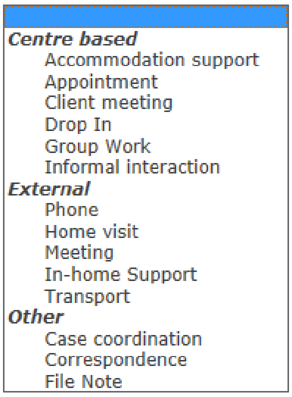


3. Enter **Activity Date** of note (can be backdated).
4. Add **Worker/s**. The worker will default to the user entering the data. Additional workers can be added by selecting the icon. External workers can be added to the note to record their attendance (Persons external to your service do not have access to ARC).



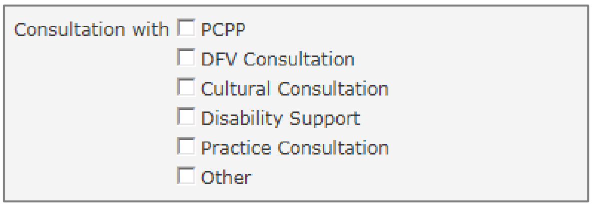


5. Select the relevant **Activity type** from the list. E.g. Client meeting or Home visit.

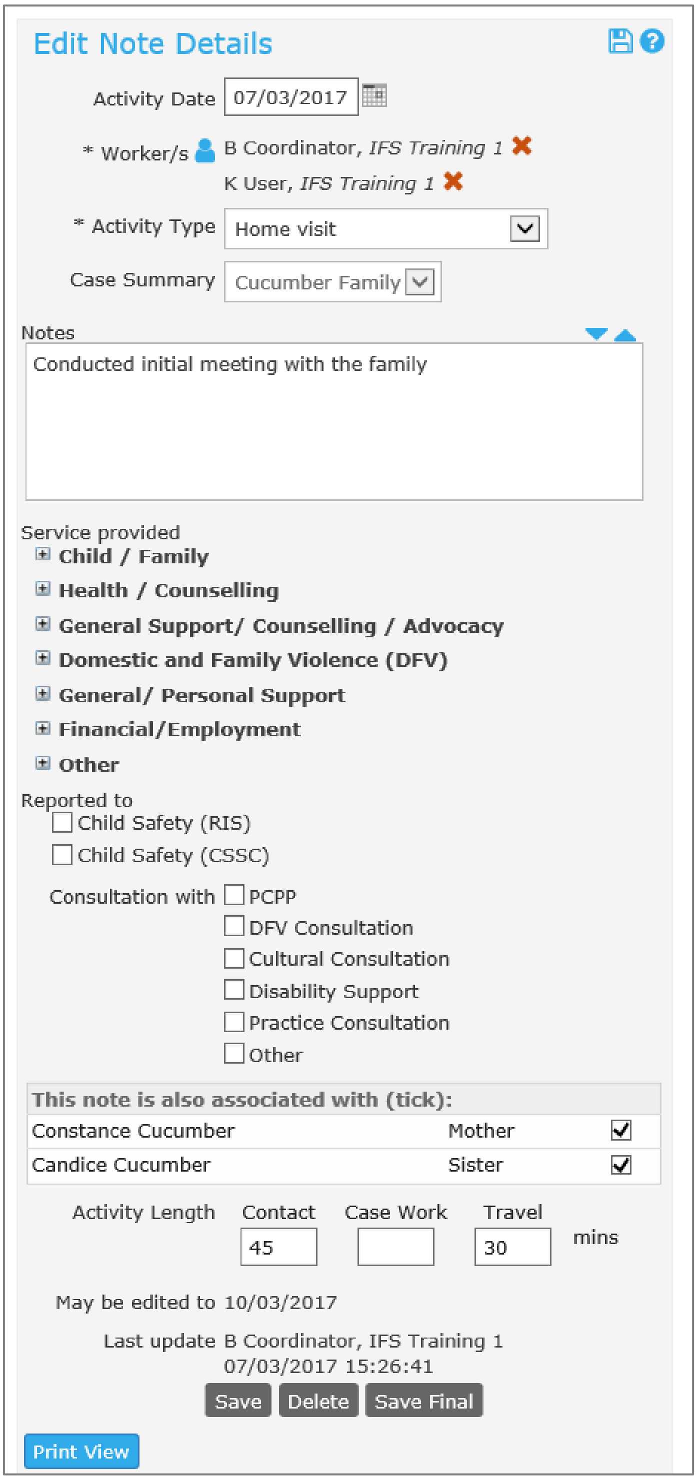


6. The **Case Summary** field will display the active **Case Summary** for this Person.
7. Record any relevant comments in the **Notes** box.
8. The check boxes for *Service provided* offer a short-cut to record the nature of the activity.
9. Select if the details of the Note have been **Reported to** 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.

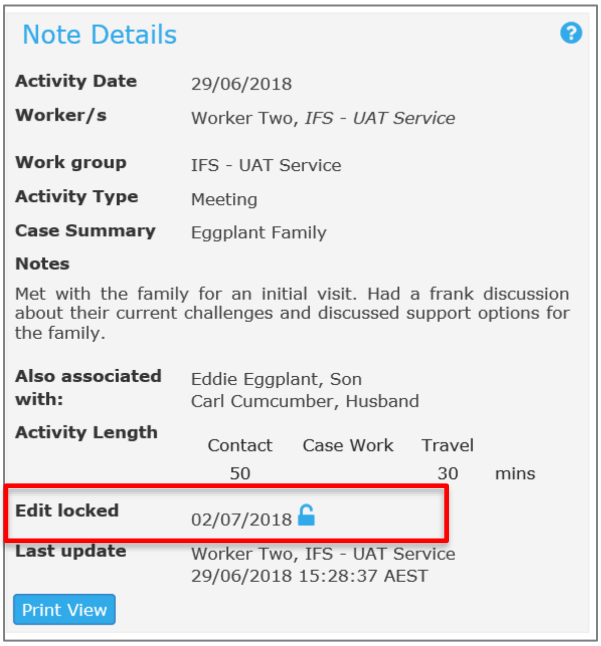


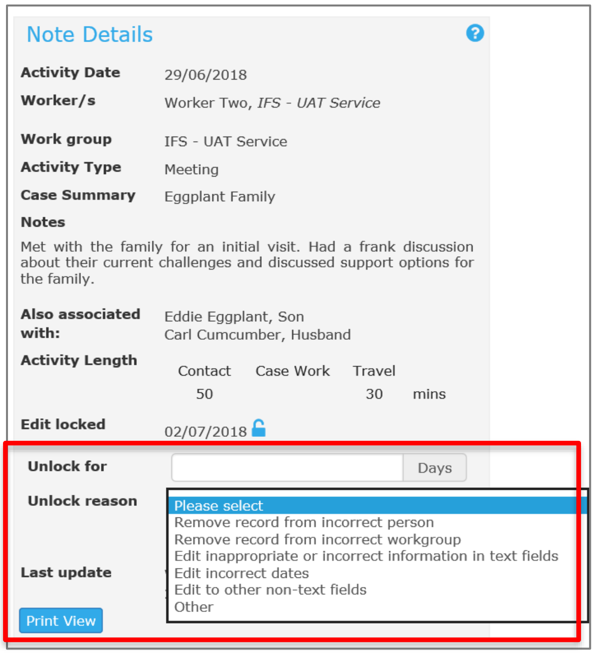
11. If the note is associated with other persons in ARC that are associated/related to the client select the person from the **This note is also associated with** section. Refer section Create Relationships for more information on creating relationships.
12. Enter the time spent with or on behalf of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



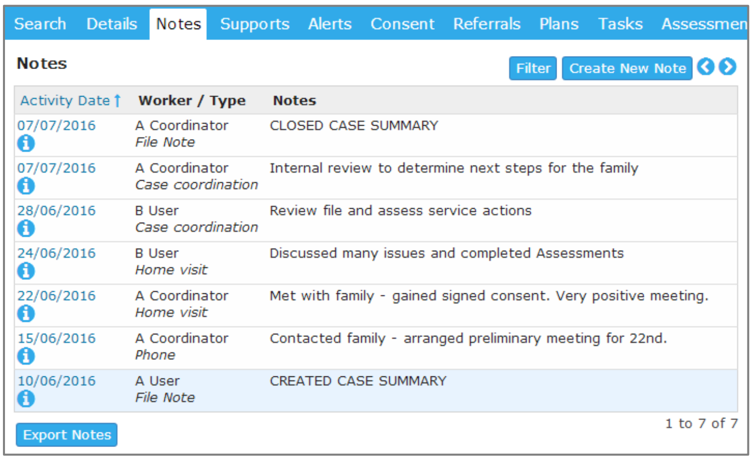


Simply click the **blue** unlock icon, then..

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**
3. Click **Save.**

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 upon the creation and closure of the Case Summary may be useful.



8 Assessments

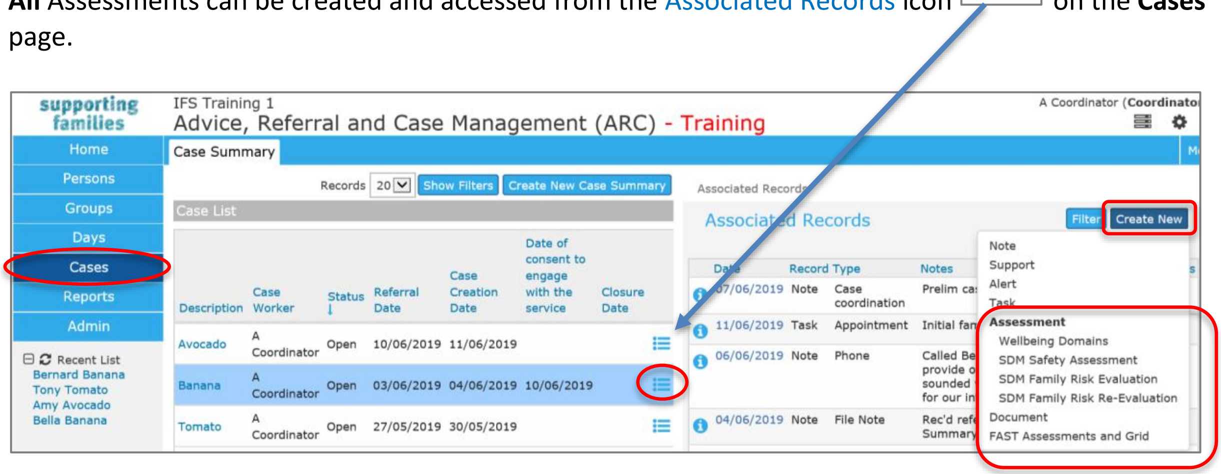
8.1 Record Assessments

The results from each of the following Assessments are recorded in ARC:

- Family Assessment Summary Tool (FAST)
- SDM Safety Assessment

The full documents for each of these Assessments are available from the **Documents** tab on the **Admin** page.

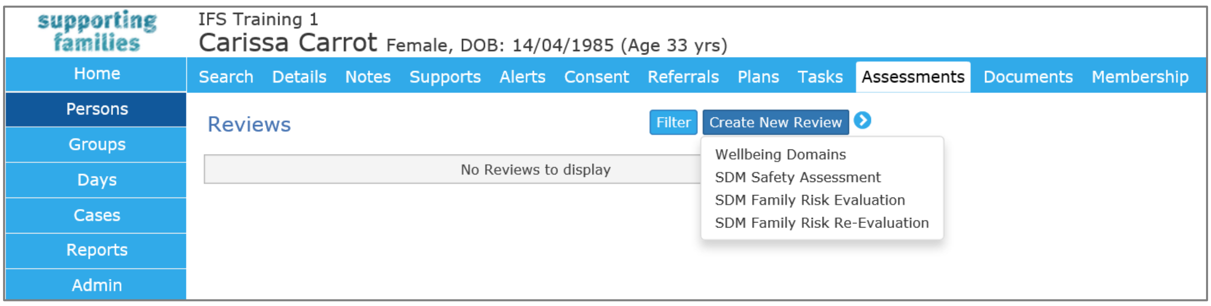
All Assessments can be created and accessed from the Associated Records icon  on the **Cases** page.



** FAST Assessments can only be accessed from Associated Records on the **Cases** Page.

The other Assessments are also available from the **Assessments** tab, on the **Persons** page/record. Click **Create New Review** button to select the required Assessment.

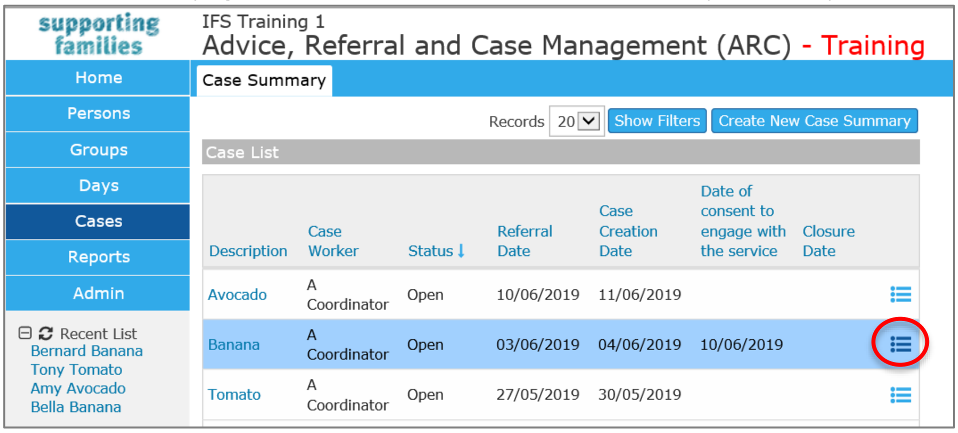
1. On the **Persons** page, select the **Assessments** tab
2. Select **Create New Review** and choose the assessment you wish to create.



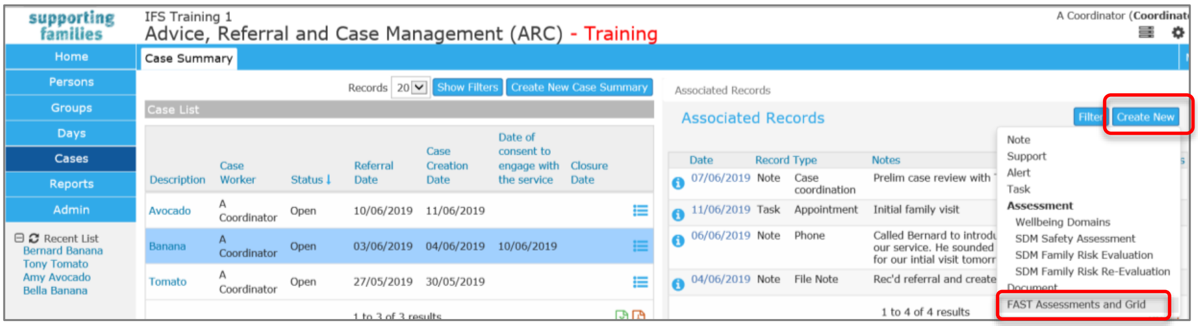
8.2 FAST Assessment and Grid

The Family Assessment Summary Tool (FAST) is implemented through the completion of the Adult and Child wheels, as appropriate, to provide a rigorous and balanced assessment of strengths and challenges with families. The results of these assessments (wheels) are recorded in ARC and collated for review in a Grid.

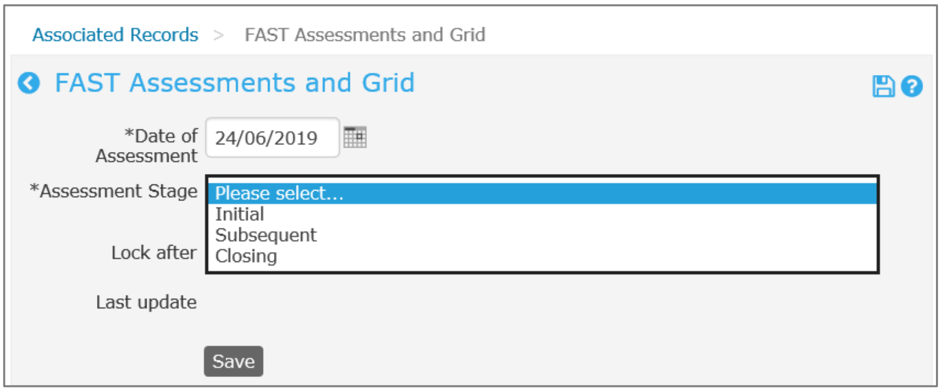
1. From the **Cases** page, click the Associated Records icon for your family Case.



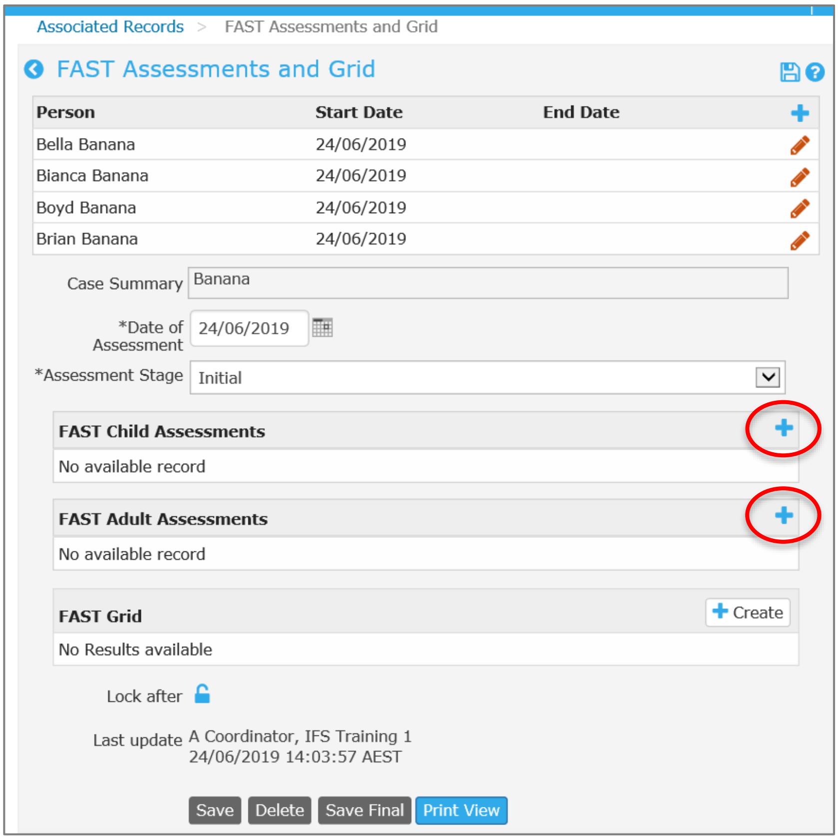
2. Click Create new and select **FAST Assessments and Grid**



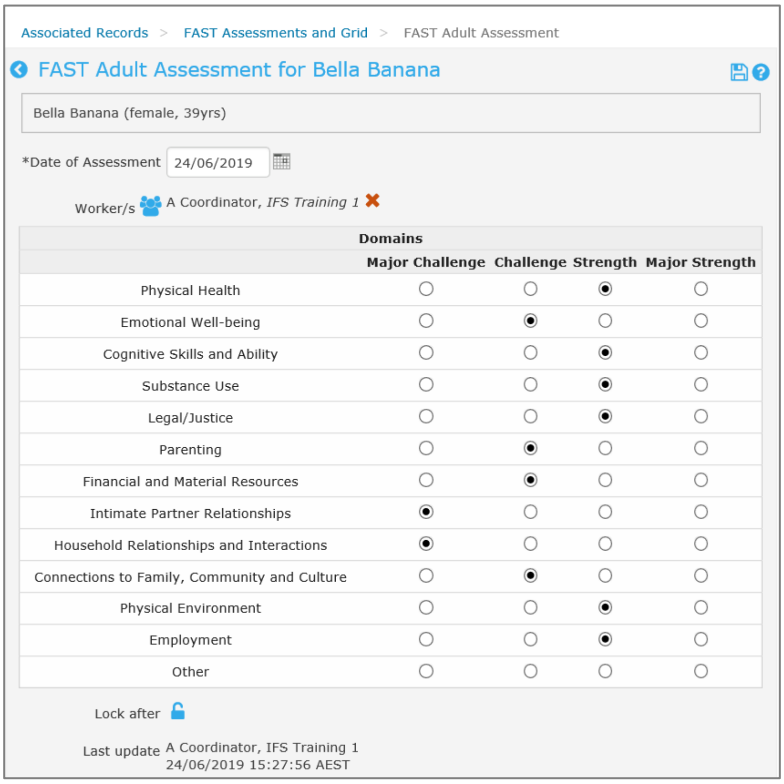
3. Select the Assessment Stage for your results: *Initial*, *Subsequent* or *Closing*
Click **Save**.



4. The **FAST Assessments and Grid** record displays.
To record the assessment results, click on the blue cross for Child Assessments and Adult Assessments, respectively

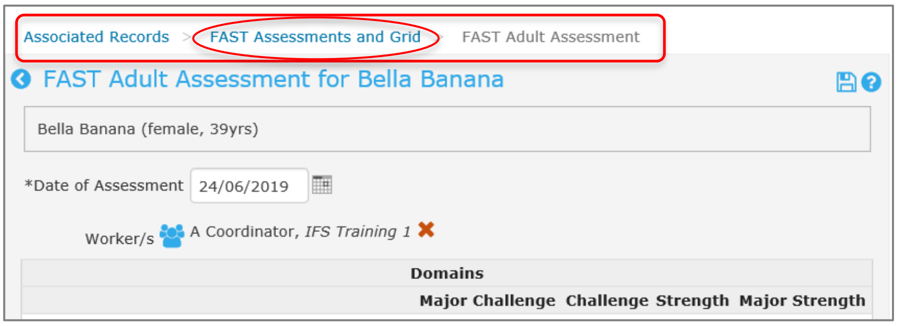


5. For each person, record the results from your completed wheel using the radio buttons.

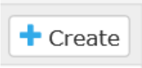


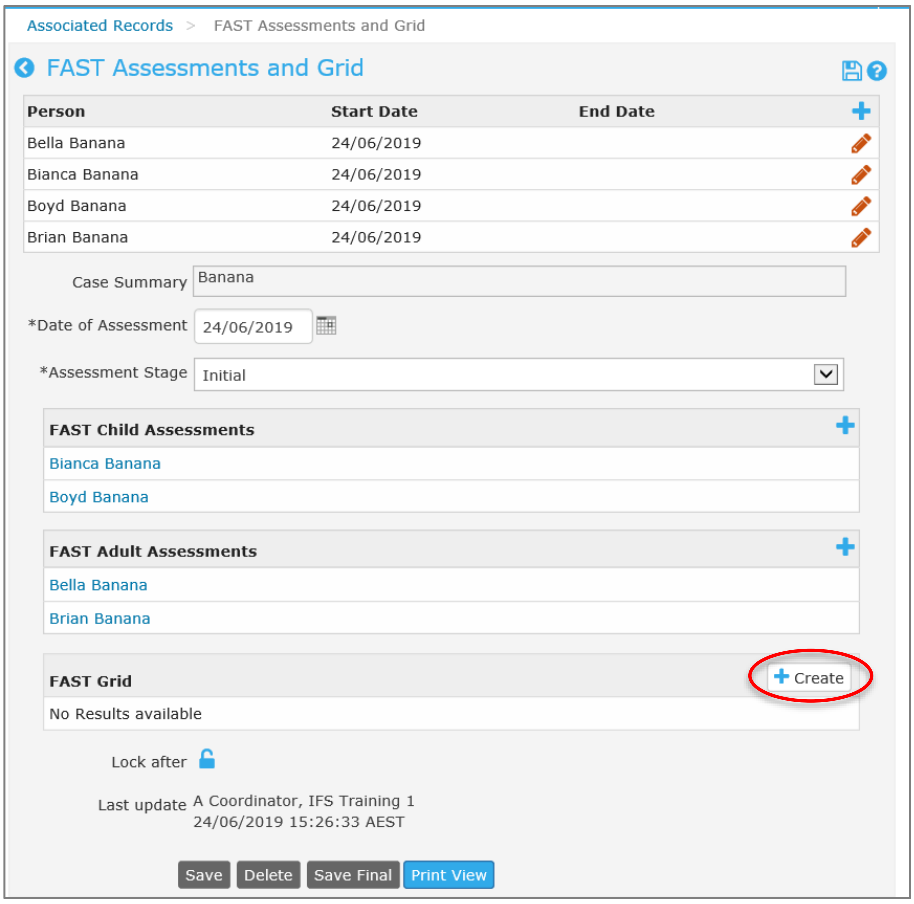
Click **Save**.

6. Using the breadcrumb trail at the top of the form, click **FAST Assessments and Grid** to complete recording the results of the wheels.



Click the blue cross for Child Assessments and Adult Assessments, as relevant, to record the assessment results for the persons in your Case.

7. When you are ready to review the results of your assessments (collated in the Grid), click 



The following will display

8. Click  to display the Grid :

FAST Grid

FAST Assessments and Grid

Created at	01/07/2019 11:54:06
Created by	Worker Two
Case Summary	Banana
Date of Assessment	24/06/2019
Assessment Stage	Initial

Adult grid

Domain	Brian Zucchini	Bella Banana
Physical Health	S	S
Emotional Well-being	C	C
Cognitive Skills and Ability	C	S
Substance Use	MC	S
Legal/Justice	C	S
Parenting	MC	C
Financial and Material Resources	MC	C
Intimate Partner Relationships	MC	MC
Household Relationships and Interactions	MC	MC
Connections to Family, Community and Culture	MC	C
Physical Environment	S	S
Employment	MC	S
Other Domain:		

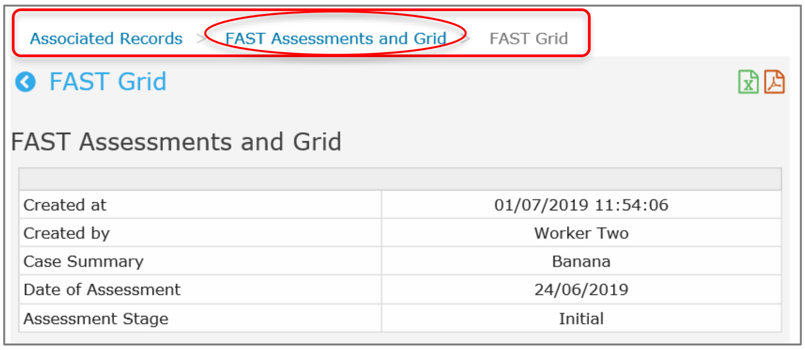
Child grid

Domain	Bianca Banana	Boyd Banana
Emotional Well-being	C	S
Child Development, Cognitive Skills and Abilities	C	S
Education, Training and Employment	C	S
Connections to Family, Community and Culture	C	S
Peer Relationships	C	S
Household Relationships and Interactions	MC	S
Physical Health	S	C
Substance Use	S	S
Actions and Behaviours	C	S
Other Domain:		

You can easily print the Grid using the pdf button at the top.

[Note - colour is not retained using the Excel export]

9. Use the breadcrumb trail at the top of the form to return to the **FAST Assessments and Grid**.



Associated Records > FAST Assessments and Grid > FAST Grid

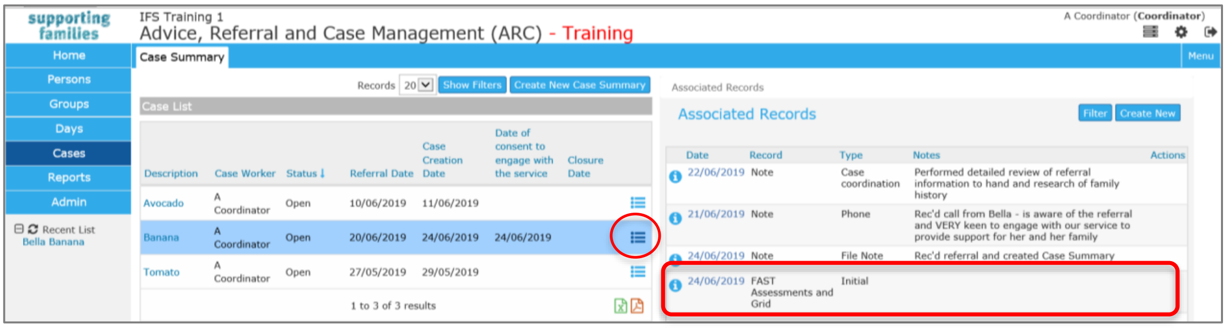
FAST Grid

FAST Assessments and Grid

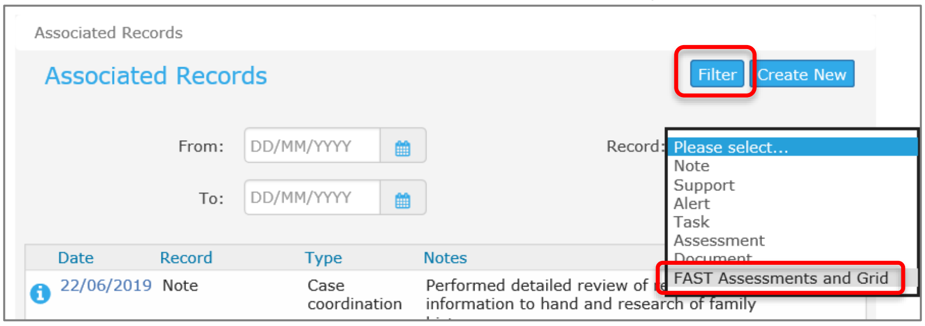
Created at	01/07/2019 11:54:06
Created by	Worker Two
Case Summary	Banana
Date of Assessment	24/06/2019
Assessment Stage	Initial

If any errors were made in recording the results from the wheels, the Grid can be deleted, the assessments accessed and amended as necessary and the Grid created again.

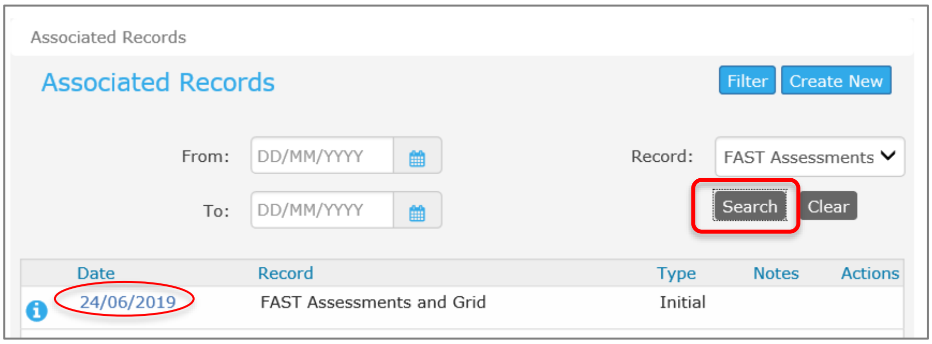
10. Completed **FAST Assessment and Grid** records are 'filed' and accessed from **Associated Records** for your family Case, from the Cases page.
Simply click the blue date to open the record.



11. Using the Filter enables you to easily locate these records.
Click Filter and select the **FAST Assessment and Grid** option.



12. Click **Search**

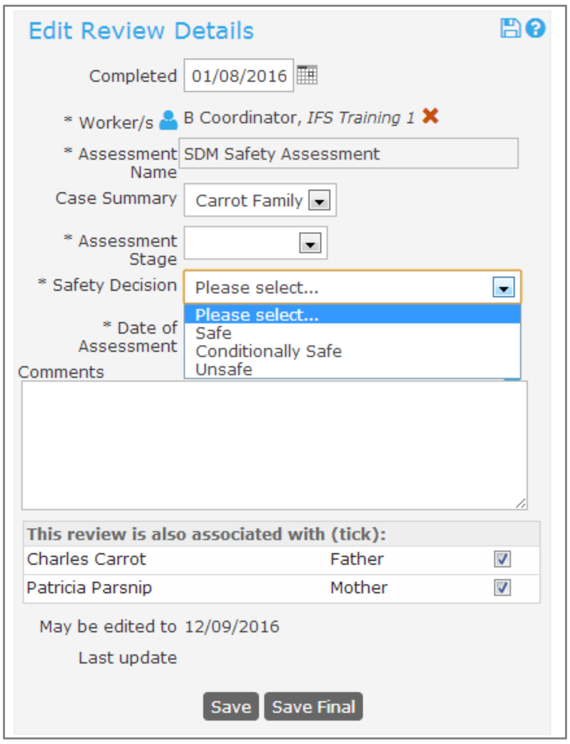


All **FAST Assessment and Grid** records will be displayed.
Simply click on the blue date to open the record.

8.3 Complete *SDM Safety Assessment*

<u>Note</u>: The *SDM Safety Assessment* in ARC is captures the outcome of the assessment for reporting purposes. The assessment, completed in accordance with *Program Guidelines*, is to be completed for each household.

1. Select **SDM Safety Assessment** from the **Create New Review** list
2. Enter **Completed*** date (can be backdated).
3. 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
4. Select **Assessment Stage***: *Initial* for entry assessment, *Subsequent* for a review and *Closing* for exit assessment
5. Record details for:
   - **Safety Decision*** and
   - **Date of Assessment***.
6. Record any notes in the **Comments** box.
7. Associate the Assessment with relevant family members by selecting the appropriate person/s in the **This review is also associated with (tick):** section.
8. Select **Save** to save a draft, or **Save Final** to lock the assessment.
9. After saving, you can attach documents to this assessment.



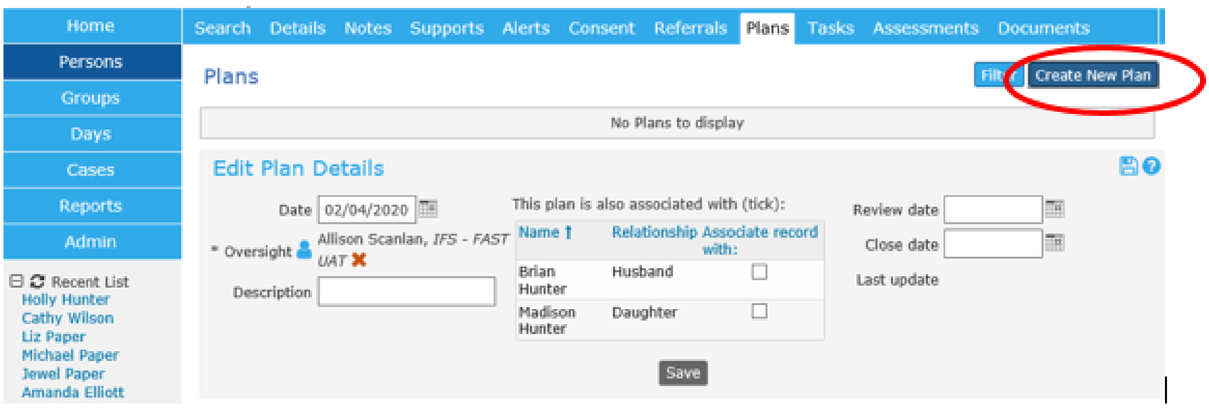
9 Plans

A Plan is a structured intervention program and the **Plans** tab enables you to create and maintain a case plan for a family.

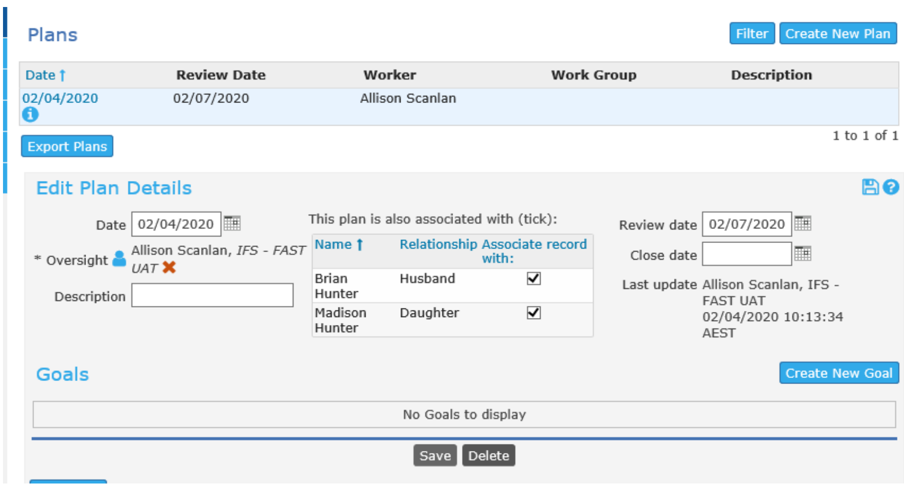
A family can have multiple plans, if this is required for the specific needs being addressed by your service. Each plan can have multiple actions enabling the identification and recording of issues, goals, actions and outcomes.

9.1 Create Plan

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

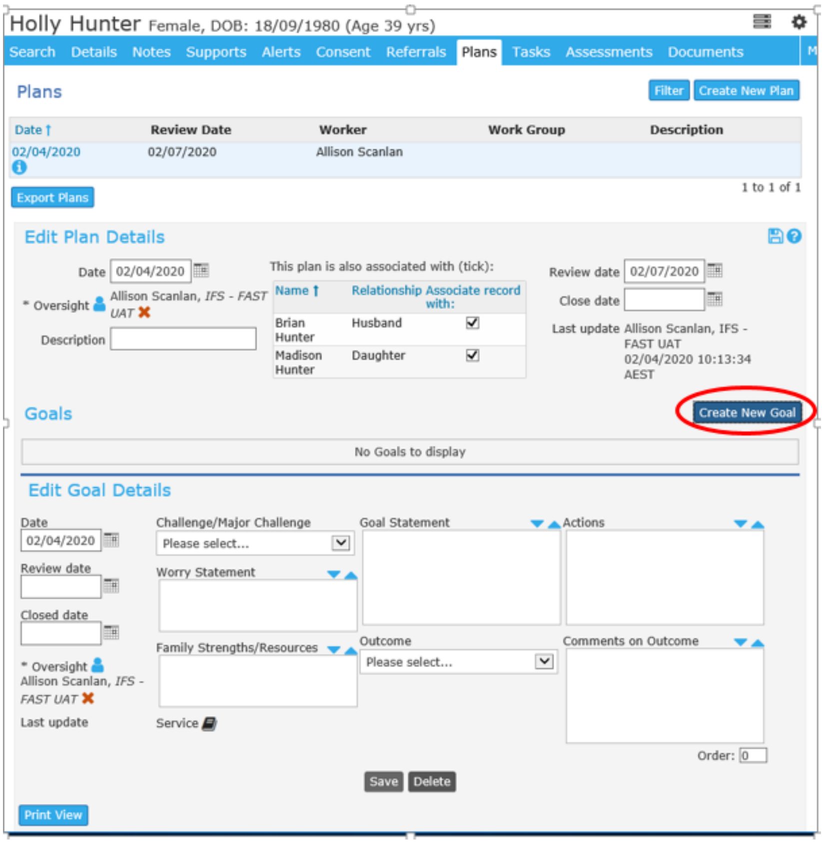


3. Enter the **Date*** and **Review date** (if required) by using the calendar icon.
4. In the **Description** field, record the name of your plan in line with the procedures of your service.
5. The **Oversight** field will default to the user entering the Plan. If additional workers are involved in 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 Goals.



9.2 Create new Goal within a Plan

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



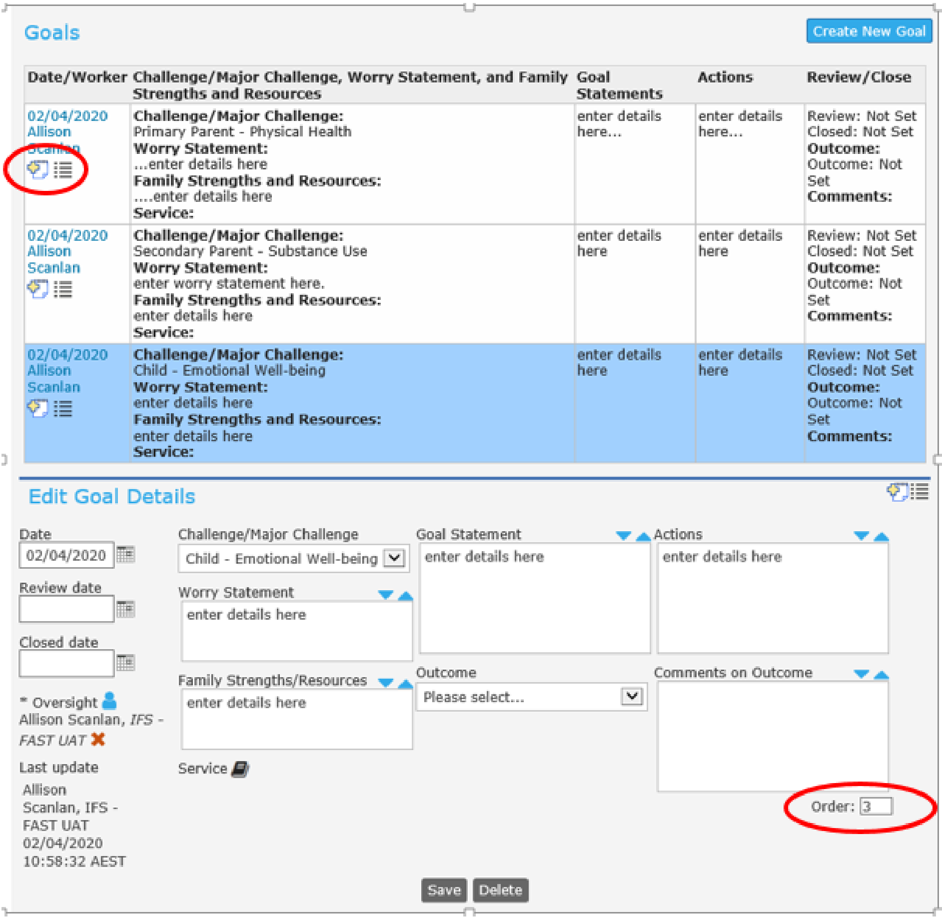
2. Enter the **Date** and **Review date** (if applicable).
3. The **Oversight** field will default to the user entering the Goal. If additional workers are involved with this Goal, select the icon to add the relevant worker/s from the drop down list. To delete workers, select the icon
4. Select the **Challenge/Major Challenge** from the list box. These will be taken from the FAST assessment.
5. Enter details for the **Worry Statement**, **Family Strengths/Resources**, **Goal Statement** and **Actions**.
6. To **Add a Service** to the Goal, select the icon. This will open the *Service Directory* where the user can search the Service Seeker database or select from the list of Favorite services to reflect the involvement of an external service with this Goal. To remove a Service from a plan, select the icon.

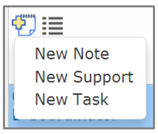
   Note: The adding of a Service is for information purposes only. The external Service does not have access to ARC.
7. To change the order in which the Goals appear in your Plan, highlight the Goal in the Plan and enter the required position in the **Order** field in the bottom right corner of the screen.
8. Select **Save**.
9. To **record a Referral** from the Goal, select the icon next to the Service (note, a Service must be added to the Goal (as outlined above) for this icon to appear). This will take the user to the Referral form within the Referrals tab. Refer Sending a referral.

10. To record another Goal, click **Create New Goal** – the details screen will display. Complete as above and **Save**.

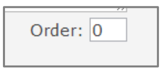
11. To print the plan, select **Print View** and print. The template includes signature blocks for your family and your service for use in accordance with the procedures of your service.

An example of a Plan with Goals is shown below:
The highlighted Goal is the one which displays in the bottom of the screen.





Within an Goal, 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. All records associated with the Goal can be viewed from the icon, simply click to display.



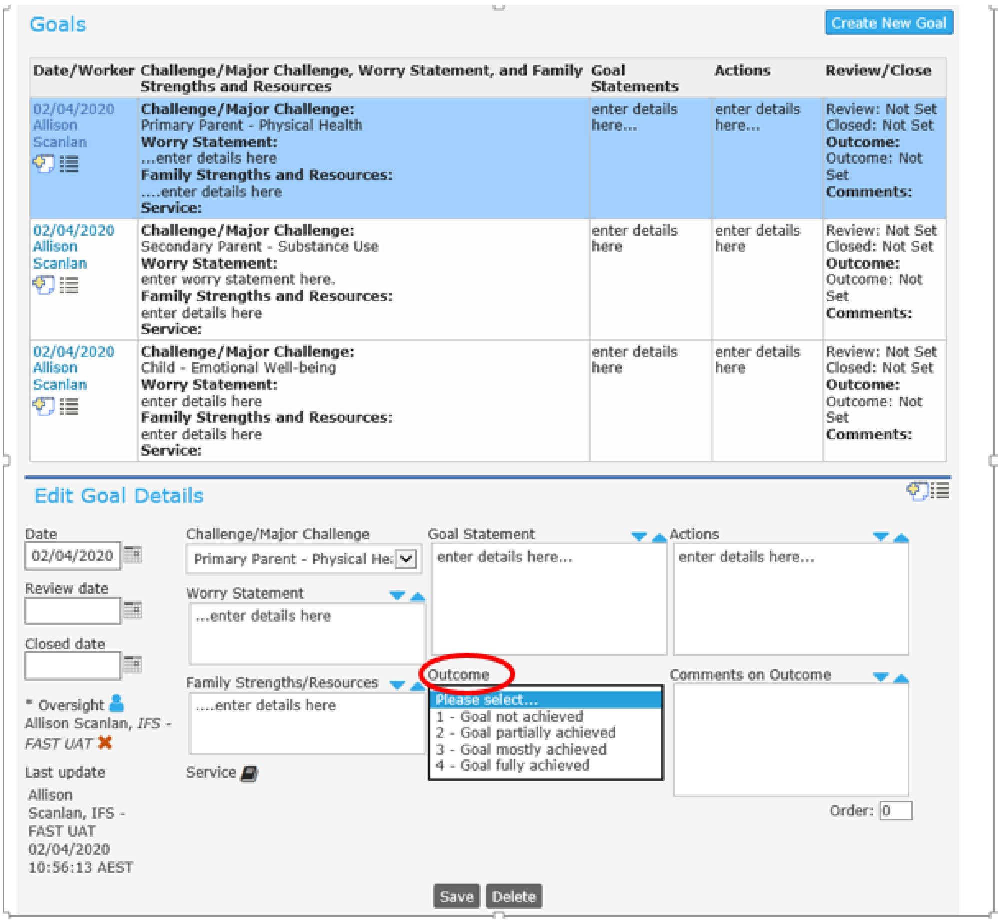
When each Goal within a Plan is created, it is numbered "0" – displayed in the bottom right of your screen. You can change the order in which your Goals are arranged in your Plan by using this box to assign the order you want for each Goal.

Additional Notes:

- 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 Goal. The Review Date will prompt a task in the worker's **My Tasks** tab.
- You can record an external worker against a Goal - this is for information purposes only as they do not have access to ARC.
- A closed goal can be viewed by clicking **View Prior**. This is required if you wish to print all Goals associated with a plan.

9.3 Close a Goal 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 Goal against the plan to open the **Edit Goal Details** form.
4. Indicate the **Outcome** achieved based on the drop down box (1 – goal not achieved; 2 – goal partially achieved; 3 – goal mostly achieved; 4 goal fully achieved)

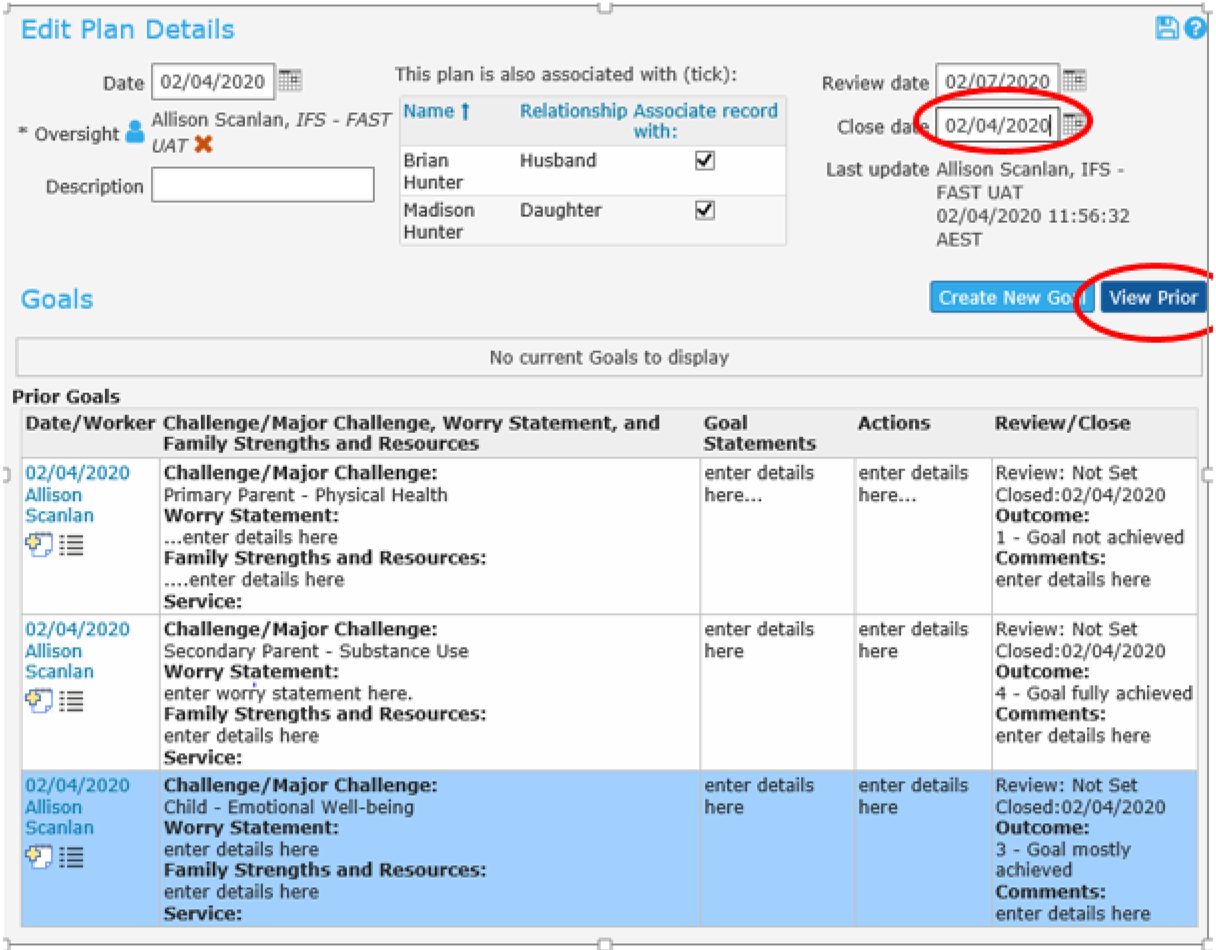


5. Record notes in the **Comments on Outcome** box provided.
6. Enter a **Closed date** and select **Save** (update any comments as applicable).

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



9.5 Delete a Goal within a Plan

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

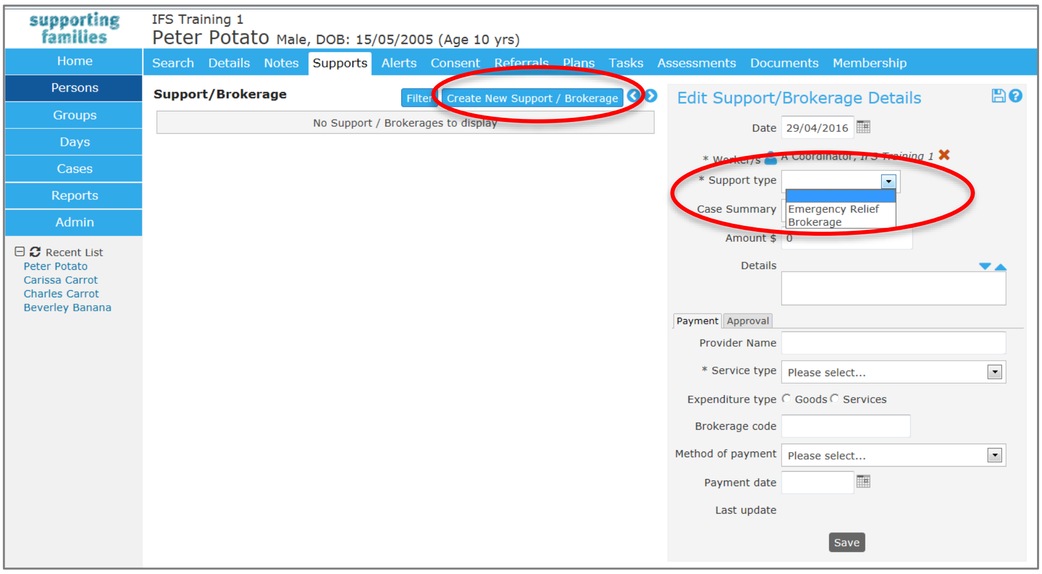
Note: This action is irreversible therefore should be completed with caution.

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 Goal against the plan to open the **Edit Goal Details** form.
4. Select **Delete**. The Goal will now be deleted.

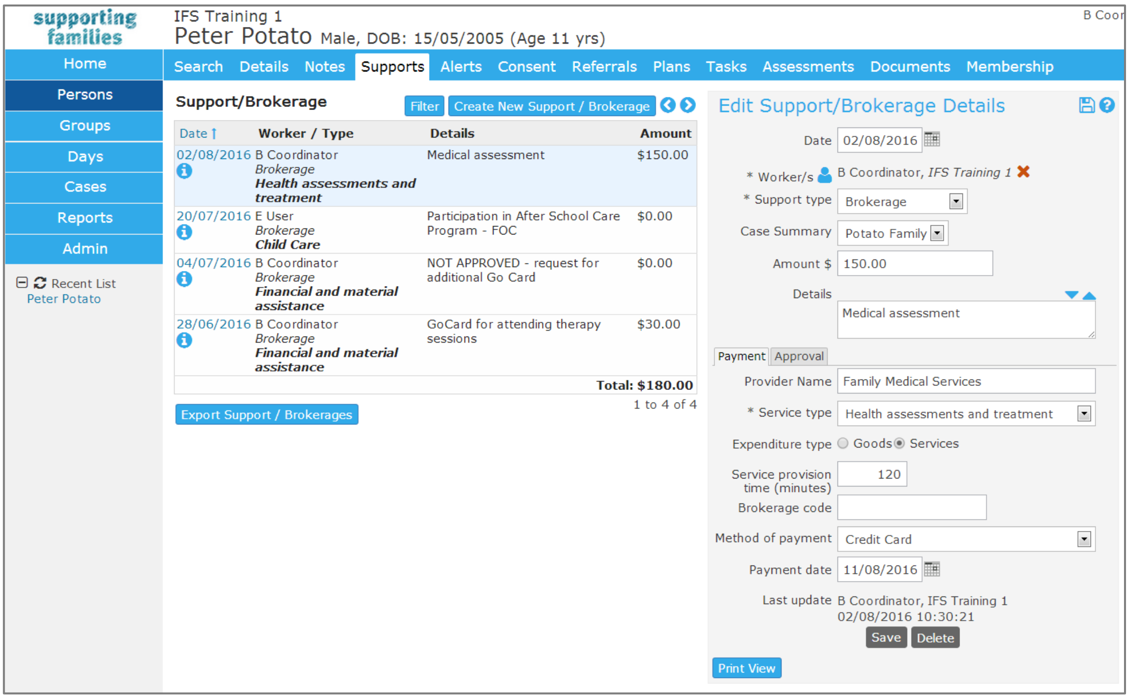
10 Support / Brokerage

10.1 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.



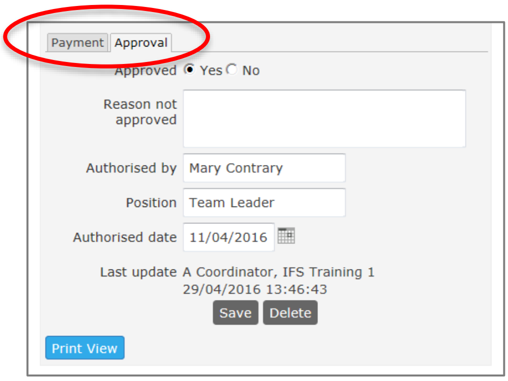
Additional Notes:

- 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)

10.2 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.



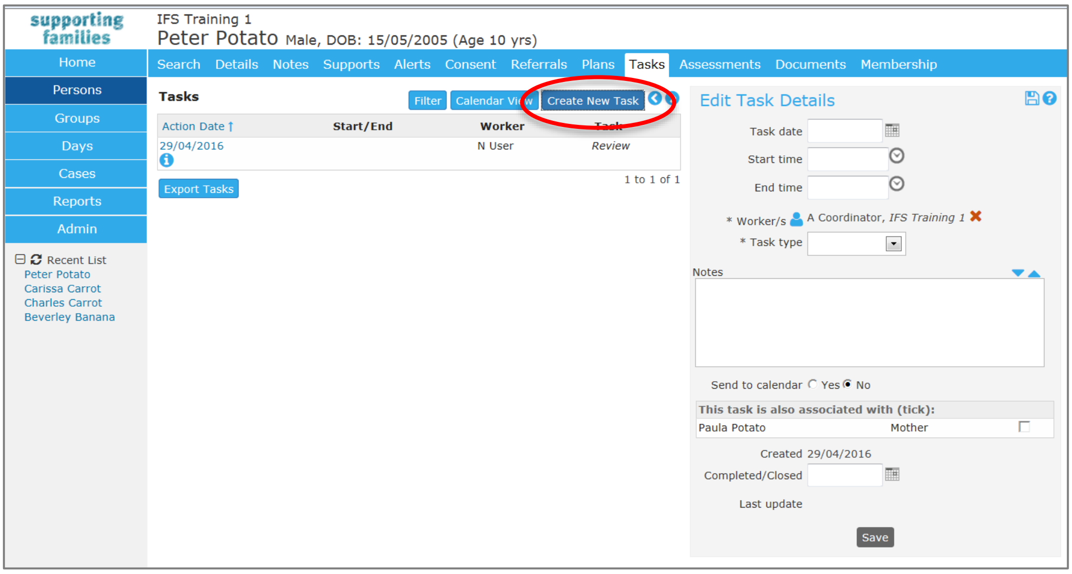
4. Enter **Approval** (Yes or No), if No is selected enter a **Reason not approved.**
5. Enter the **Authorised by**, **Position** and **Authorised Date** *
6. Select **Save**.

11 Tasks & Alerts

11.1 Create a Task

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

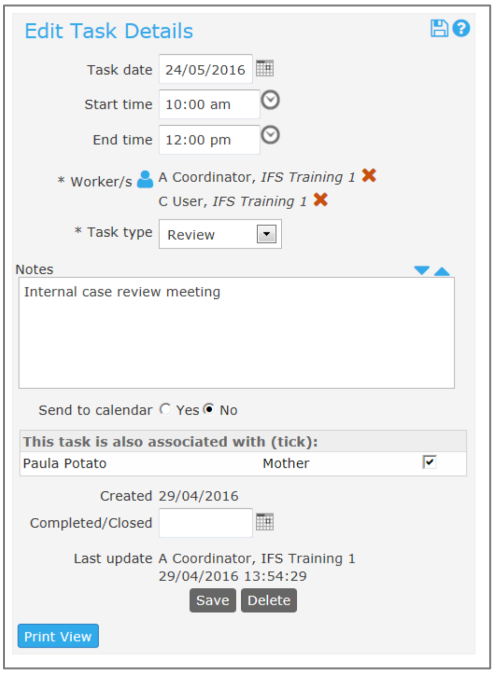
1. On the **Persons** page, select the **Tasks** tab.
2. Click **Create New Task**.



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

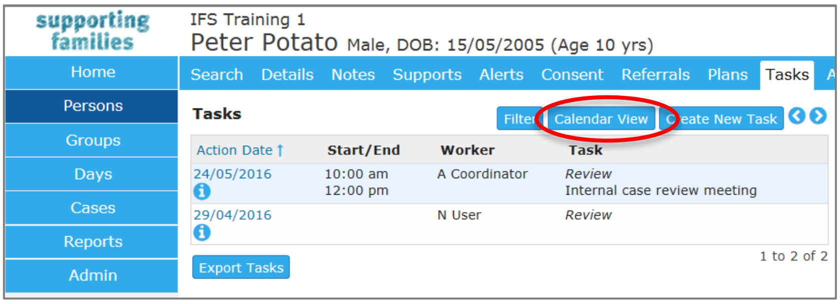
NOTE: When the Task has been completed, the Completed**/Closed** date field must be recorded – if not, the Task will continue to display on the **My Actions** and **Team Actions** tabs on the Home page.

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

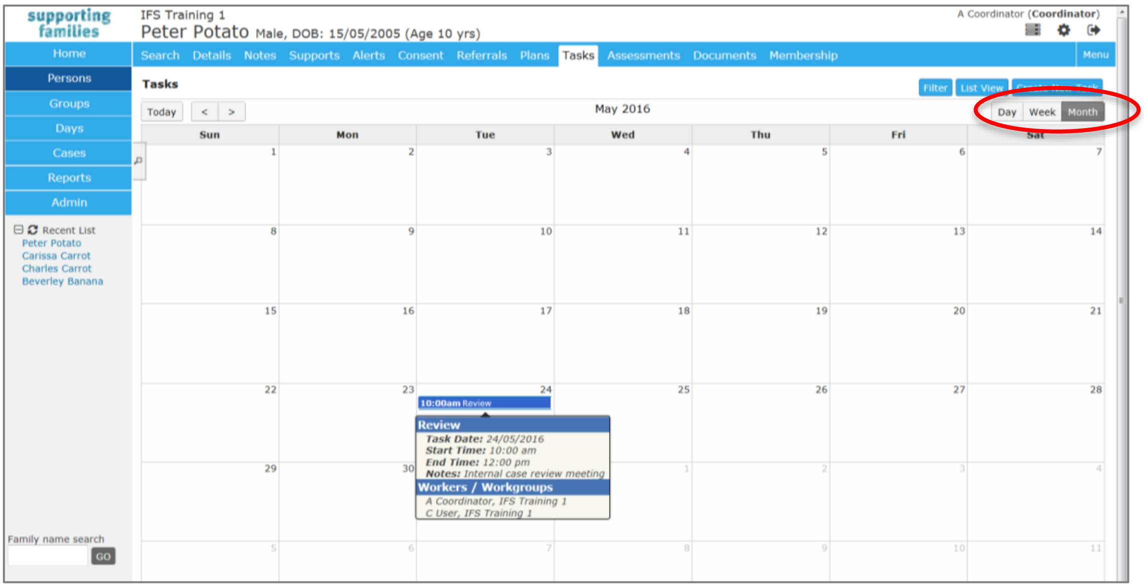


Tasks can also be created and viewed in a Calendar View which gives users a visual representation of scheduled tasks by Day, Week or Monthly views.

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

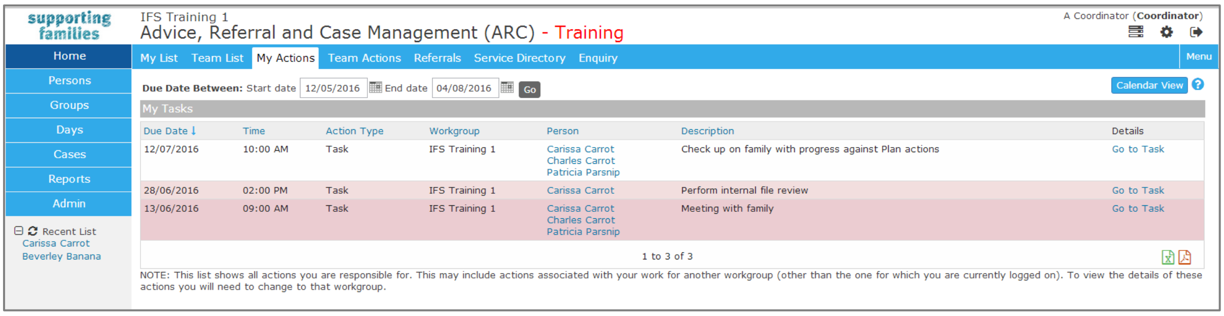


10. A schedule of tasks can be viewed by selecting the Day, Week or Month buttons (highlighted below).



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

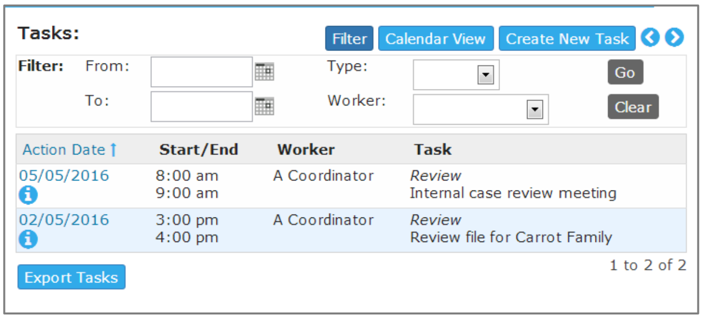
Overdue Tasks are highlighted in pink – as below.



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.

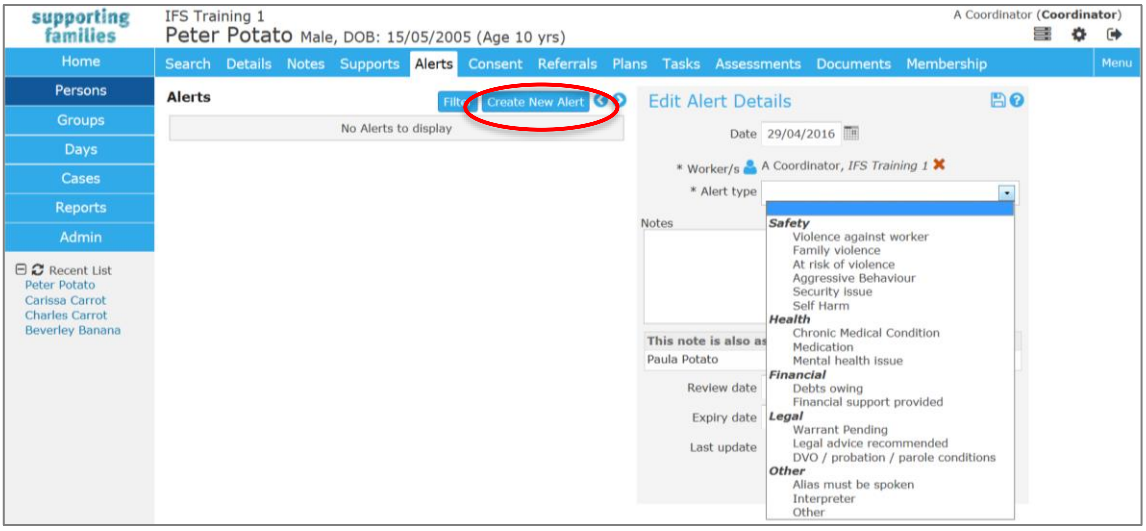


- A user with a Coordinator access level is able to delete a task record.
- If *Send to calendar* has been selected, a message will be displayed at the top of the Edit Task Details form: either a confirmation that the invitation was sent or an error message that the calendar invitation was not able to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

11.2 Create an Alert

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

1. From the **Persons** Page, select the **Alerts** tab.
2. Click **Create New Alert** – the Edit Alert Details form will open on the right-hand side.
3. Enter **Date**. This can be backdated.
4. 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.
5. Select the **Alert type.**



6. Enter details about the Alert in the **Notes** box.
7. Tick the checkbox against related Persons, as relevant, to have the Alert also display on their record.
8. Enter a **Review date** (the task will appear in the **My Actions** / **Team Actions** tabs on the **Home** page).
9. 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 Person record and then open it again).
   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.

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

Additional Notes:

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

12 Managing Referrals

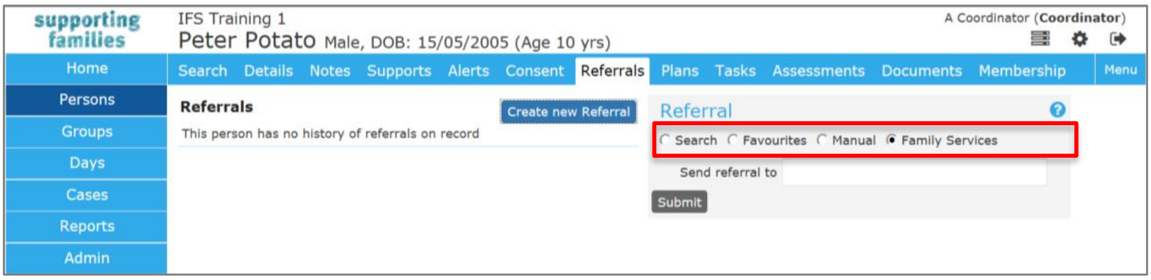
This section outlines the important functionality for:

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

12.1 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.



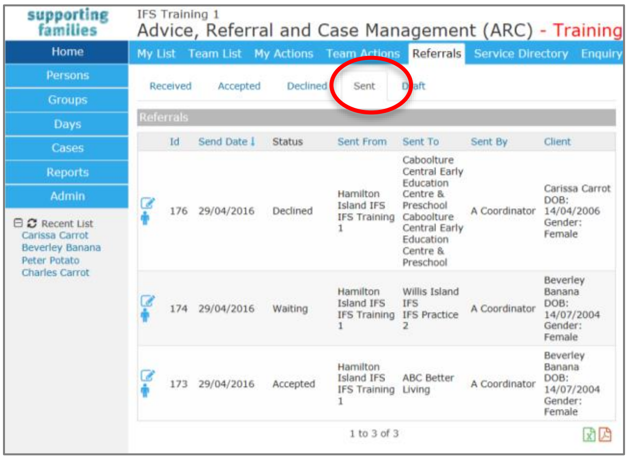
There are **three** options for making a referral to another service - these are:

- **Send a Referral to another service within ARC - Family Services**: This **sends** a referral to another service provider using ARC. The referral form is set to this option as the default.
- **Record a Referral - Manual**: This **records** referrals to external providers - services not using ARC 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.
- **Record a Referral to a service listed in the Service Seeker Database - Search:** This **records** a referral to a service listed in the Service Seeker database.

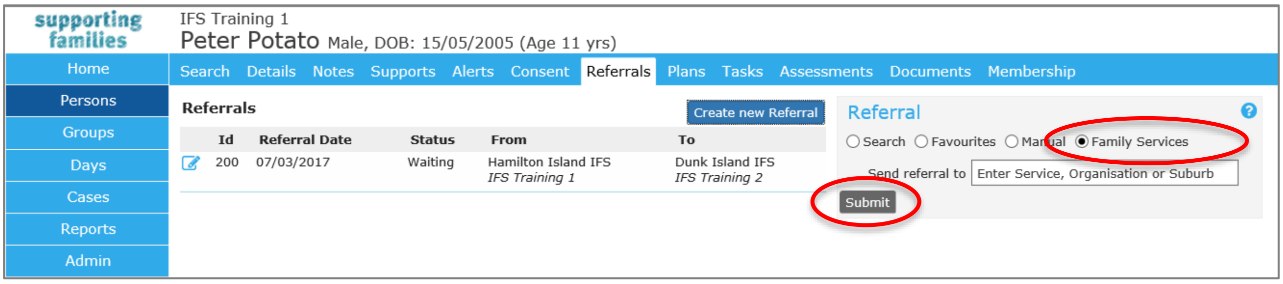
  IMPORTANT NOTE: The actual notification and documentation for the referral must be sent via channels external to ARC.

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

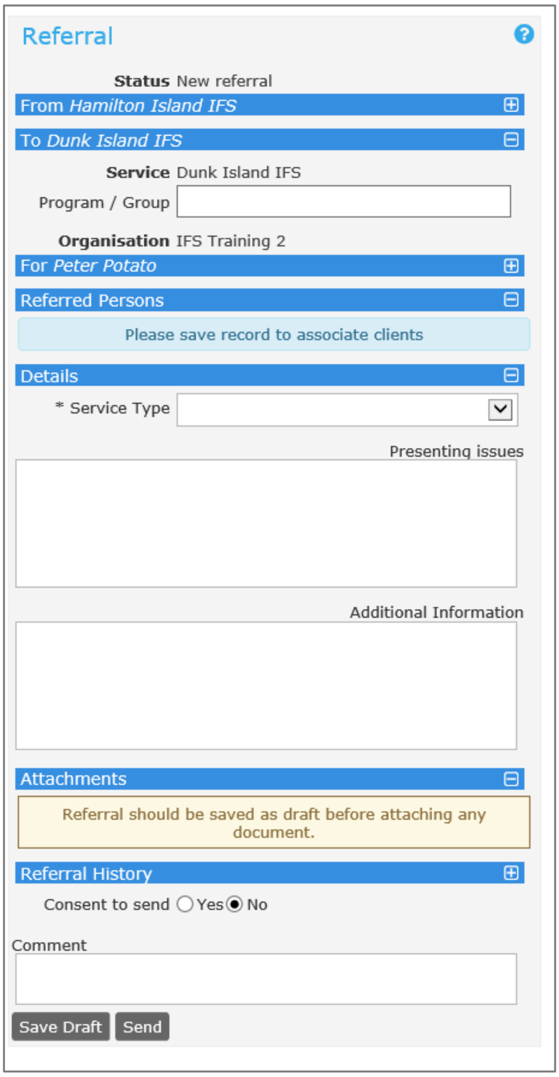


12.1.1 Send a Referral to another service within ARC - Family Services

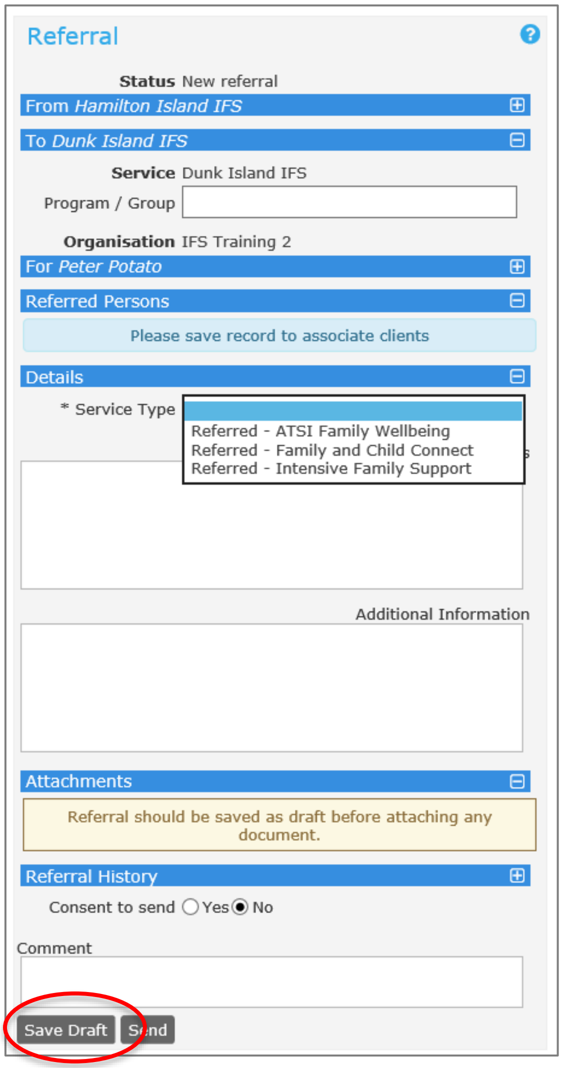
1. On the **Persons** page, Referrals tab, click **Create new Referral**.
2. You will notice the Referral type of **Family Services** is already selected**.**
3. Enter *FaCC* or *IFS*, to bring up the list of services within ARC.
4. Select the required service from the dropdown list which appears
5.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



The Referral form appears.

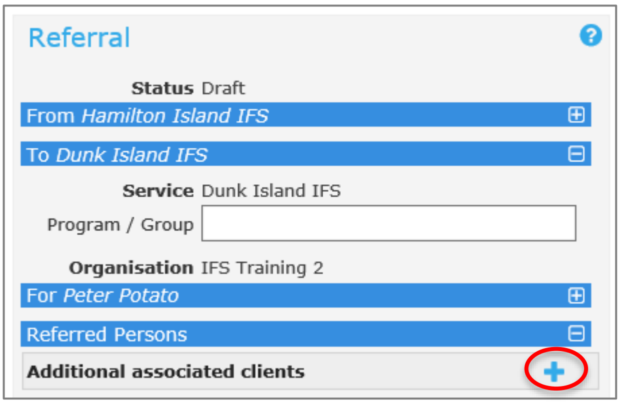


6. Select **Service Type** *, then click **Save Draft**.
Service Type is required for departmental reporting. The Referral will not save if this field has not been completed.

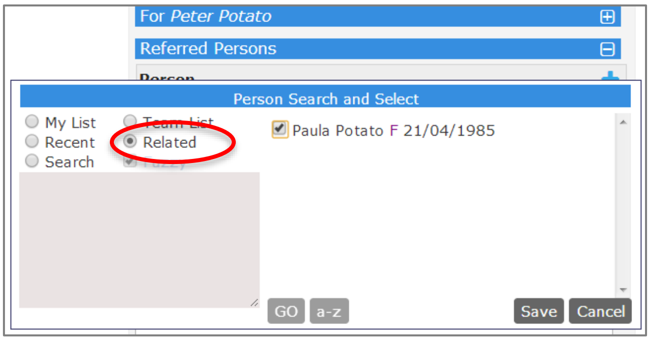


7. The **Referred Persons** section is populated with the primary Person record.

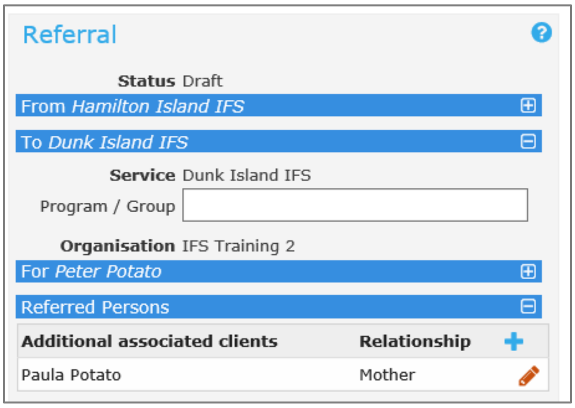
Click on the  icon to attach the other Persons in the Case (to the referral).



8. 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 linked to the Referral.

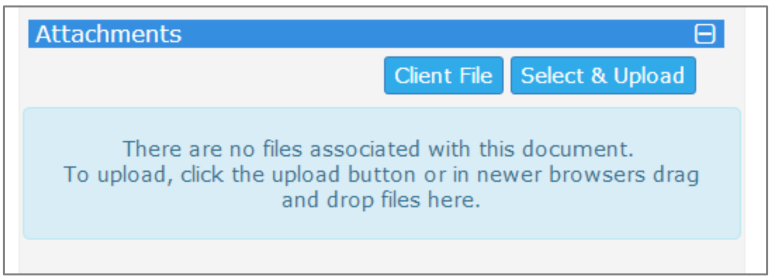


9. Enter in **Presenting Issues** and **Additional Information** if required.

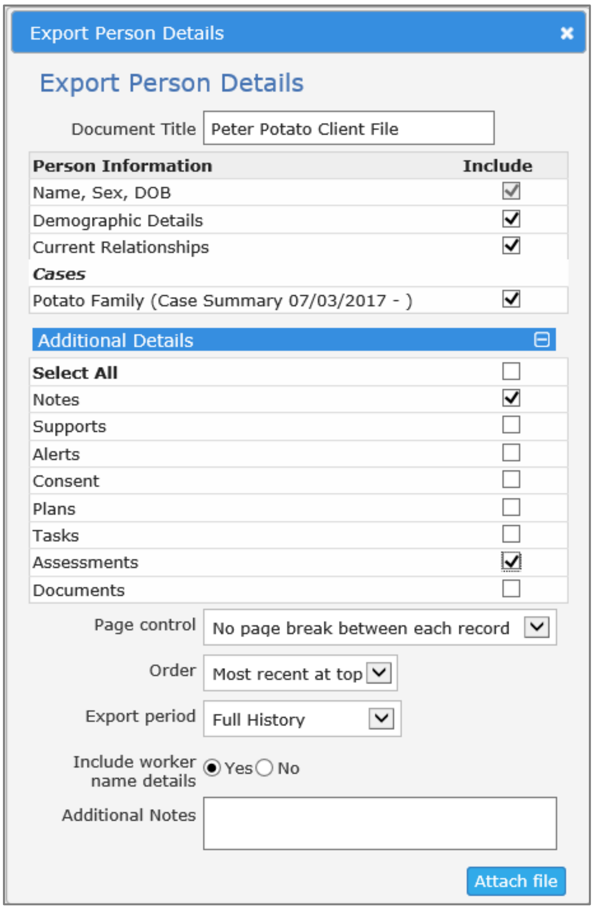
10. Enter any **Comments** and click **Save Draft.**

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.

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

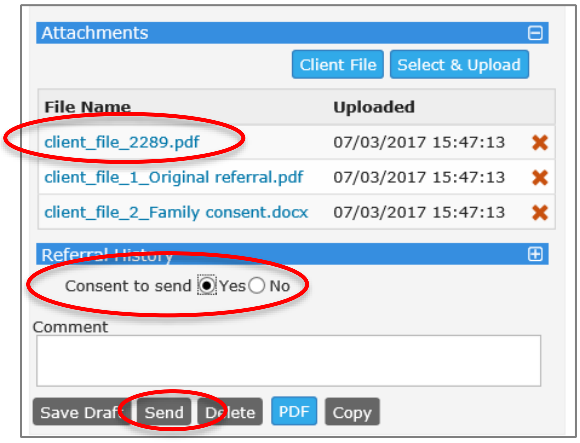


12. Select **Client File** then select the information you wish to attach to the referral. The Case Summary information is a mandatory inclusion. Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes**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



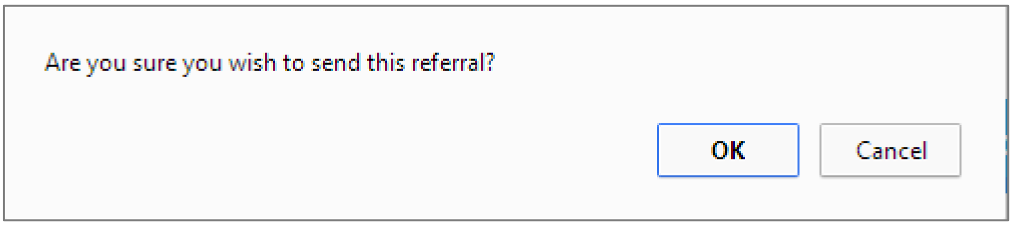
13. Check **Consent to send*** has been provided.

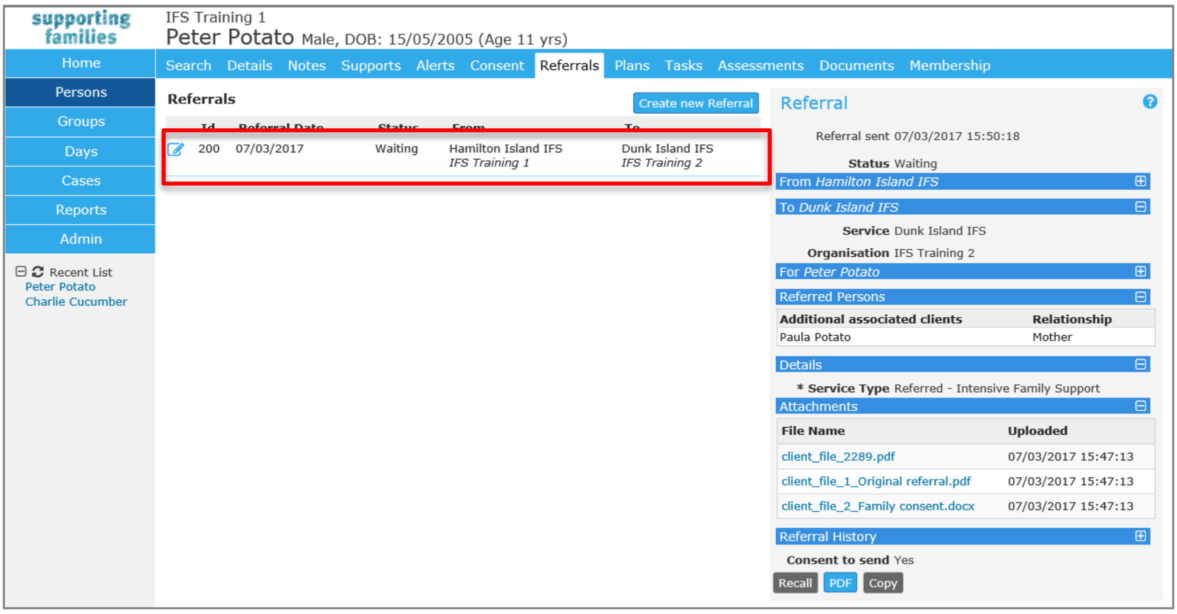
Changes introduced with the *Child Protection Reform Amendment Act 2017* in late 2018 included broader considerations for sharing information.

The Business Program Team gave specific consideration to the functionality in ARC requiring a "Yes" for **Consent to send** in order to send a referral. To promote due consideration in practice for handling clients, the business decision was made to retain the existing features in ARC.

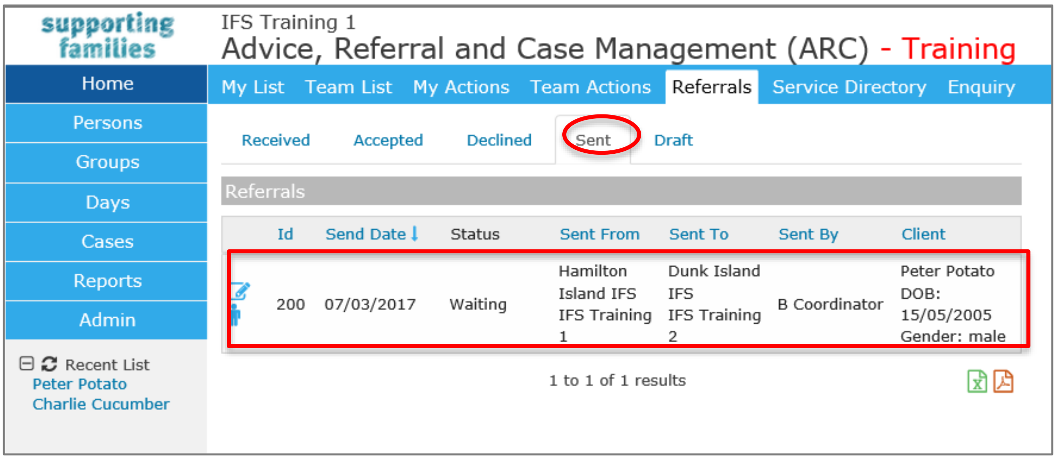
Where consent has not been obtained from the client, a note to this effect and why the referral is being sent should be included in the *Comments* section at the bottom of the referral.

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





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



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

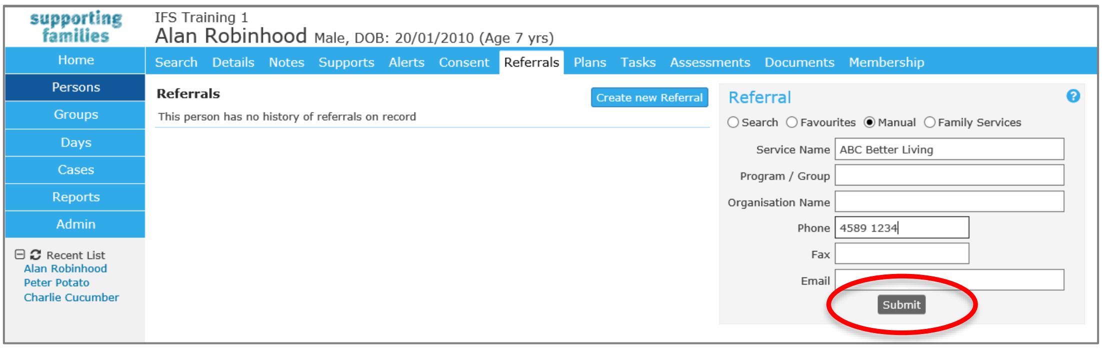
16. If the Referral needs to be recalled, open the Referral by clicking the blue pencil icon and click the **Recall** button in the bottom left of the form. This will only function while the Status is *Waiting*.

12.1.2 Record a Manual Referral

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

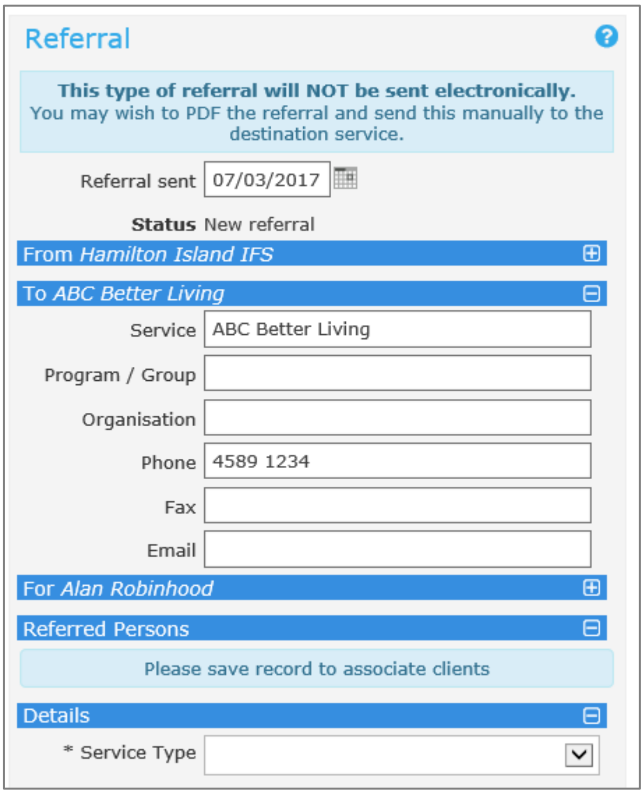
IMPORTANT NOTE: Notification of the referral and associated documents **must be sent separately via channels (eg. email, post) external to ARC.**

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.**



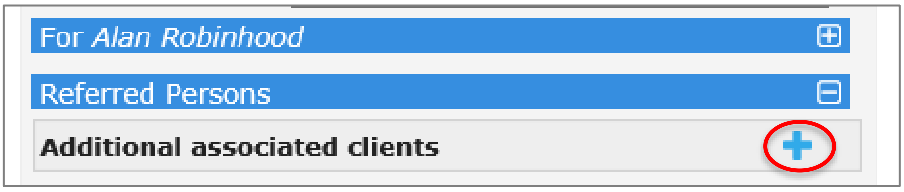
The Referral form will appear.

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.



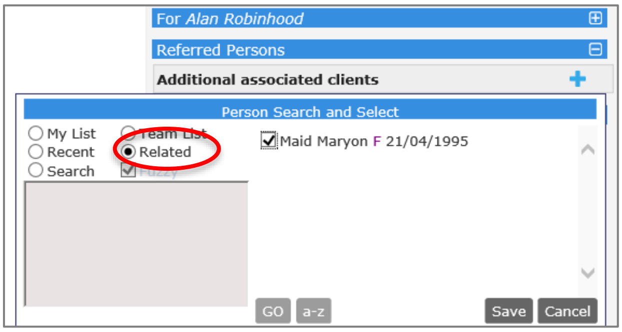
5. Select **Service Type***, then click **Save Draft**.
A validation message will appear if you attempt to save the Referral without selecting the relevant **Service Type**. **Service Type** is required for departmental reporting

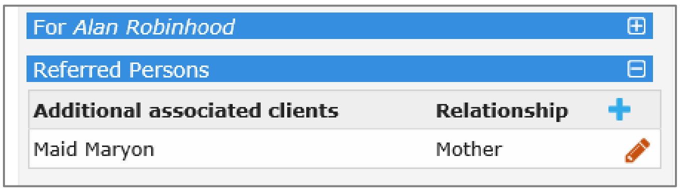
6. The **Referred Persons** section is now populated with the primary Person record.



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

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.



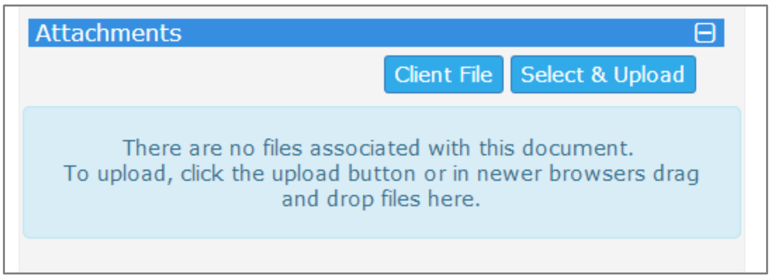


8. Enter in **Presenting Issues** and **Additional Information** if required.

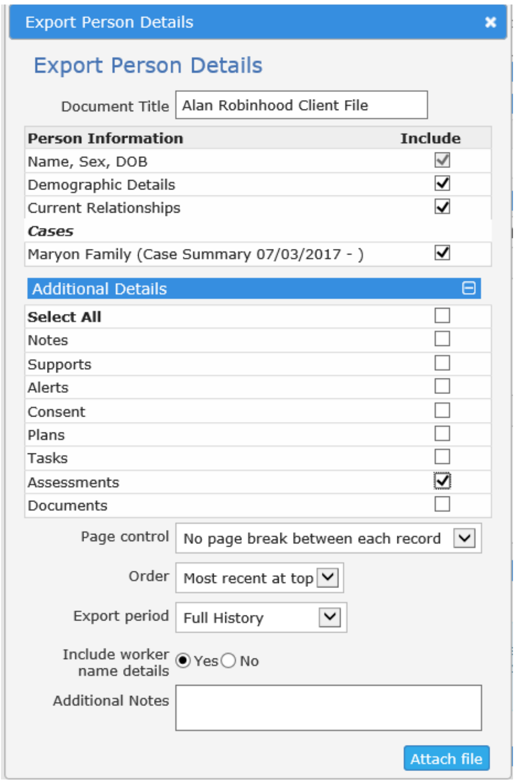
9. Enter any **Comments** and select **Save Draft.**

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)

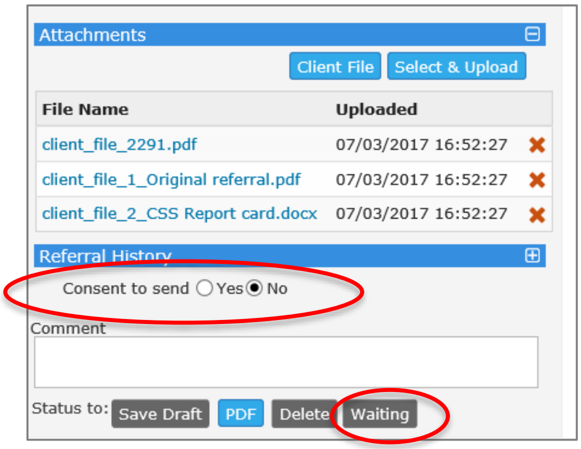


11. Select **Client File** then select the information you wish to attach to the referral. The Case Summary information is a mandatory inclusion. Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes**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

Changes introduced with the *Child Protection Reform Amendment Act 2017* in late 2018 included broader considerations for sharing information.

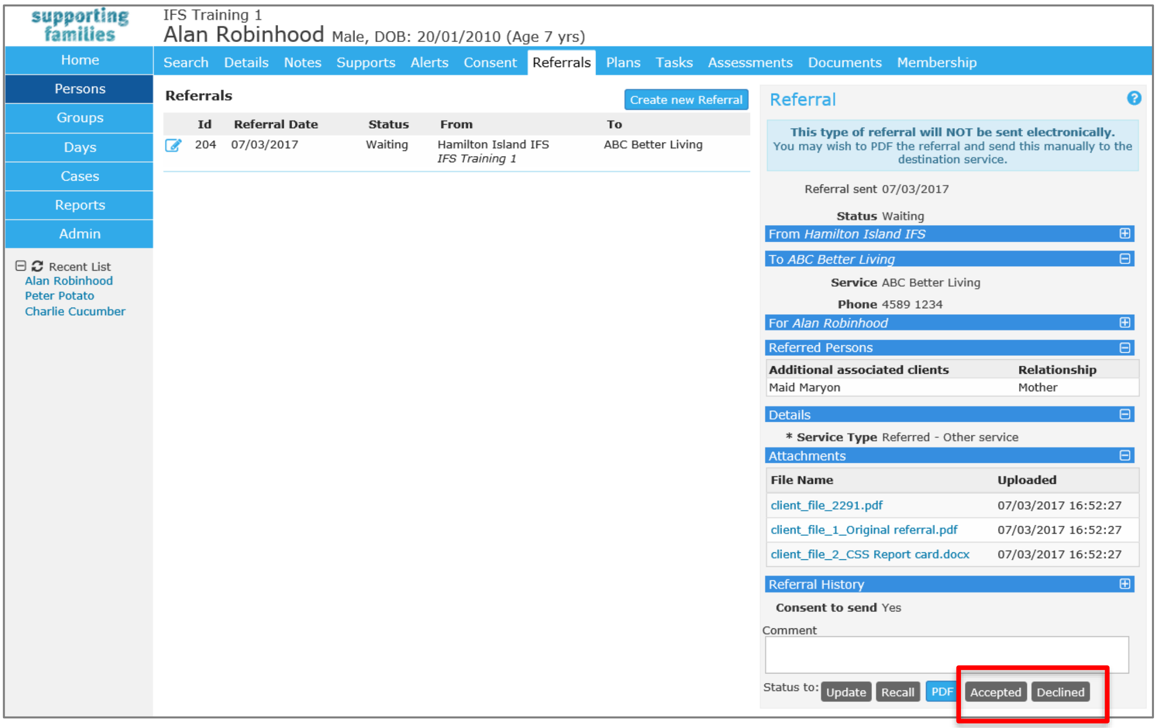
The Business Program Team gave specific consideration to the functionality in ARC requiring a "Yes" for **Consent to send** in order to send a referral. To promote due consideration in practice for handling clients, the business decision was made to retain the existing features in ARC.

Where consent has not been obtained from the client, a note to this effect and why the referral is being sent should be included in the *Comments* section at the bottom of the referral.

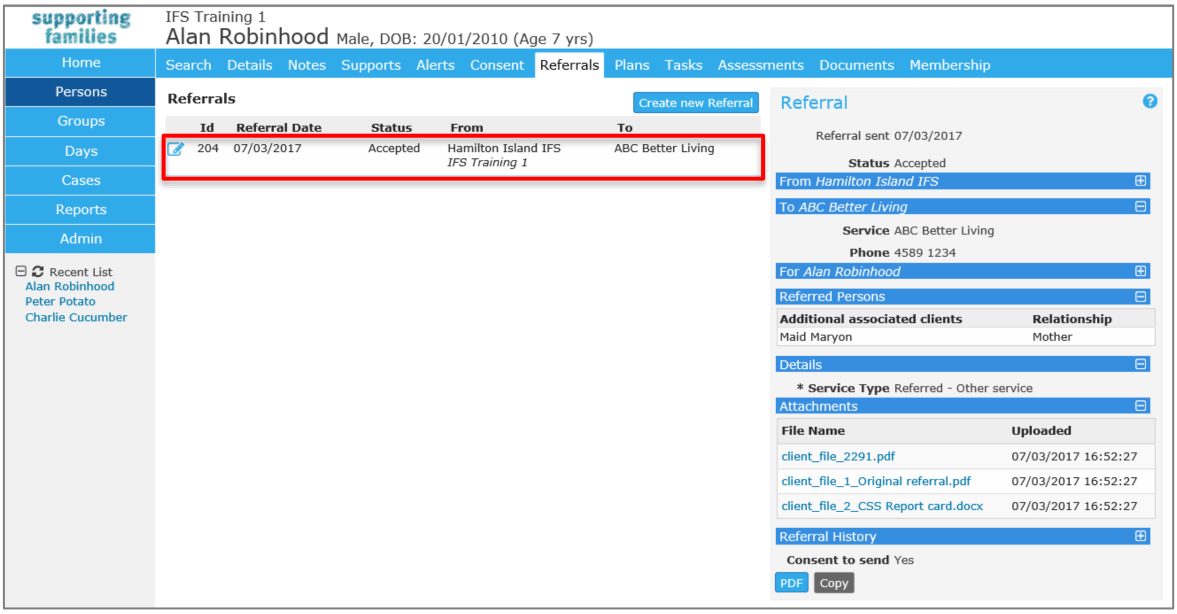
13. Click **Waiting.**

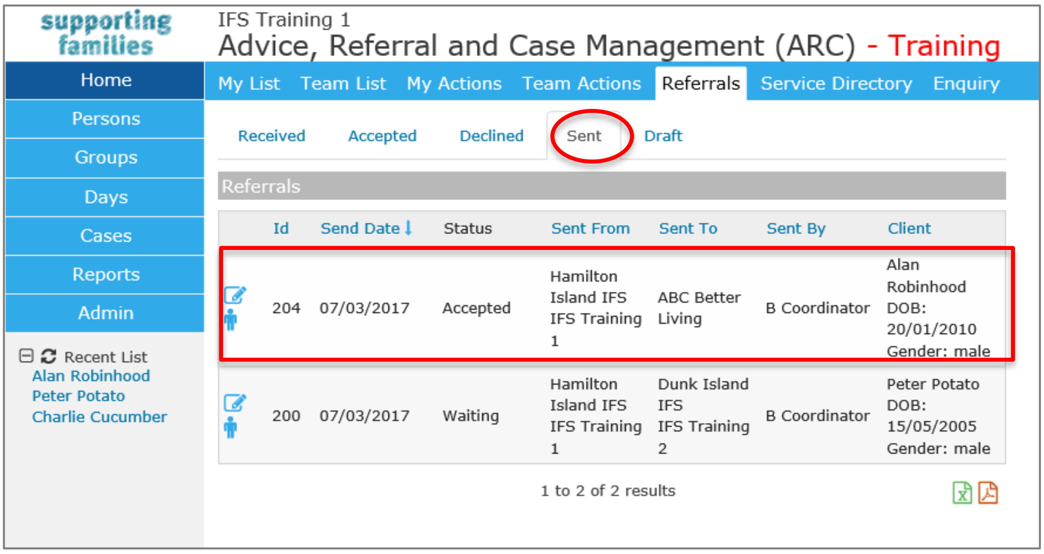
Note: A **PDF** copy of the referral **must** be generated and either emailed or printed/faxed to the receiving service.

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



The Sent referral will show on the **Person** page, **Referral** tab (as below) <u>for every Peron attached to the referral</u> AND on the **Home** Page, **Referrals** tab, **Sent** sub-tab.



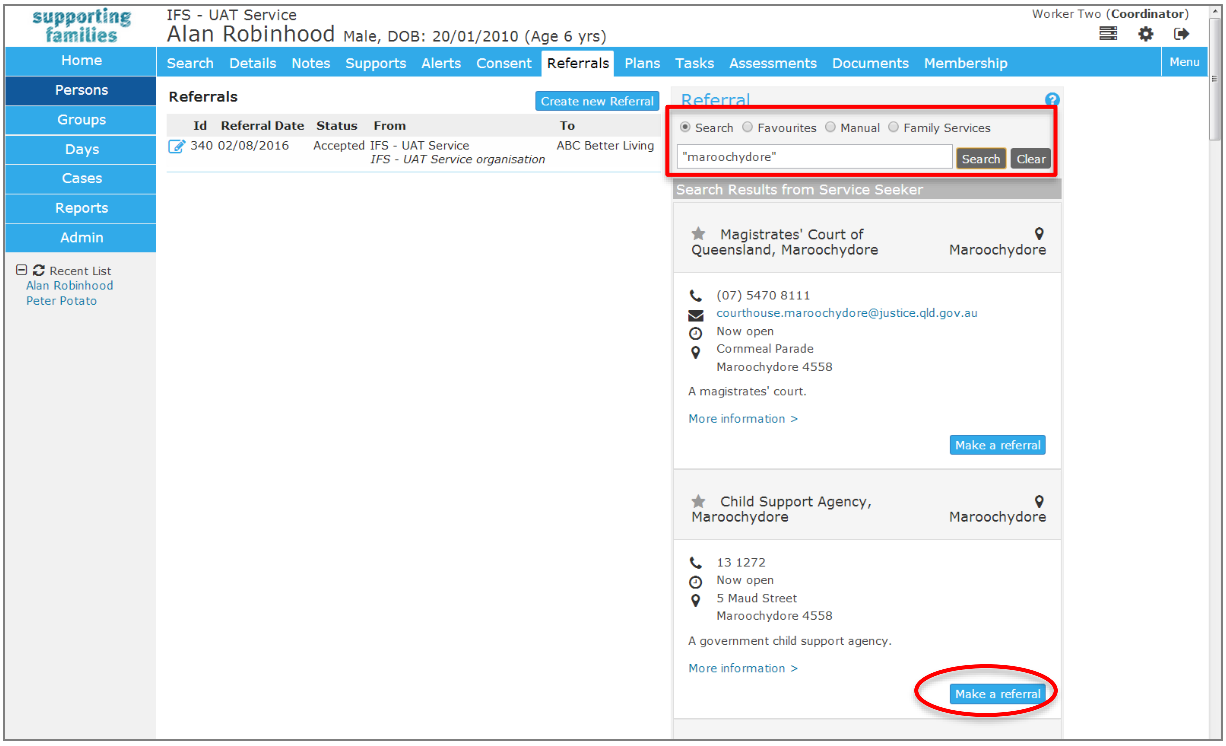


12.1.3 Record a Referral to a service listed in the Service Seeker database

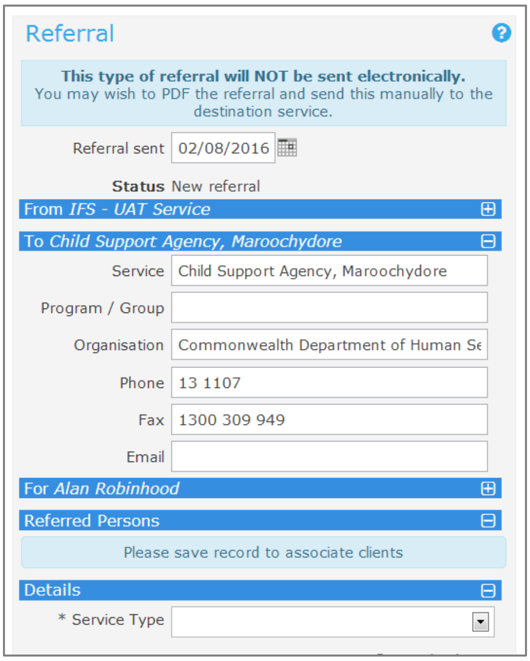
__IMPORTANT NOTE__: The actual notification and documentation **must be sent separately via channels (eg. email, post) external to ARC.**

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.



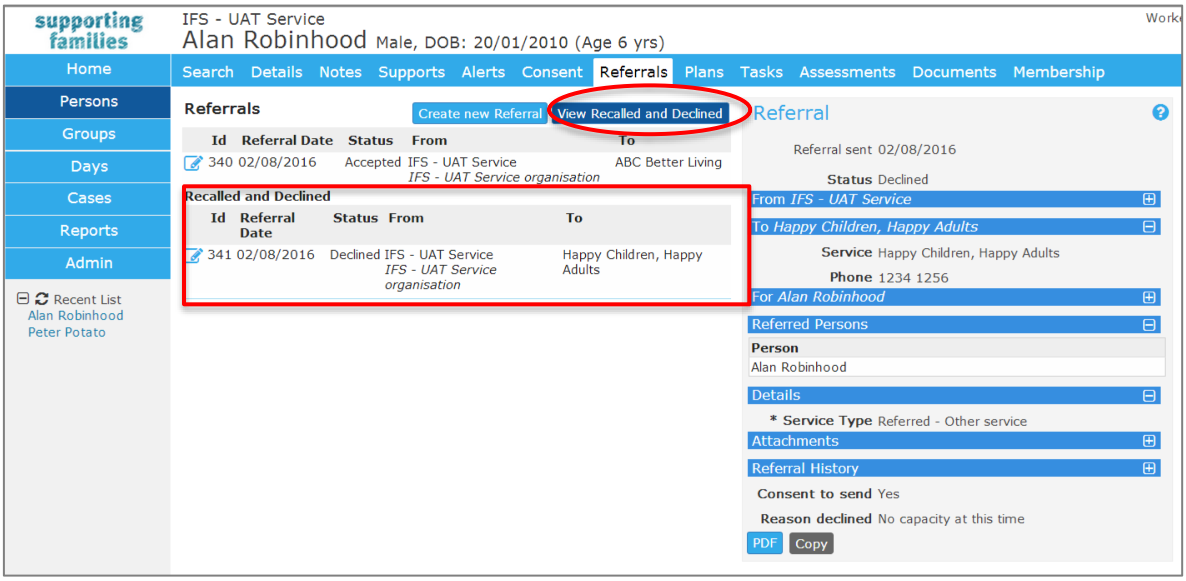
4. Complete by following steps 5 – 15 as detailed for **Record a Manual Referral** in the preceding section.

12.1.4 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.

<u>NOTE:</u> 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.

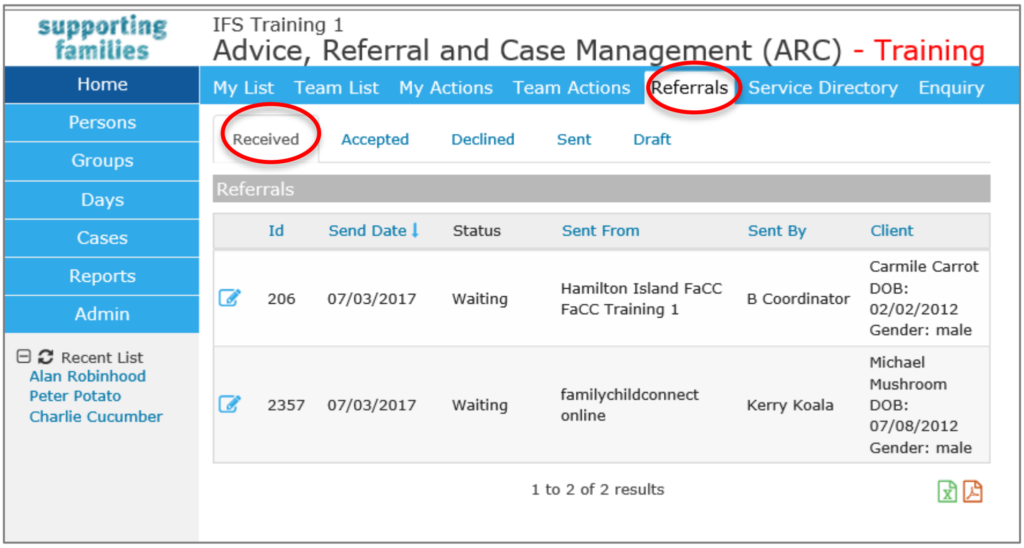


12.2 Receiving Referrals

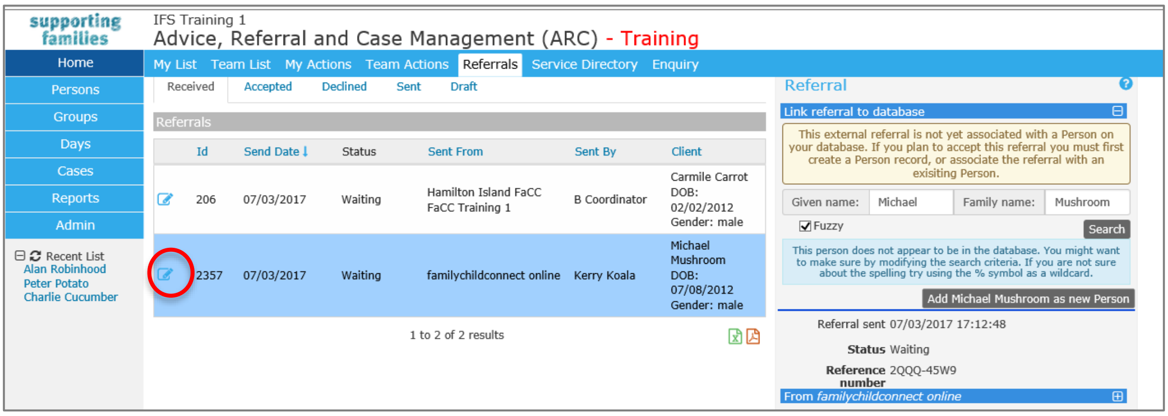
Referrals received from another service using ARC or submitted by members of the public, professionals or Child Safety using *familysupportreferral* online referral form, will show in the **Referrals** tab, on the **Home** page.

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.

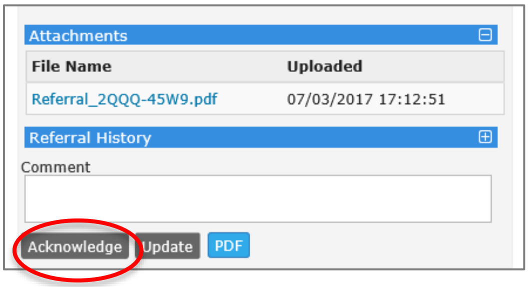
1. On the **Home** page, select **Referrals** tab.



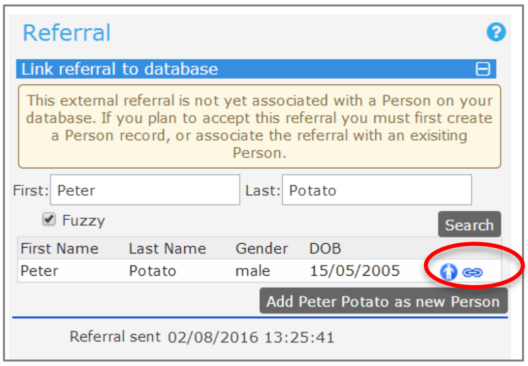
2. In the **Received** sub-tab, select the icon to open the referral form.



3. Click **Acknowledge**.



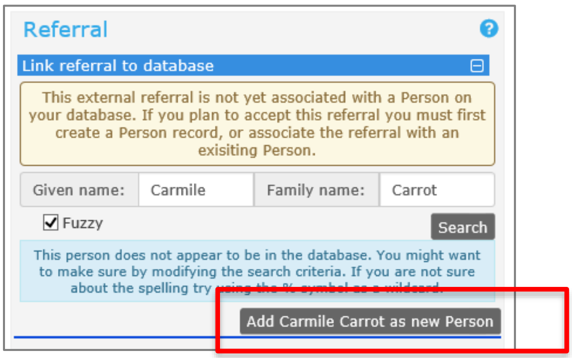
4. ARC automatically searches your workgroup and identifies if the referred client/s have an existing Person record in your workgroup.



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.

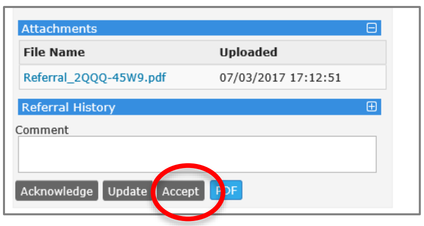
Where it is for the same Person (an exact match), click the blue link icon.

5. If the referral is for a new client, select Add **< Name> as a new Person**.



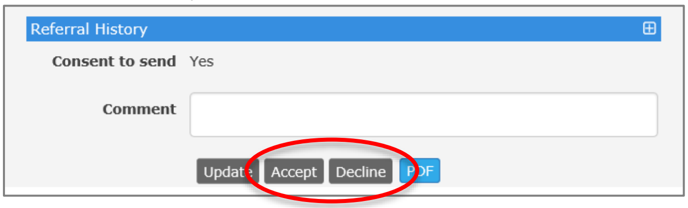
The procedures developed by your service may involve review of the **client file** in determining whether to accept or decline the referral.

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



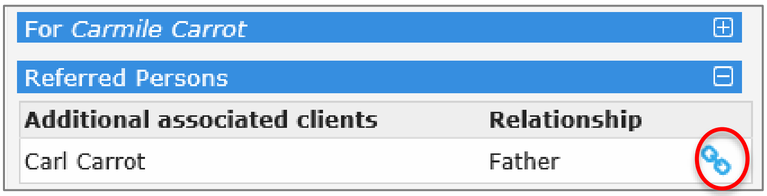
Referrals from *familychildconnect online* are not able to be declined, as there is no automated mechanism to advise the referrer of this decision. You need to **Accept** the referral in ARC and contact the referrer to advise them of the required action.
Should the referral be outside your catchment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

For referrals received from another service in ARC, this allows you to **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.

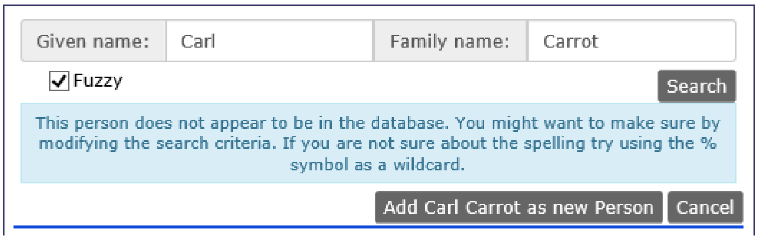


Note: When you respond to a *Family Services* referral, your response will update the **Status** of the referral in your workgroup and in the sending workgroup.

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.

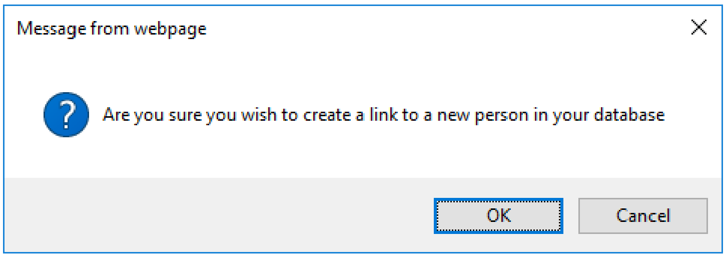


The following message will appear:

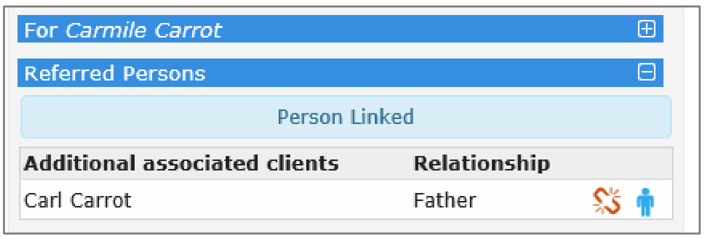


This gives you the option to search for the person, or click on **Add…as new Person**.

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:



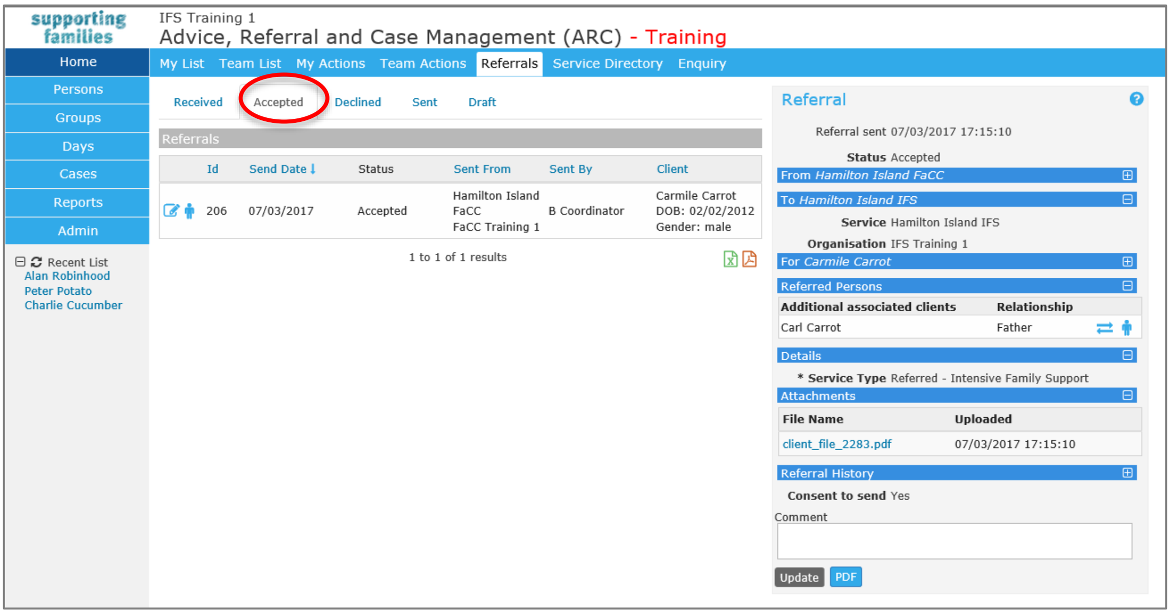
IMPORTANT NOTE: In this example, a Person record for Carl Carrot will now exist in your workgroup.

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

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**.

NOTE: 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 – for Carmile and Carl.

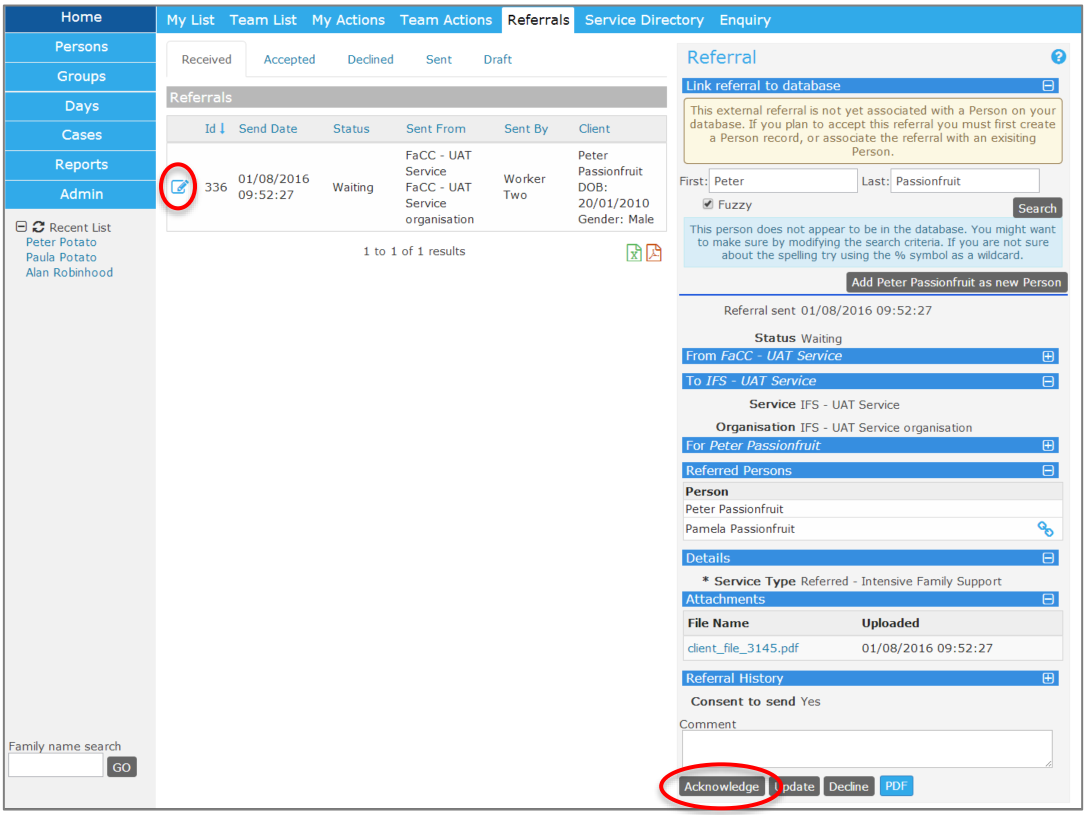
Additional Notes:

- **For Coordinators**: Basic reporting is available for referrals sent and received by your service / workgroup – refer section Reporting – Referrals tab.

12.2.1 To decline a Referral

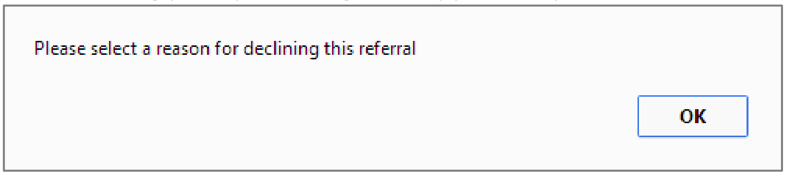
The specific procedures will be as defined by your service.

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

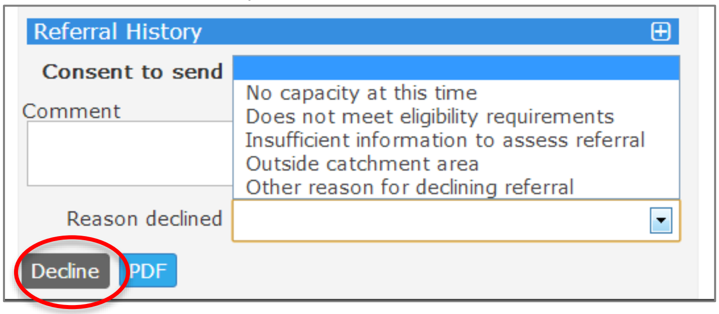


2. Click **Acknowledge** to advise the sending service you are considering the referral.

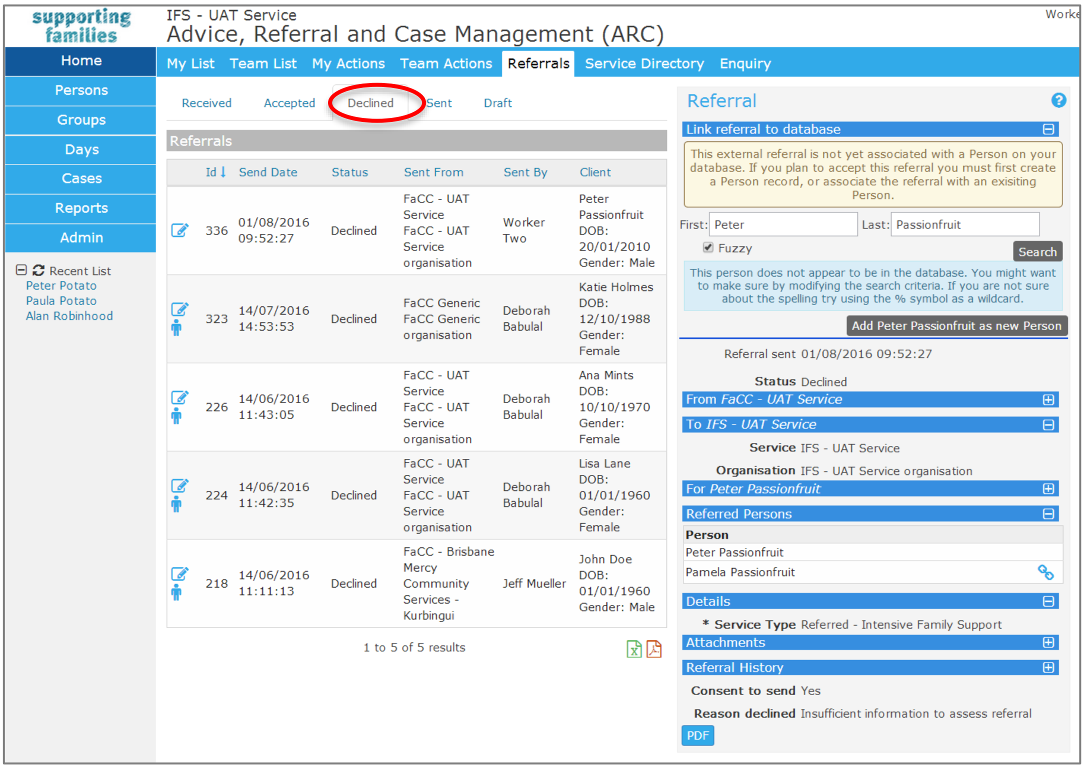
3. When decision has been made to decline the referral, click **Decline**.
The following prompt message will appear on your screen. Click **OK**.



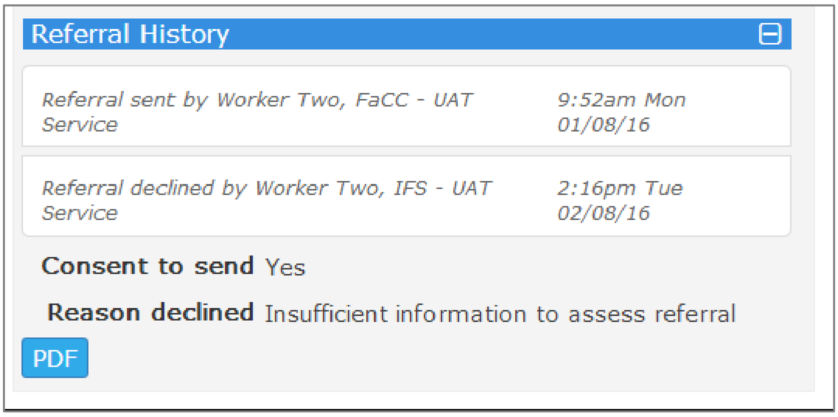
4. Select **Reason declined** from drop-down values, then click **Decline**.



5. 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.



13 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.

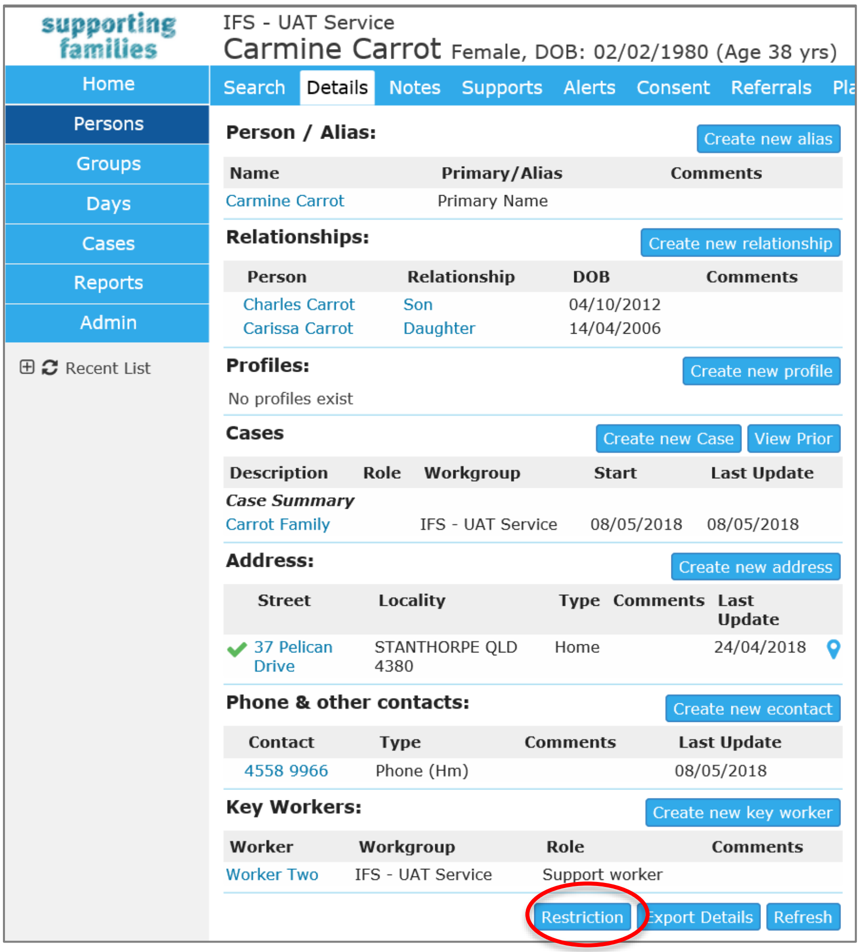
This section outlines the functionality that has been developed by Infoxchange to enable this.

13.1 Apply Restricted Access

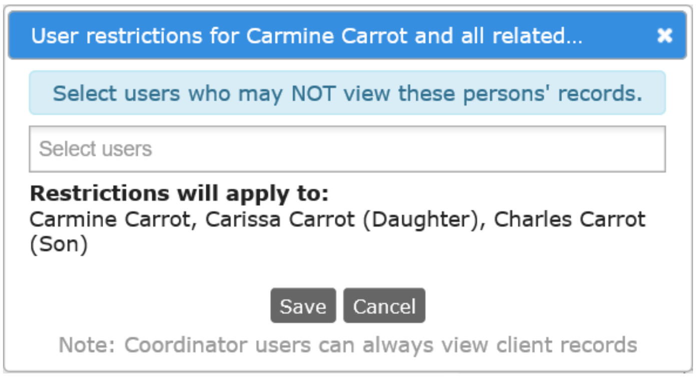
Access to Person records can only be restricted for NORMAL users i.e. Coordinators can access all records within your workgroup.

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

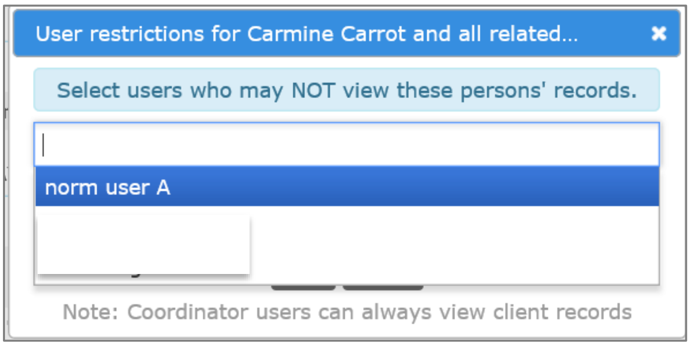
1. Open **Person** Page and display **Details** tab for the Person record requiring access to be restricted.
   Click the **Restriction** button at the bottom.

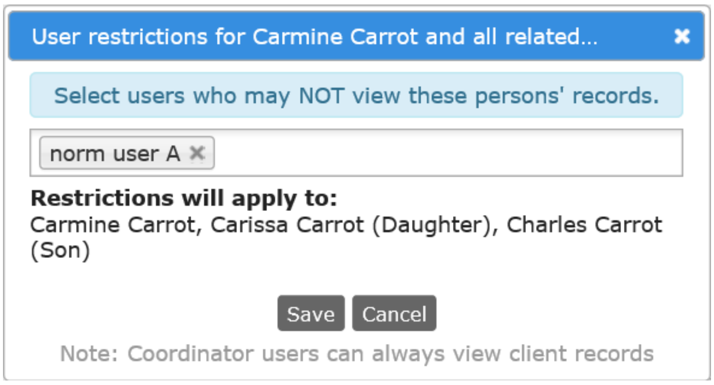


2. The following screen will appear :



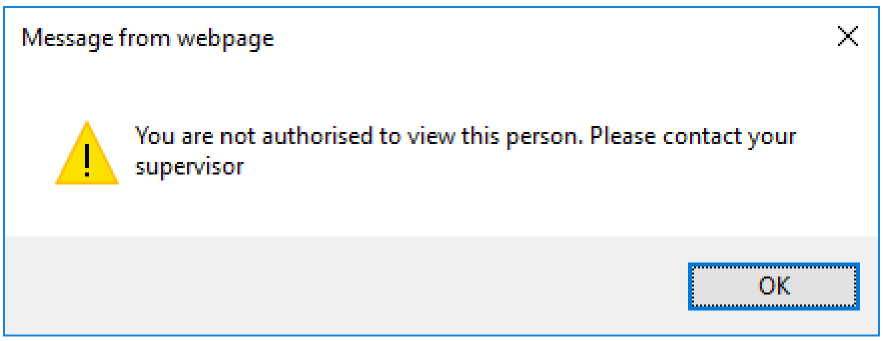
3. Click in the **Select users** field to display workers (with Normal User access) in your service. Select worker/s for whom access is to be restricted.





Click **Save**.

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



Key points:

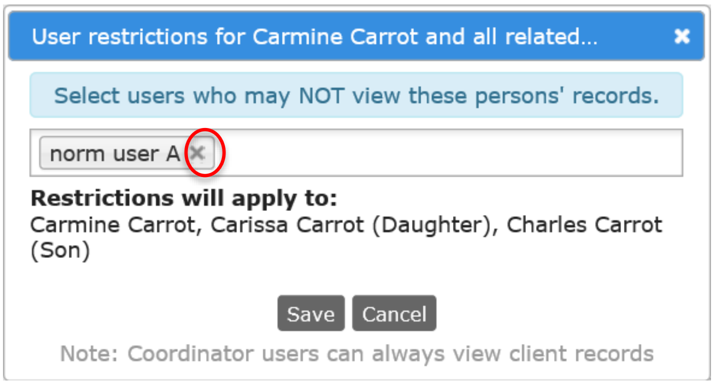
- Normal Users can only view lists they have generated. Identifying details and unstructured data is not included in lists run by Normal Users.
- Normal Users cannot access Associated Records from the Cases Page.
- If a worker creates a relationship with a Person for which they have access restricted,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

13.2 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.



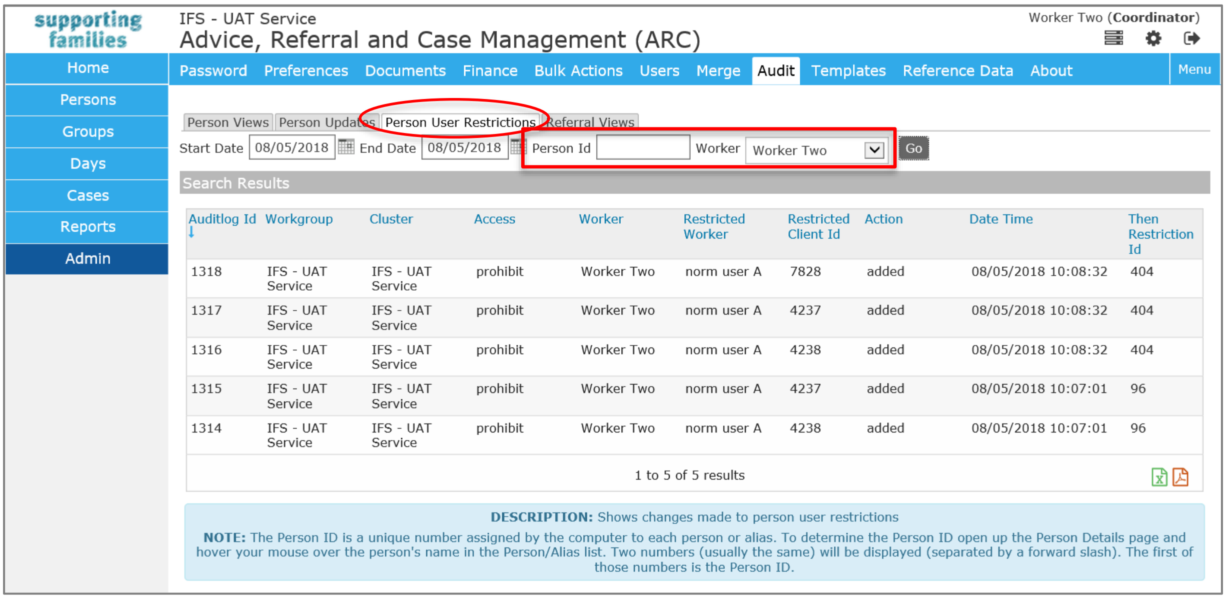
3. Click the **x** against the worker's name (as shown above) and **Save**.
   The message pop-up will no longer display.
   The worker will now have access to that Person's record, and the Persons with whom that Person has Relationships recorded.

13.3 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:

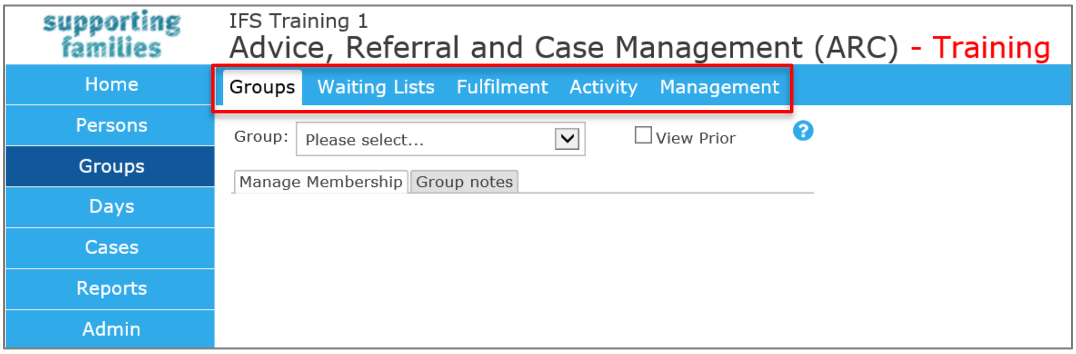
- Select the date range you wish to view restricted access activities for
- The **Worker** field refers to the User who applied or removed the restriction.
- The **Person ID** field is the numerical *Person Identifier* for the Person record for whom access has been restricted.



14 Managing Groups

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

The **Groups** page contains 5 tabs:

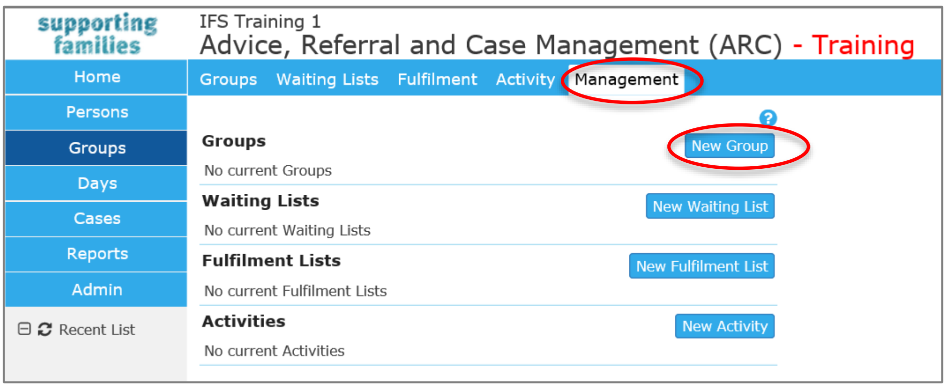


- **Groups**: to manage targeted group sessions delivered by your service. Membership and attendance at groups can be managed and recorded. Group Notes can be created for activities pertaining to the delivery of that group activity, recognizing attendance and capturing worker time spent on these activities. Time recorded in Group Notes is included in your *Service hours* within the *ARC Performance Report* and *OASIS Report* (with details displayed in the corresponding Lists).
- **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 support groups and/or do not involve client participation. Time recorded in Activity records is not included in your *Service hours*.
- **Management**: to create new Groups, Activities and Lists. Retains register of all items created.

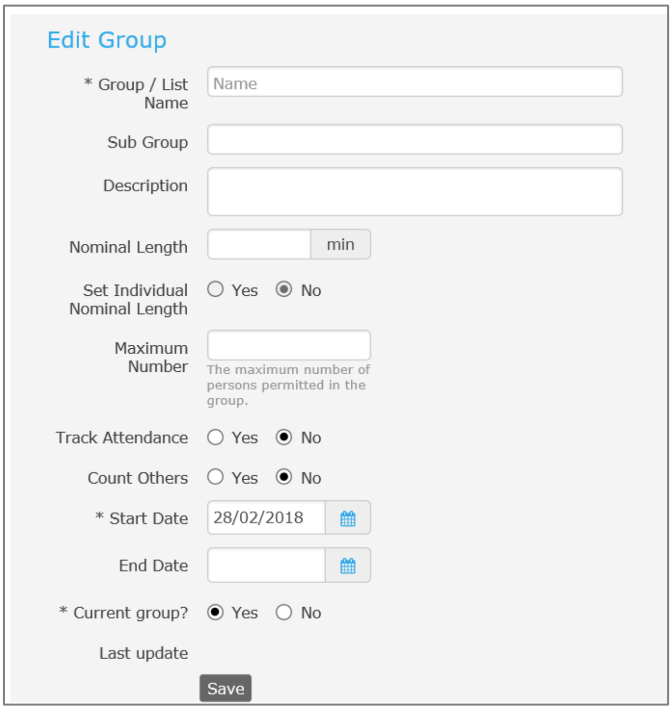
This is standard functionality from the Infoxchange SRS product. For additional guidance on using these features, click on the Help icon to access SRS Help.

14.1 Adding a New Group

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

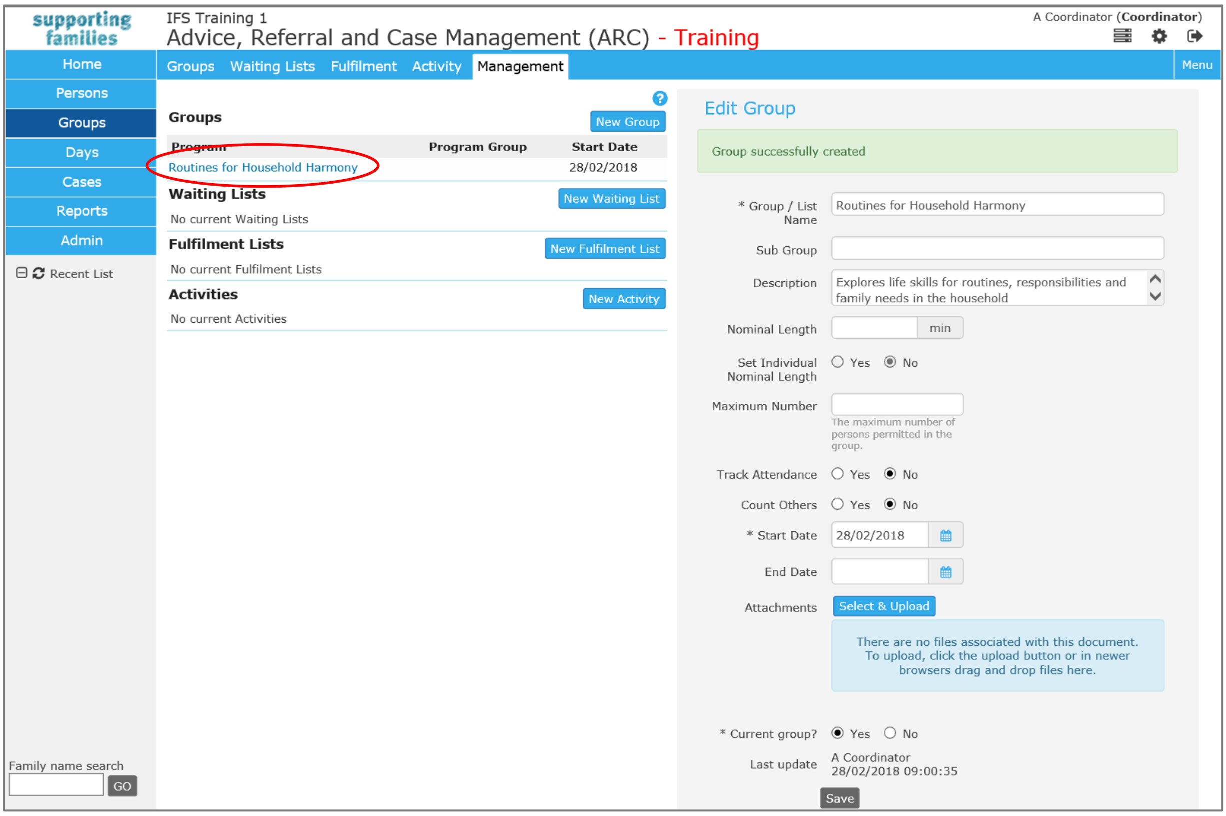


2. Complete details and click **Save**.



- *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.
- *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 the section **What does Track Attendance do?** 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 the Group was created in ARC.
- *Current group?* – defaults to 'Yes'.
- Click **Save.**

A message will appear to advise the Group has been successfully created, as shown in the following screenshot.



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.

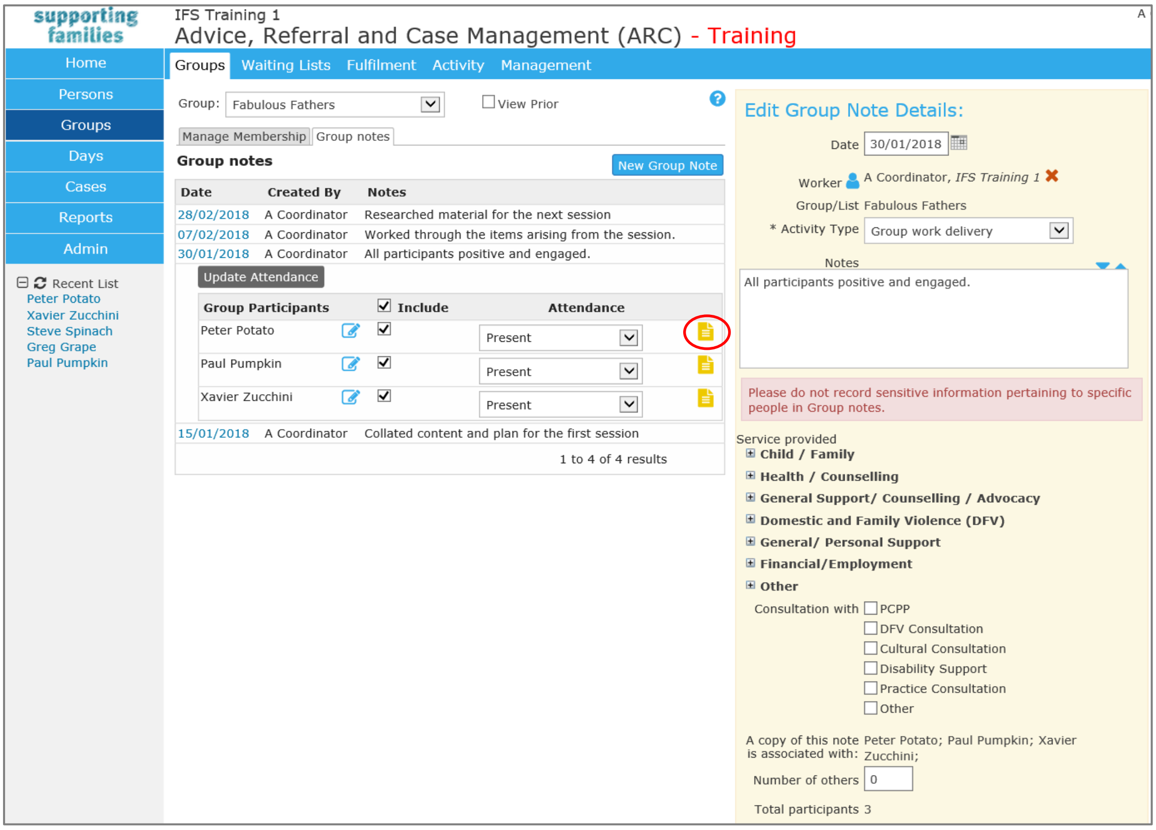
- Any relevant documents are able to be attached to the Group template.

- 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?

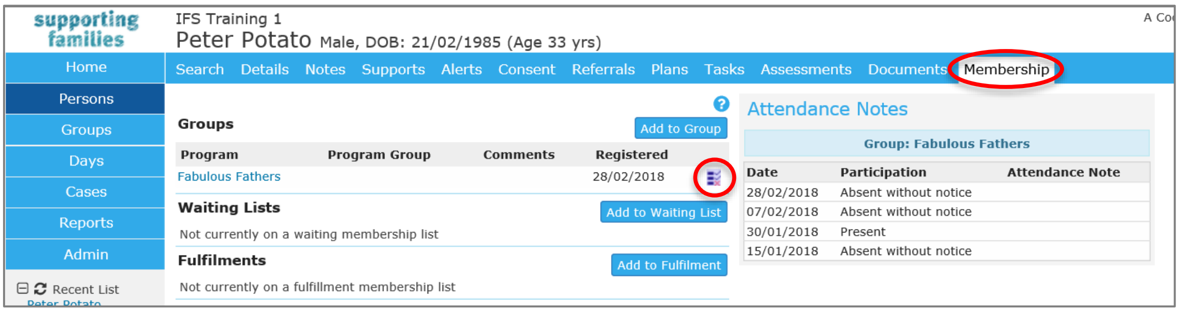
Where **Track Attendance** is selected as *Yes* (when creating the Group), an *Attendance Note* is created (and displayed on the *Attendance Notes* link the Membership tab for that Person) for all Group Notes recorded for that Group. This is standard SRS functionality.

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, <u>not</u> just for those the Person attended.



Services need to assess the value of this and determine their required procedure.
If Track Attendance is set to 'No', the *Attendance Notes* do not appear, 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.

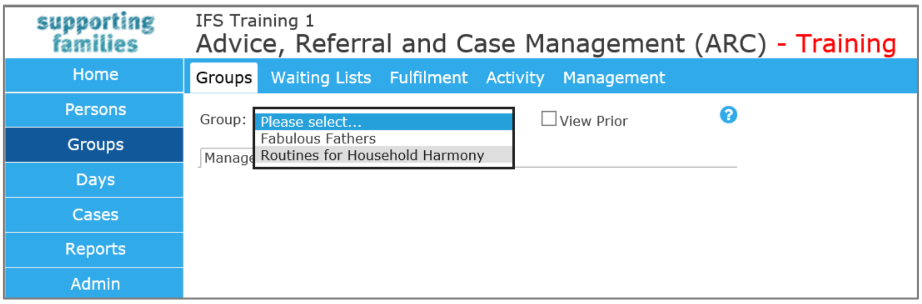
14.2 Add a Person to a Group

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

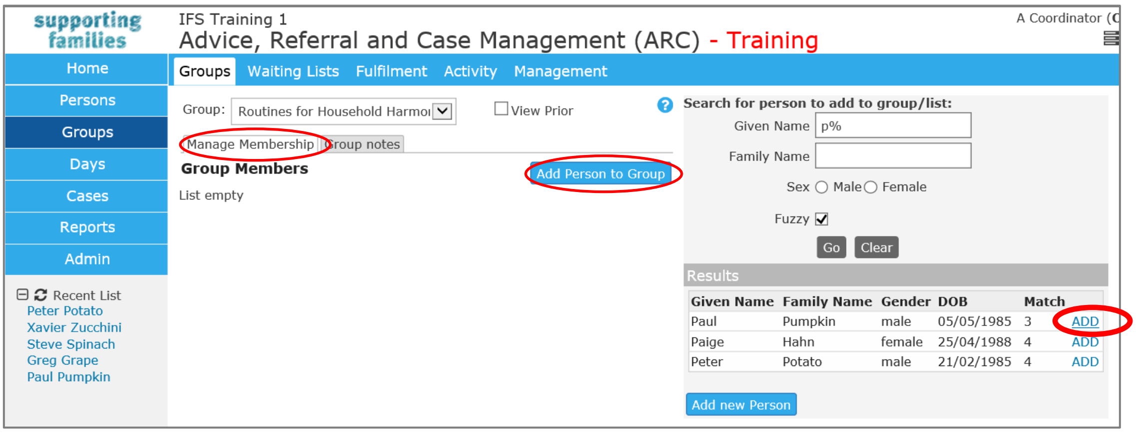
1. On the Groups tab, select individual records
2. On the Groups tab, copy selected members from one group to another
3. On the Person page, Membership tab.

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

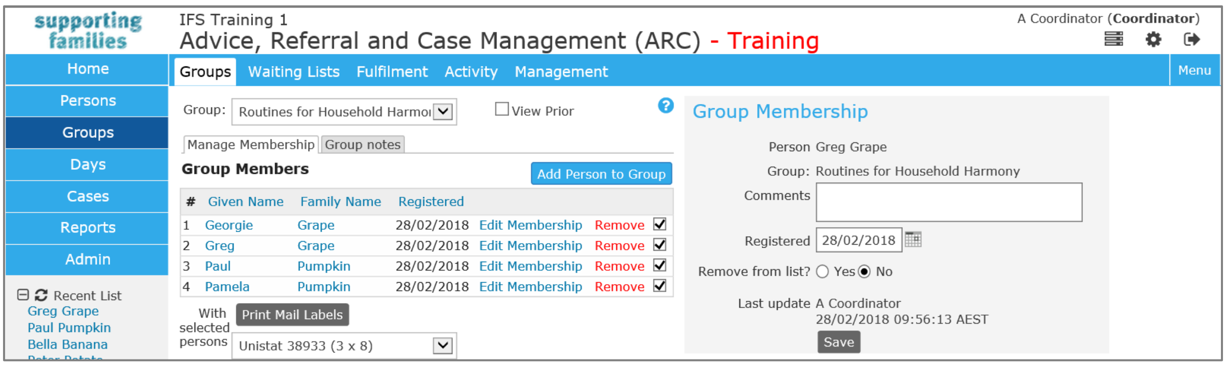
1. From the **Groups** tab, select the required group from the drop-down list.



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



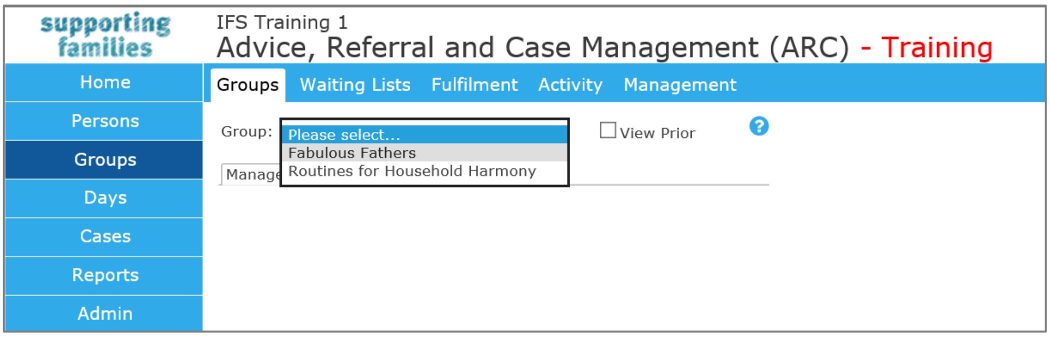
3. Enter any comments for each person, if relevant, and click **Save**. The Person is now listed in Group Members.



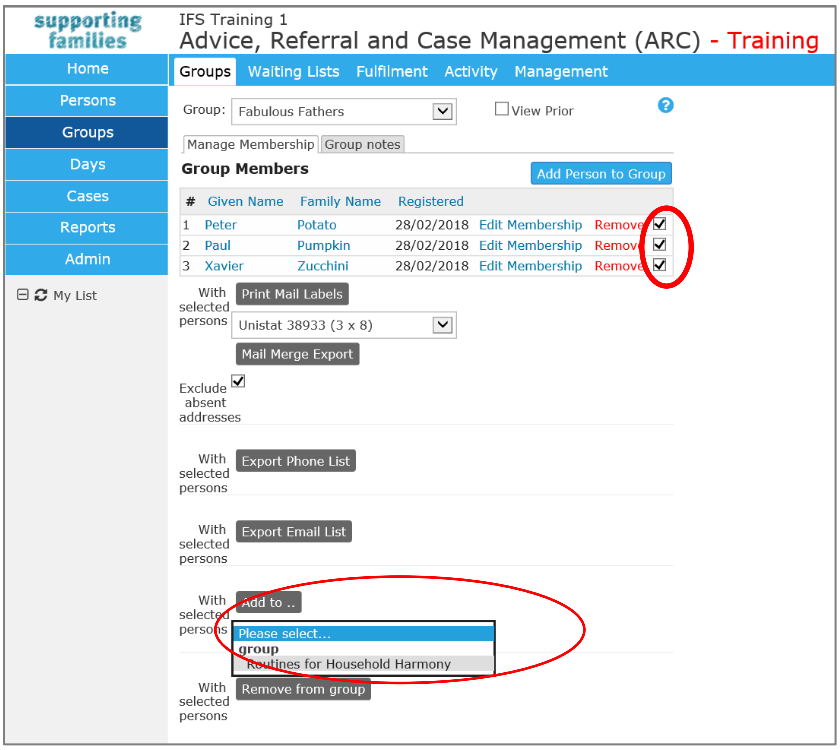
4. Repeat the above steps to add required Persons to the Group.

<u>Option 2:</u> 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.

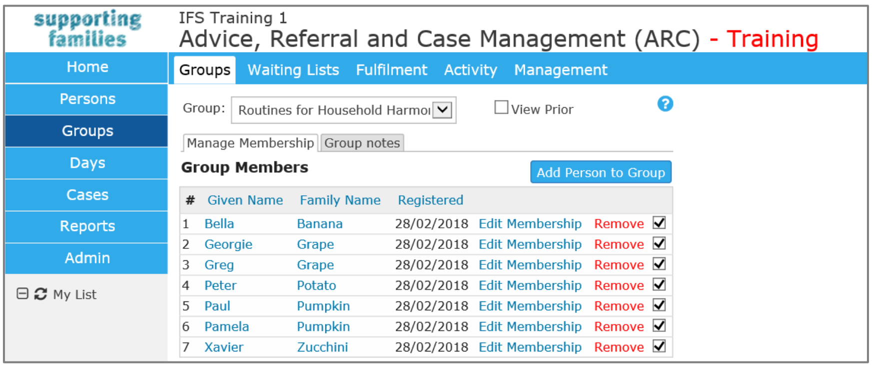


2. Select the persons to be copied to the new group by ensuring their check box is ticked, and in the **Add to** section below, select the group to add the persons to and click **Add to .**



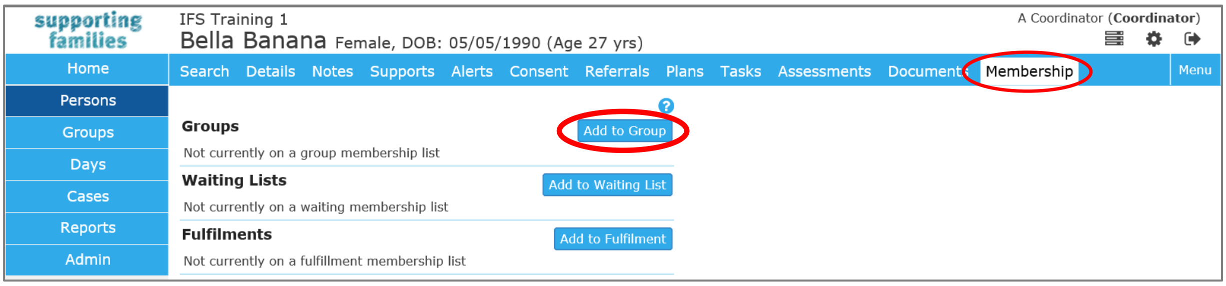
..

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

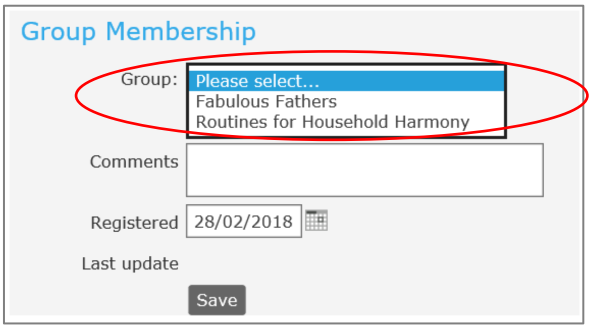


<u>Option 3:</u> On the Person page, Membership tab

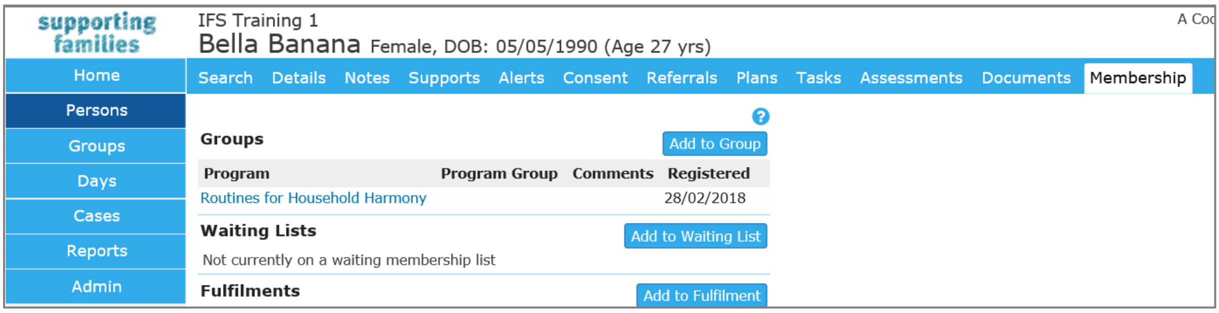
On **Persons** page, **Membership** tab. Select **Add to Group**.



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



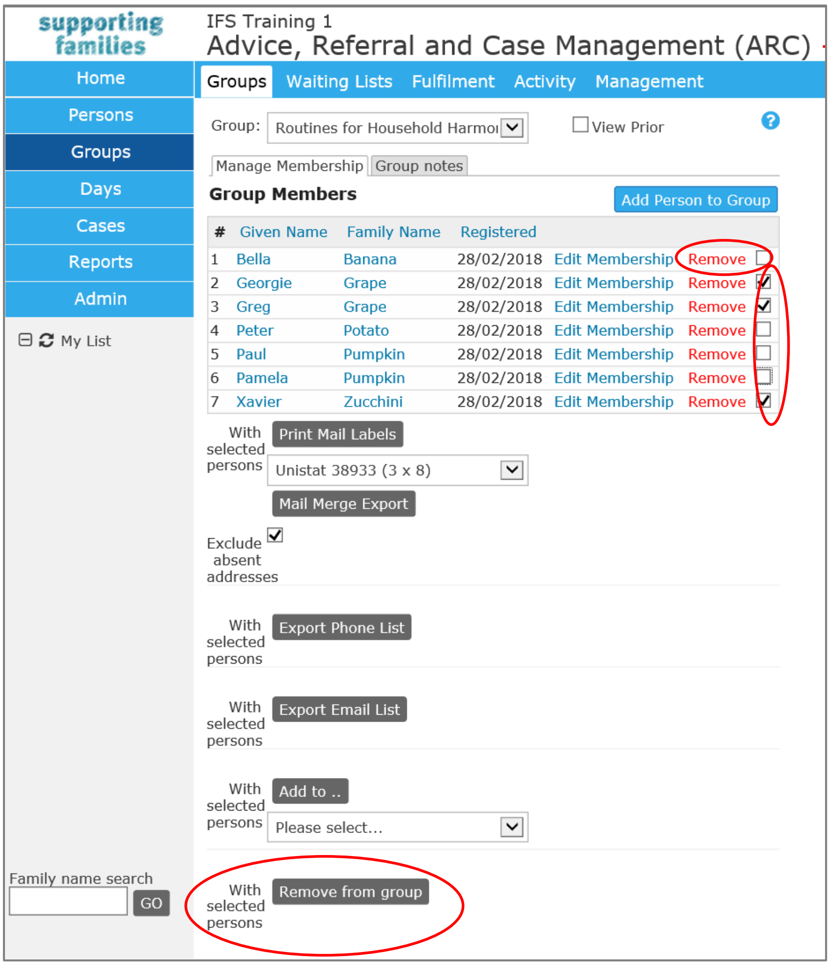
Registered date defaults to today's date.



14.2.1 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.

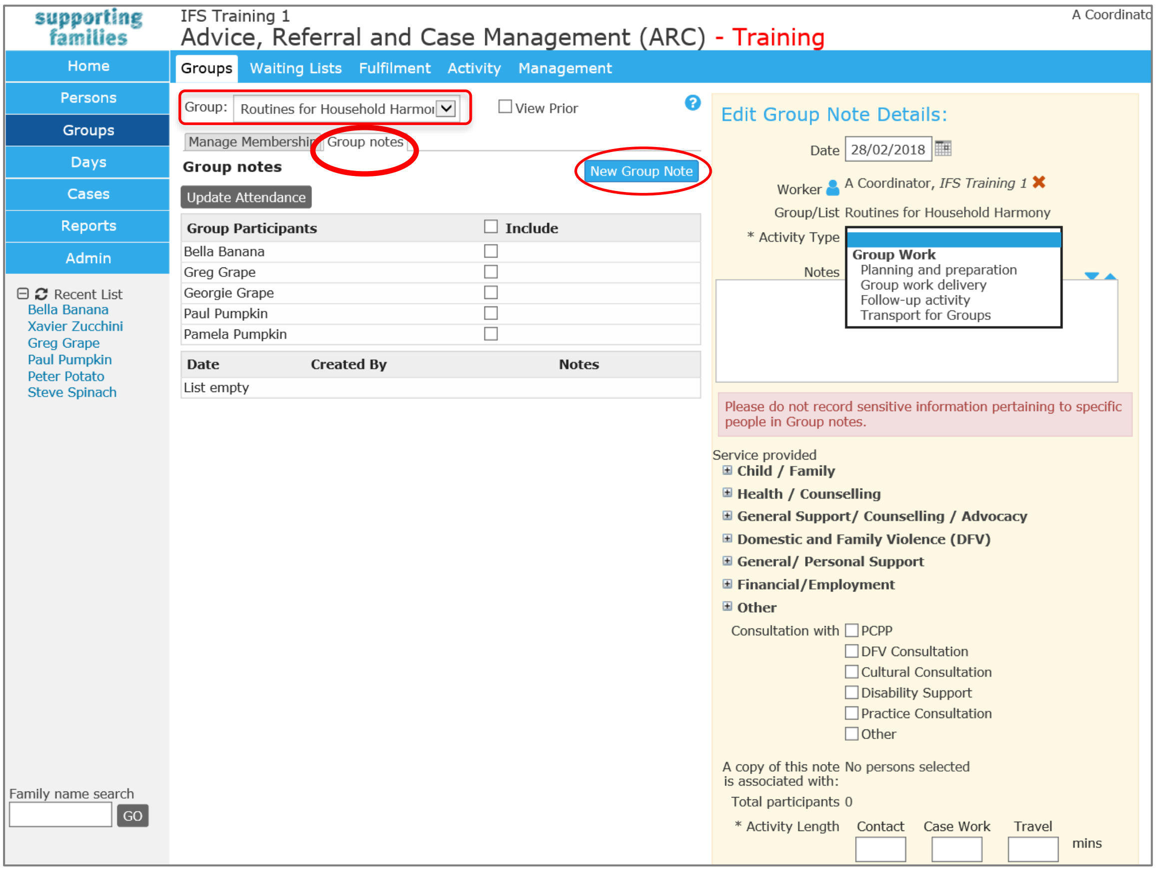


14.3 Record actions for the Group

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.



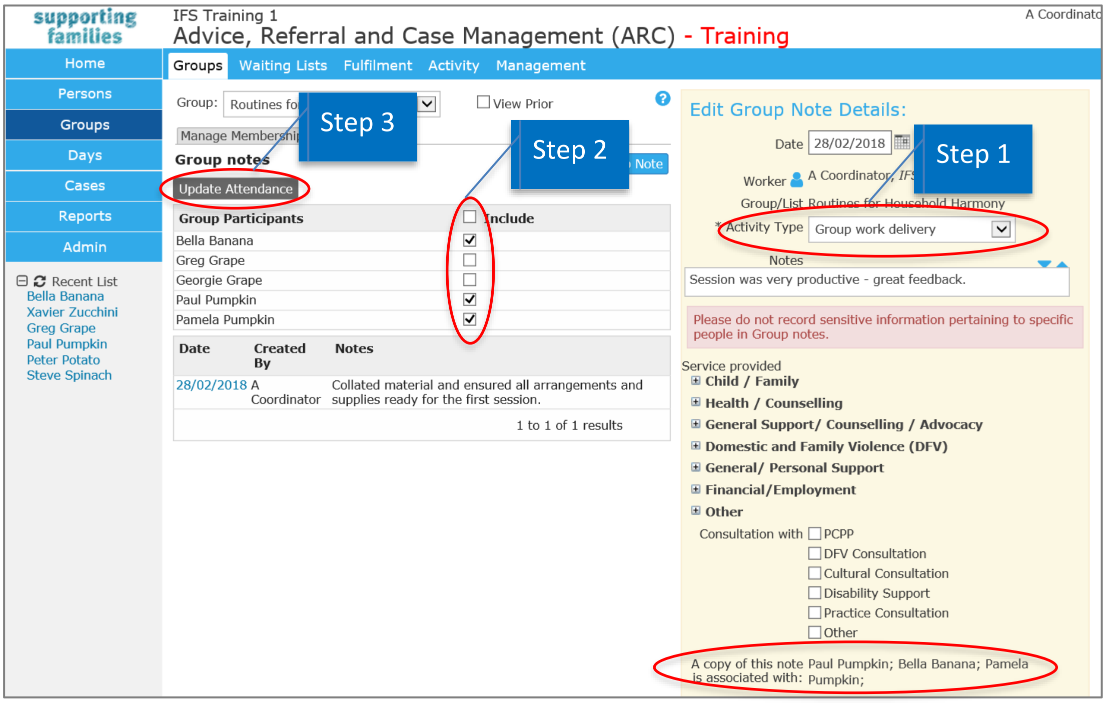
Complete the fields as required:

- **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.
  Where the **Activity Type** = *Group work delivery*, <u>to associate this note with group members</u>:
  - 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: <u>This must be done **prior** to saving the Group Note</u>.



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

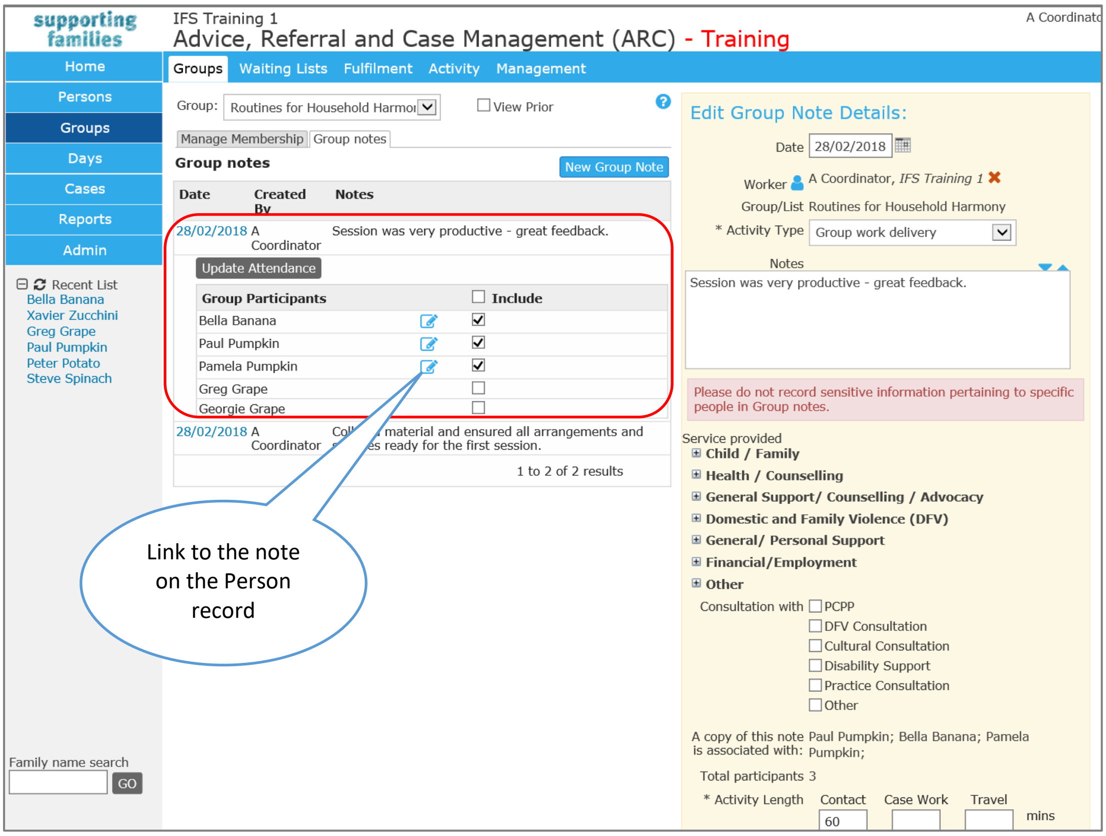
- Check the **Services provided** (multiple can be selected), and **Consultation with** section, as relevant

- 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 <u>non-group members</u> 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.

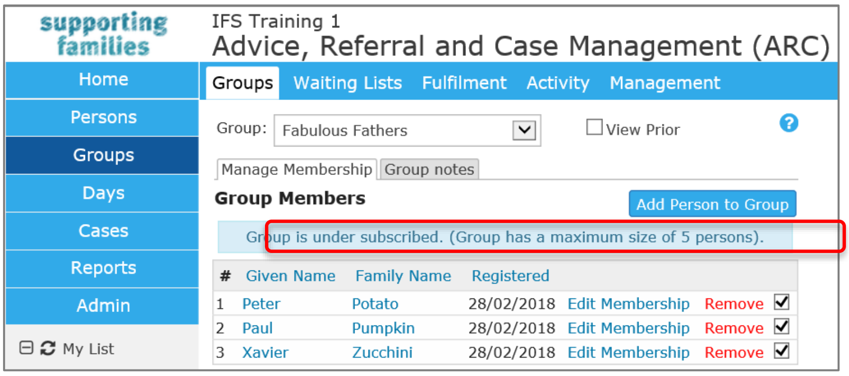
The Group Note is copied to the Person record for those where attendance is marked. If sensitive information is recorded in the Group Note, it will be visible from all attendees' Person records. If a worker is restricted from accessing the records of one member in the group, they are able to view the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

14.4 Manage the number of participants in a Group

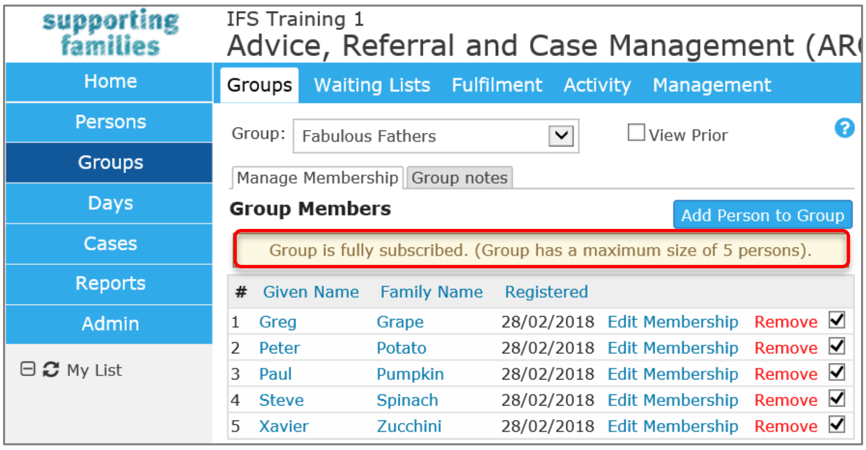
Where a number was recorded in the ‘Maximum number’ field when the Group was created, relevant messages display for that Group (on the **Groups** tab), as shown in examples below.

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

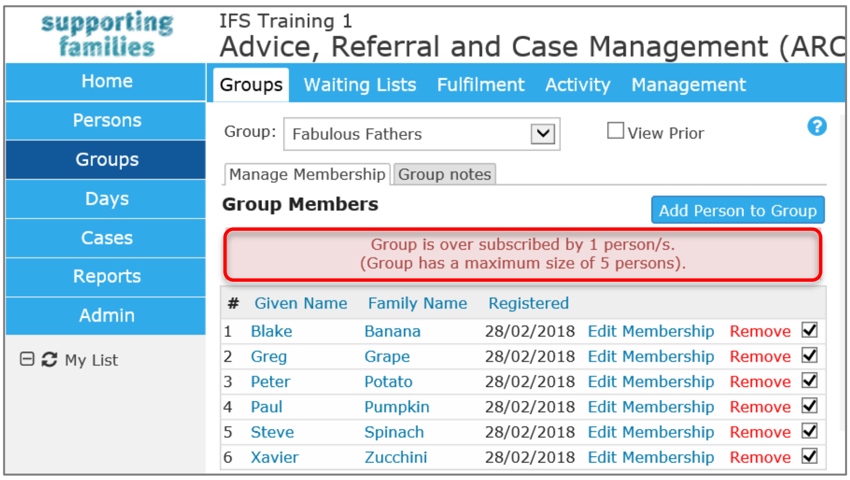
- Where the Maximum Number has not been reached



- Where the Maximum number has been reached



- Where the Maximum number has been exceeded



15 Days

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

15.1 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.

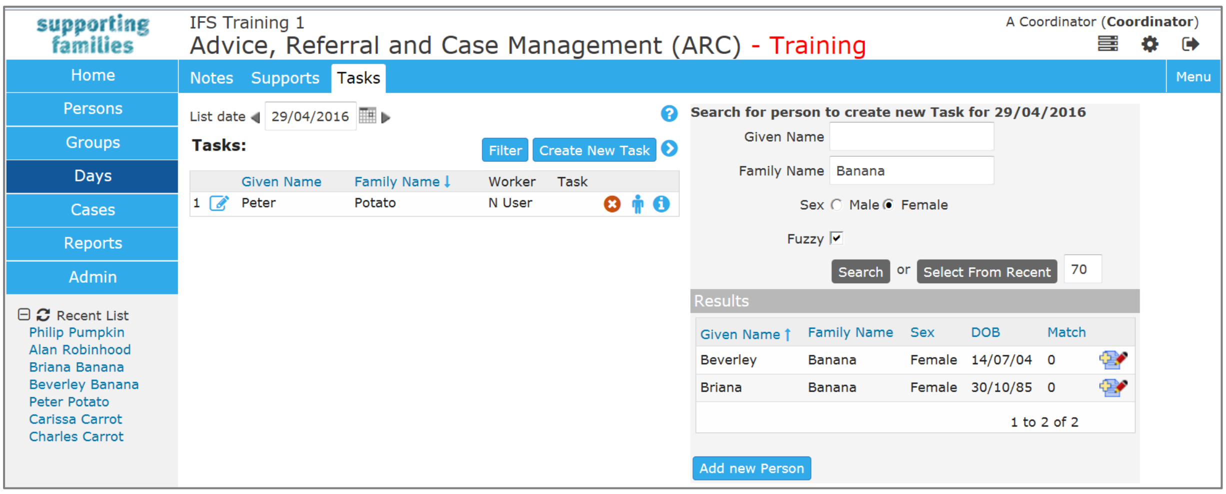
Click the icon to open the record. Click the icon to open the **Person** record.

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.

15.2 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.

16 Documents

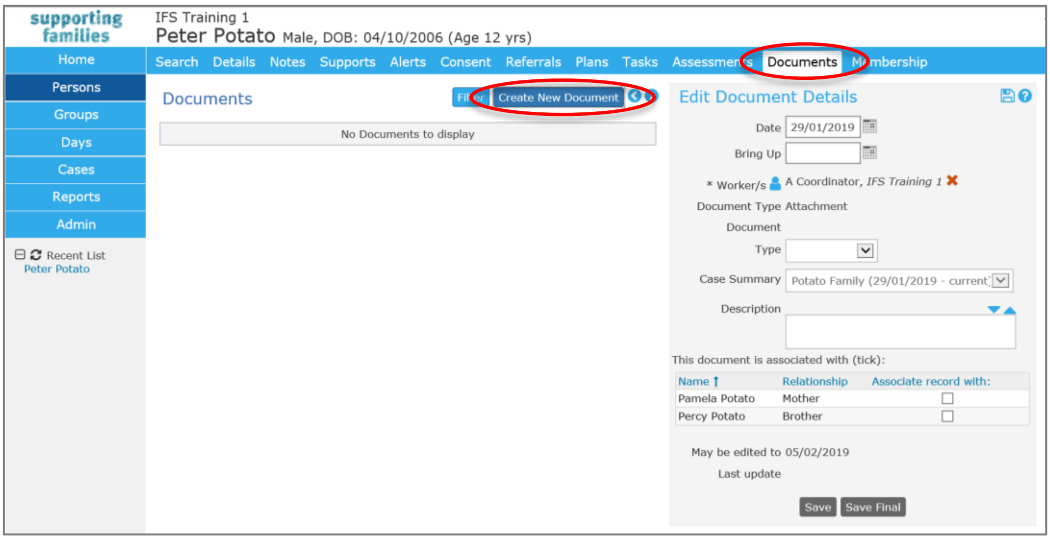
Documents may be associated with a Person record in two ways:

- 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.

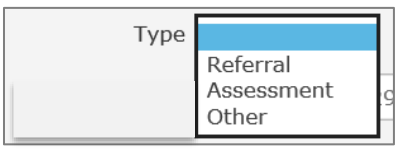
16.1 To attach a Document to a Person record

1. From the **Persons** page, (in the required Person record), select the **Documents** tab.

   Click **Create New Document**. The Edit Document Details form will appear to the right of screen.



2. **Date** defaults to today's date - an alternative date can be selected by clicking the calendar icon.
3. Enter the **Bring Up** (review) date by clicking the calendar icon, if required. (This will appear on your My Actions tab on the Home page.)
4. **Worker/s** icon - defaults to the worker creating this document record. If relevant, click on the blue person icon to add additional workers.
5. Select **Type** (of document) from drop down list:



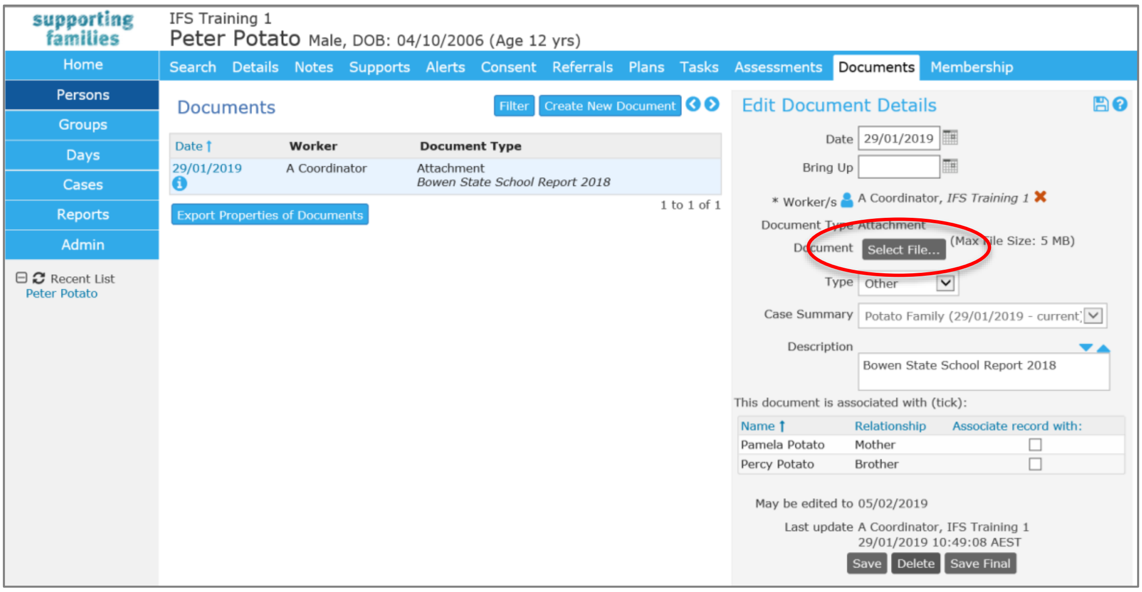
6. The Case Summary field auto-populates the current Case Summary for this Person. <u>**NOTE:**</u> Documents relevant to the **Case / Case Summary** should be attached to the **Case Summary** record.

7. Add a **Description** of the document. (This description will be displayed in the Documents list on the left-hand side of the screen).

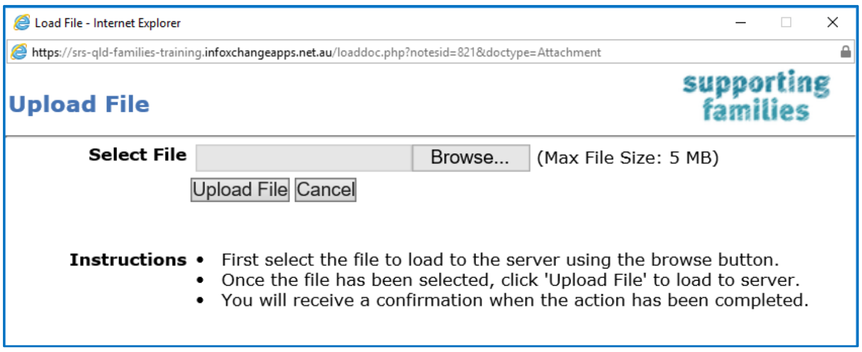
8. **Associated with**: Only where relevant, indicate related persons for this document. The document record will be copied to their record.

9. Click **Save**.

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

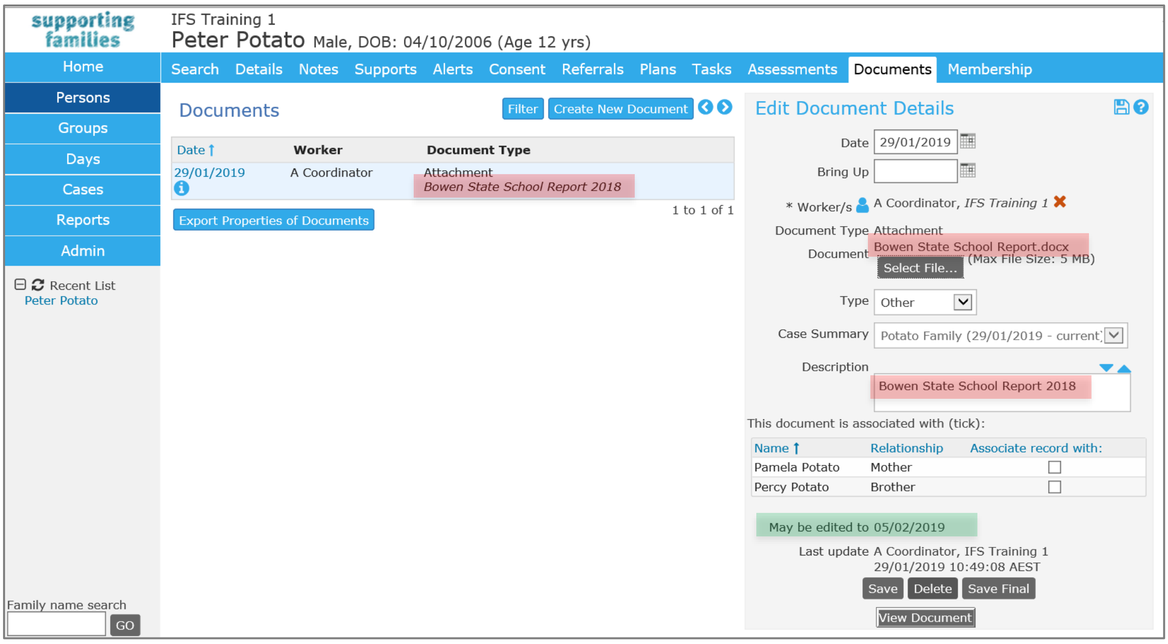


11. Click **Select File...** and the following dialog box will appear.

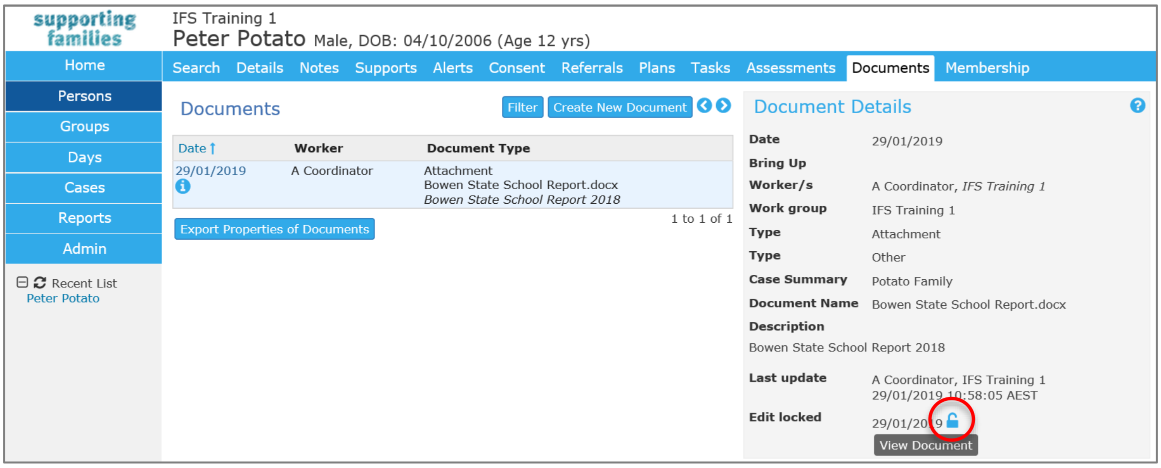


12. Click **Browse** and locate the file you would like to upload.

13. Click **Upload File,** then **Close**. The document will be attached to the Person record and the filename will be displayed in the Document field.



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



Users with Coordinator access are able to unlock locked records by clicking on the blue unlock icon (this does not display for workers with a Normal user access profile).

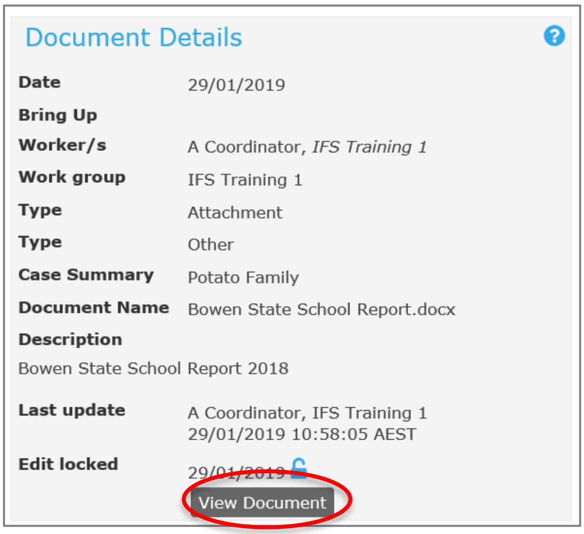
Additional Notes:

- 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.

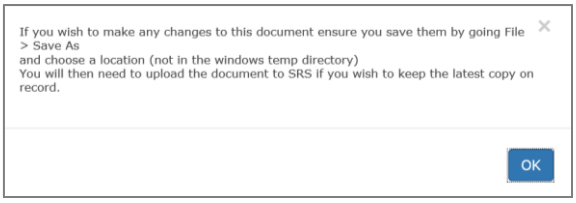
16.2 Viewing & Changing Documents

16.2.1 To view the document

1. Click **View Document**.



<u>Important Note</u>: If you view the attached document and make changes to the document, the changes will <u>not</u> 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.

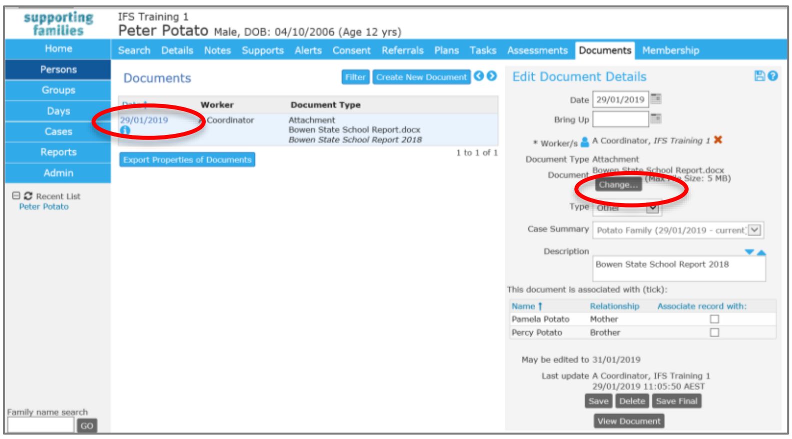


Click OK.

16.2.2 To change the document:

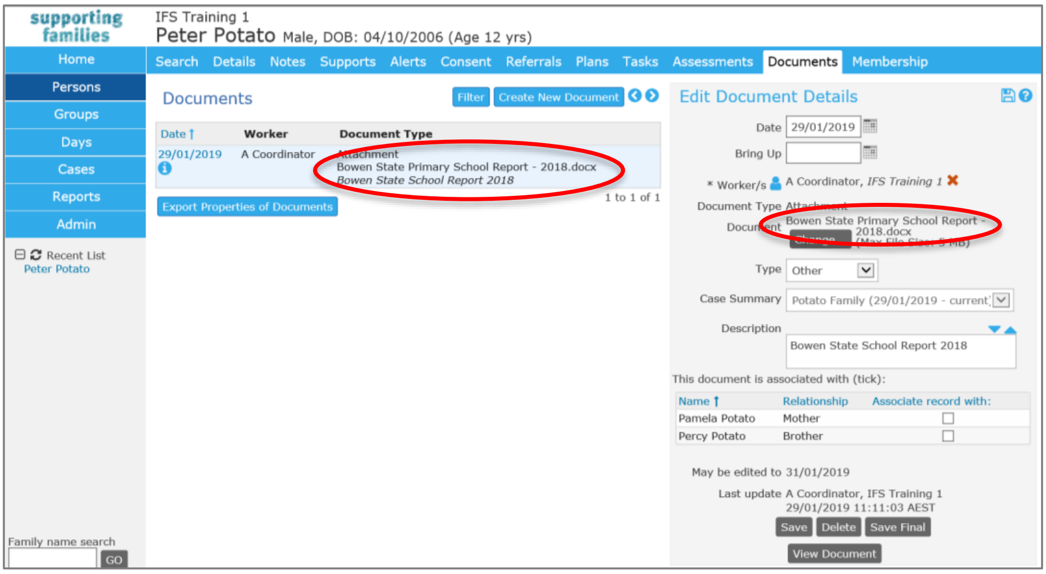
1. The Document record must not be locked in order to perform this task.
   Click the document date displayed in blue to open the **Edit Document Details** form – it will appear to the right of screen.

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



3. 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.

4. Click **Save** to save the document or **View Document** to view the document before saving.



16.3 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.

Note that the merge document option will only show if merge templates have already been created for your workgroup.

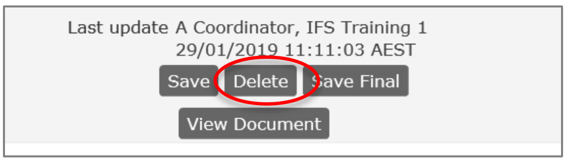
Additional Notes:

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

16.4 Deleting Documents

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

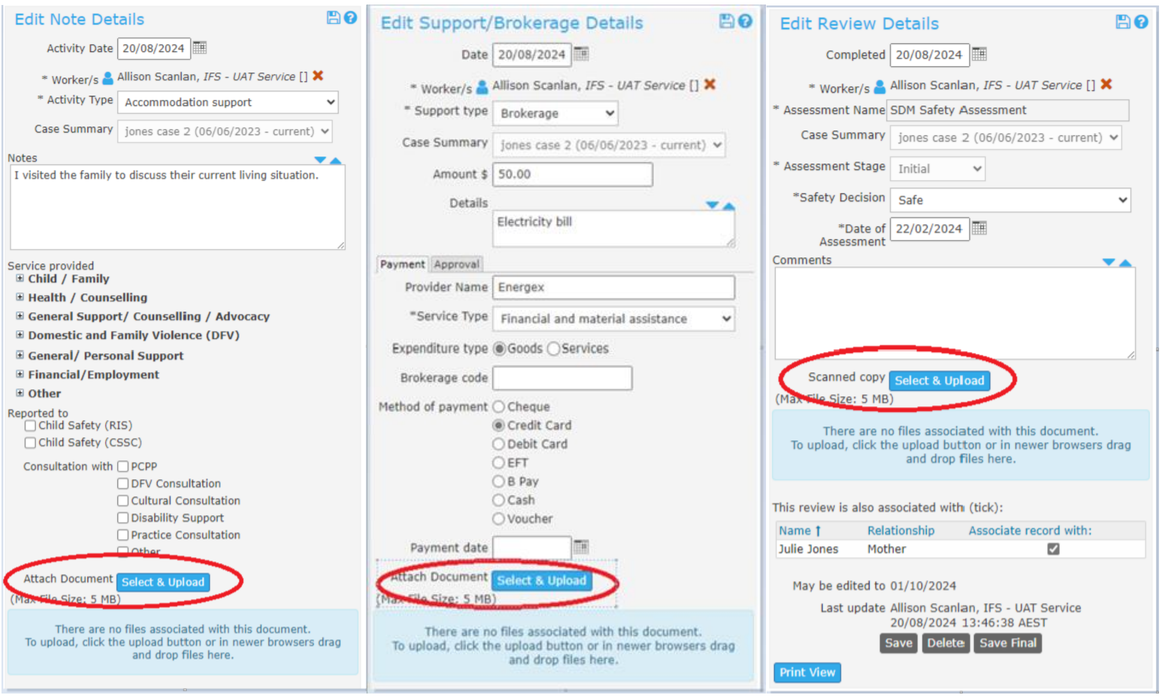
The Document record must be unlocked to access this feature.



16.5 Attaching Documents to other objects

Documents can also be attached to the following objects: Notes, Support/Brokerage; Consent, Plans; FAST assessment and grid; SDM Safety Assessment.

1. To attach a document to an object, complete the ojbect and save.
2. The option to attach a document will appear:



Important: these attachments will not be viewable in the documents tab

17 Reports

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

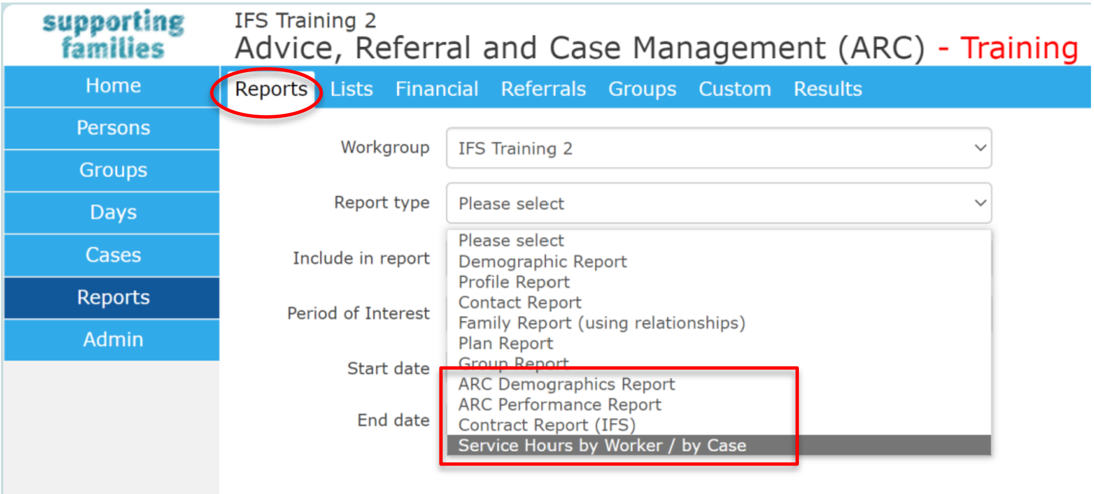
The different tab on the Reports Page access different report categories: Reports, Lists, Financial, Referrals, Groups, Custom and Results.

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

17.1 Reports

Reports are located on several of the tabs on the **Reports** page.

17.1.1 Reports tab



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

The following reports 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.

- ***Contract Report***

The *Contract 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 P2i by service providers.

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

- ***ARC Demographics Report***

The *demographics report* is a management tool which enables services to run reports that capture: case plan goals by suburb location; presenting concerns by referrals location; and age by location.

- ***Service Hours by Worker/by Case***

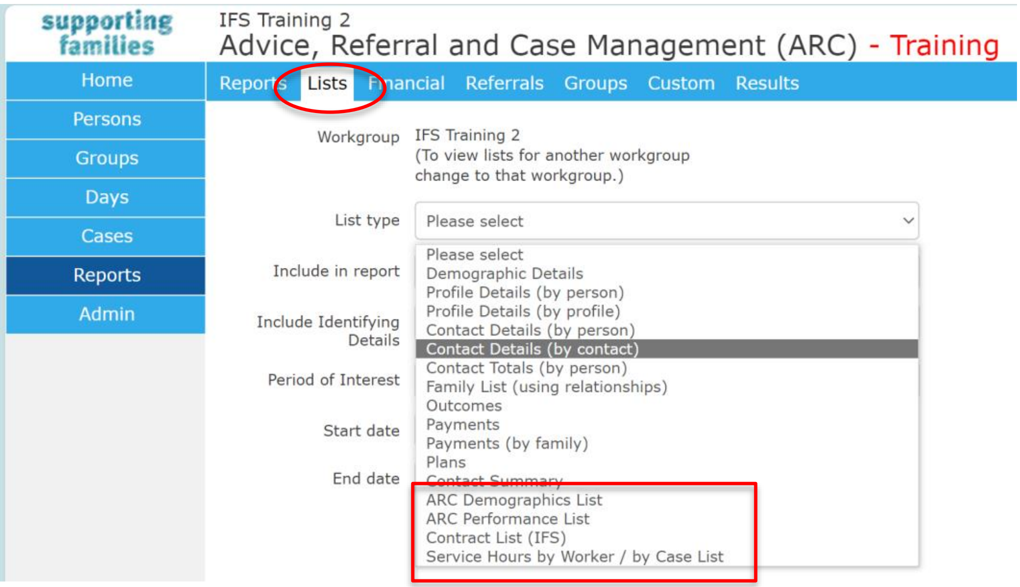
This report allows services to run accurate reports/lists for individual workers hours and to perform case reviews.

Running a *Worker Hours Report* will provide a table collating all ARC recorded time for Activity Types for that worker. These activities include all Case Notes, Groups, Activities and Enquiries the worker has been associated with.

Hours by Case will allow services to conduct a review of a case. Information provided will include times recorded per worker per Activity (Case Notes). Case reviews can be conducted on closed or ongoing cases

17.1.2 Lists tab

The **Lists** tab provides details of the individual records that have been used to generate the corresponding reports. The List results may contain additional fields from those displayed 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***, ***Contract List, Demographic List and Service Hours by Worker/by Case 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.

17.1.3 Financial tab

The **Financial** tab allows you to generate reports based on the data entered into the **Supports** tab within the **Persons** page.

17.1.4 Referrals tab

The **Referrals** tab allows you to generate reports about:

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

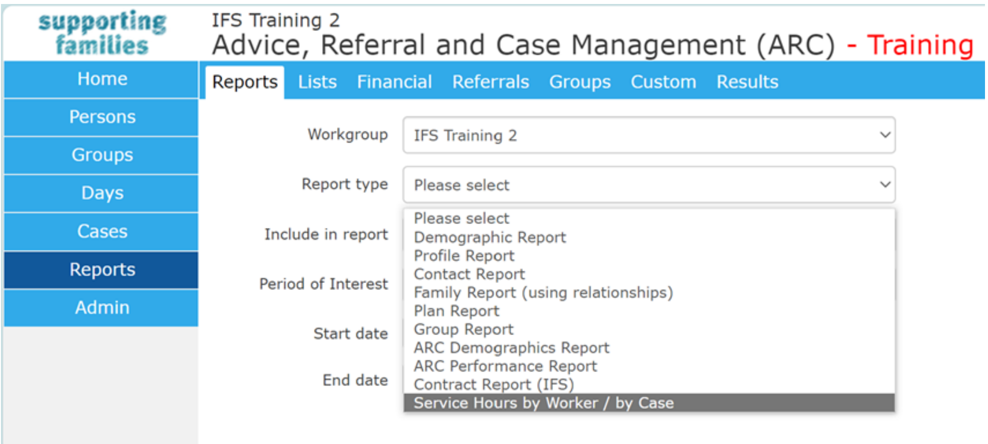
17.1.5 Custom tab

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

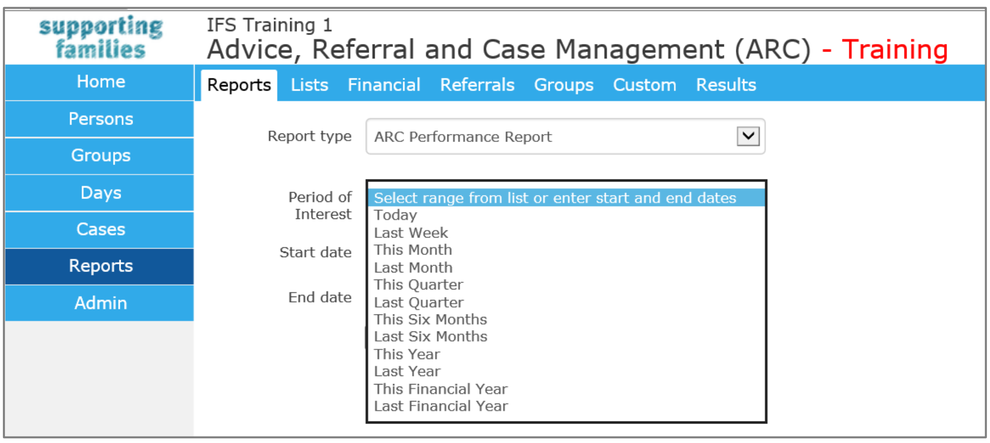
Custom Reports provide a variety of different ways to aggregate data, allowing users more flexibility in their reporting than the standard Reports tab. Using Custom Reports may also mean that you are able to run one regular report instead of multiple standard reports.

17.2 Generating Reports

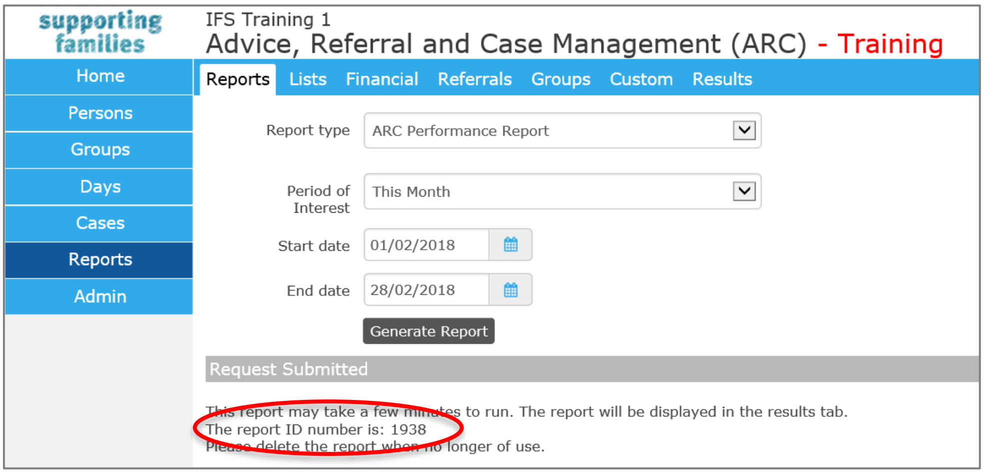
1. On the **Reports** page, **Reports** tab, select your **Workgroup** and the **Report type**.



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



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



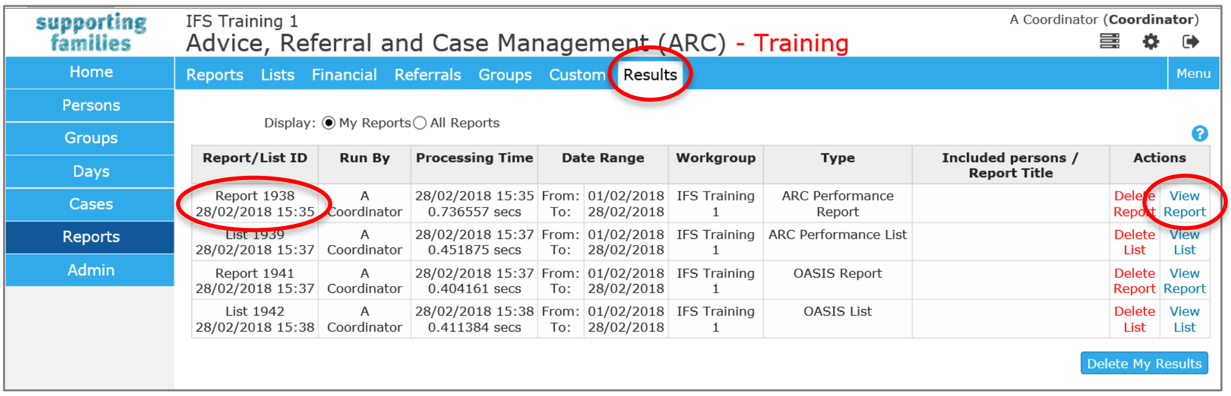
The report can be accessed from the **Results** tab using the report ID number (highlighted above).

17.3 Viewing Report Results

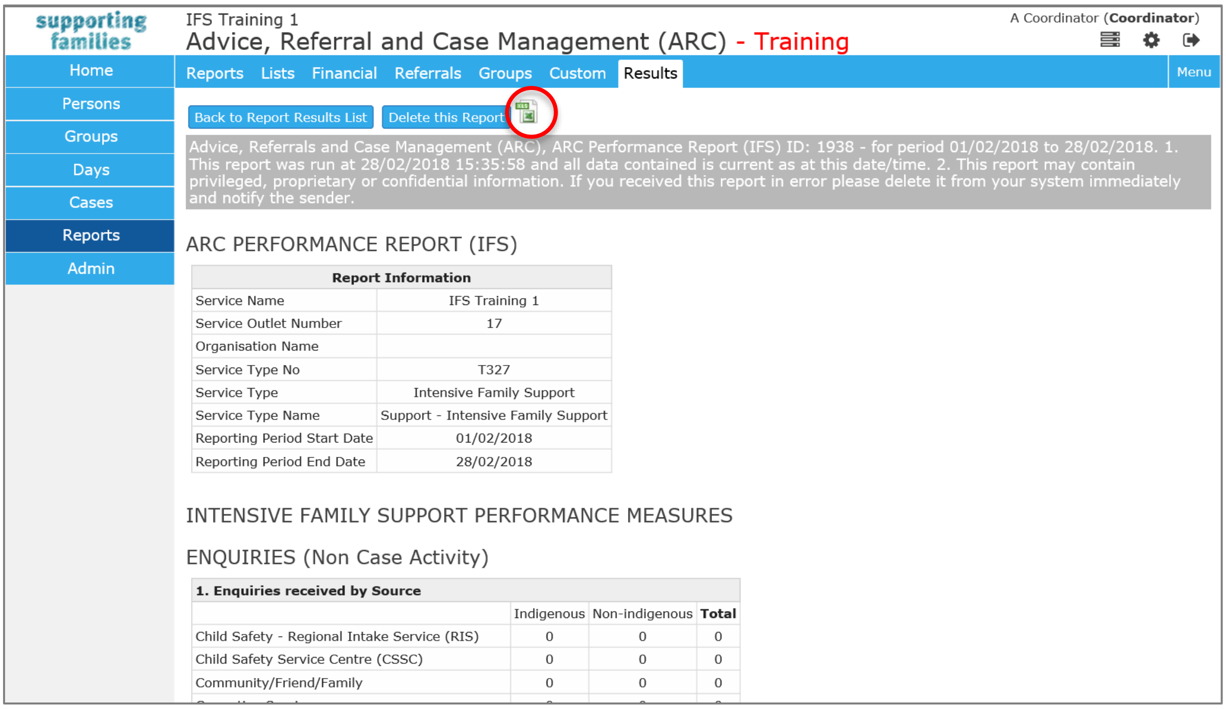
The **Results** tab allows you to view and delete reports generated through the Report tabs.

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.



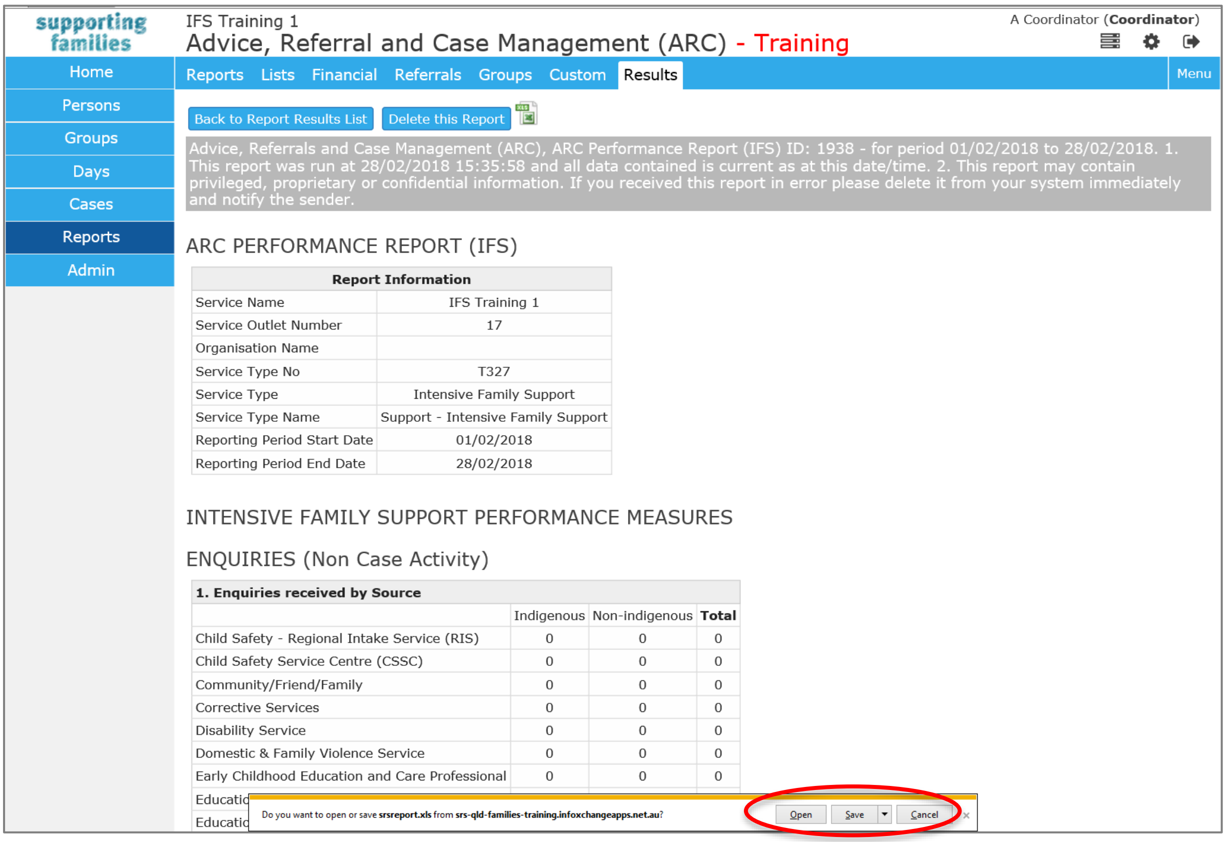
1. To delete a report from the **Results** tab, simply click Delete Report.
2. A pop-up message will appear - click **OK** to delete the report or **Cancel** to retain the report.

17.4 Exporting Report Results

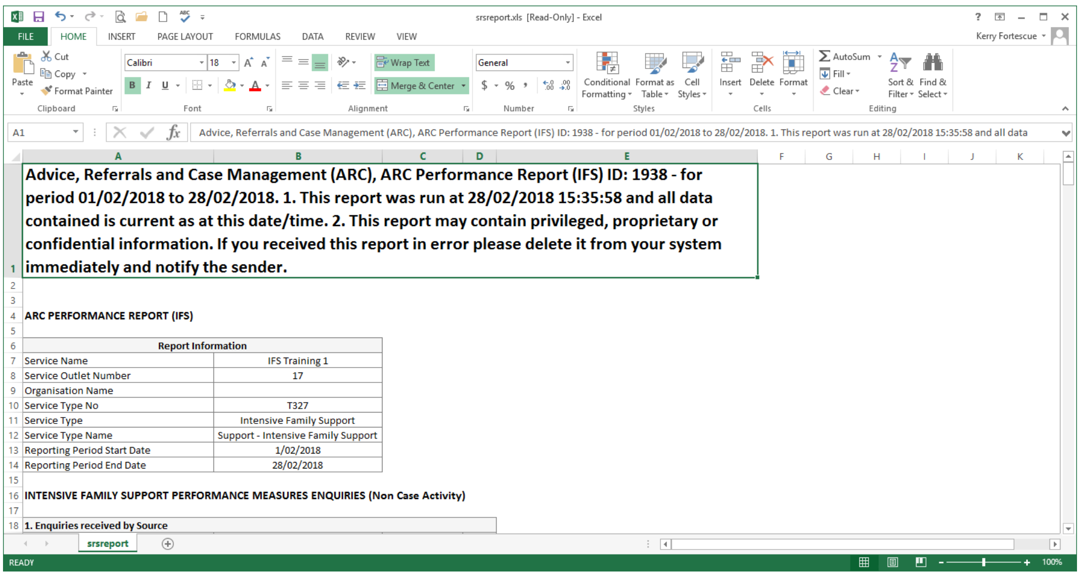
Reports are able to be exported to Excel. This enables users to perform their own analysis of the data and to use it in other ways.

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

2. At the bottom of your screen, select either **Open**, **Save** or **Cancel**



The results are displayed in Excel. You are able to sort data as you may require.



18 Admin Page

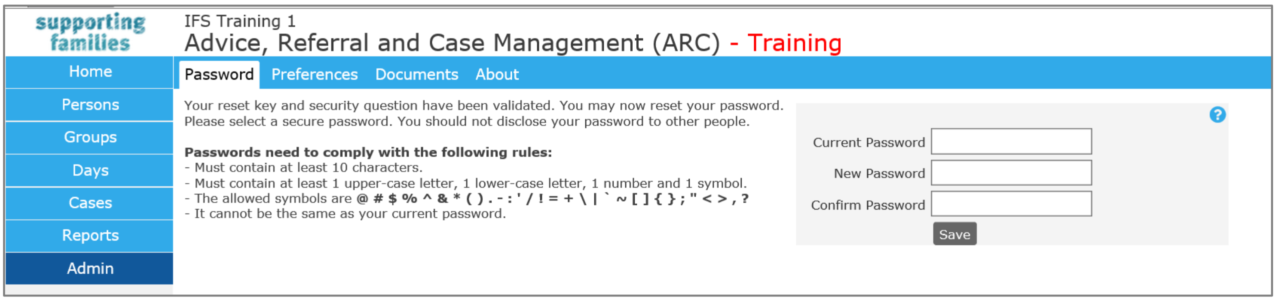
The tabs within the **Admin** page allow users to manage their logon, email address and other details used within ARC.

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.

18.1 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 must be at least 10 characters in length, contain 1 uppercase, 1 lower case, 1 number 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.

18.2 User Preferences

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

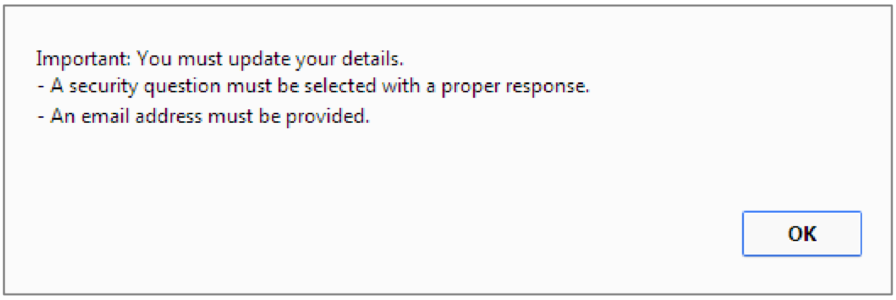
When logging on to ARC for the first time, users will be directed to the **Preferences** tab to update their Email Address**,** Security question **and** Security response**.**

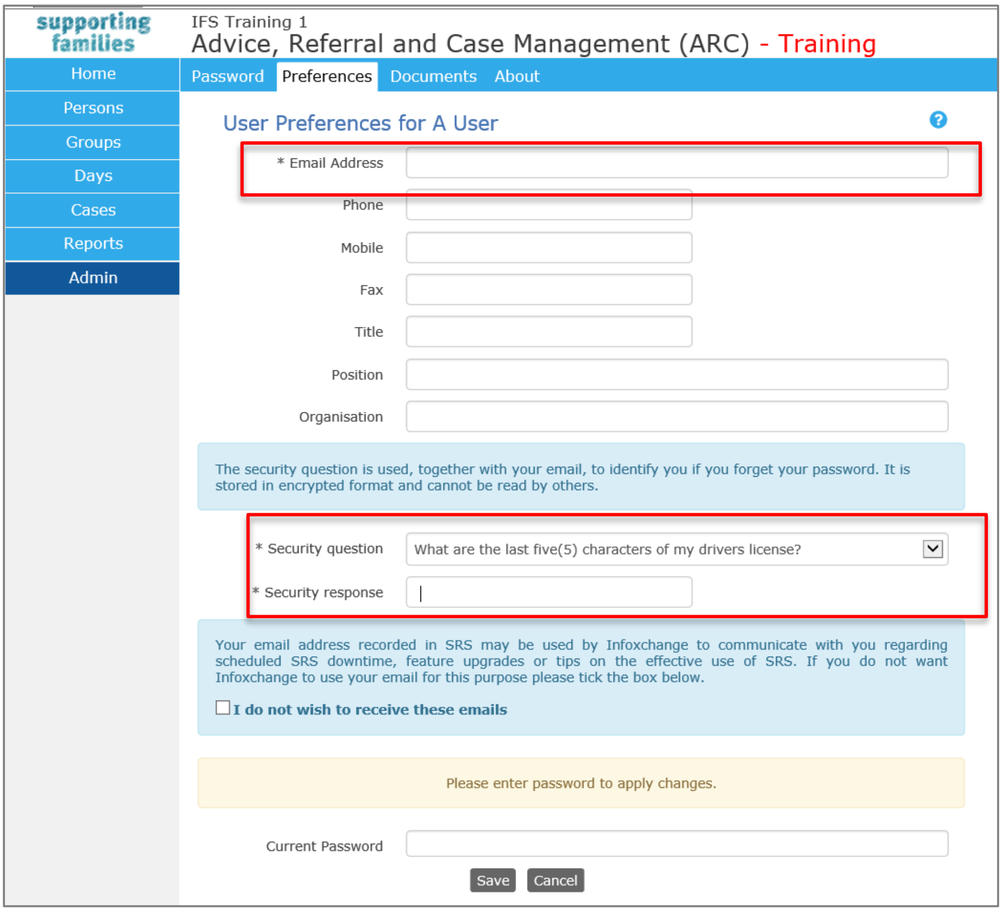
This information is used for identification should users forget their passwords and wish to make use of the Password Resetting function. Alternatively, your ARC Coordinator will be able to reset passwords.

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:

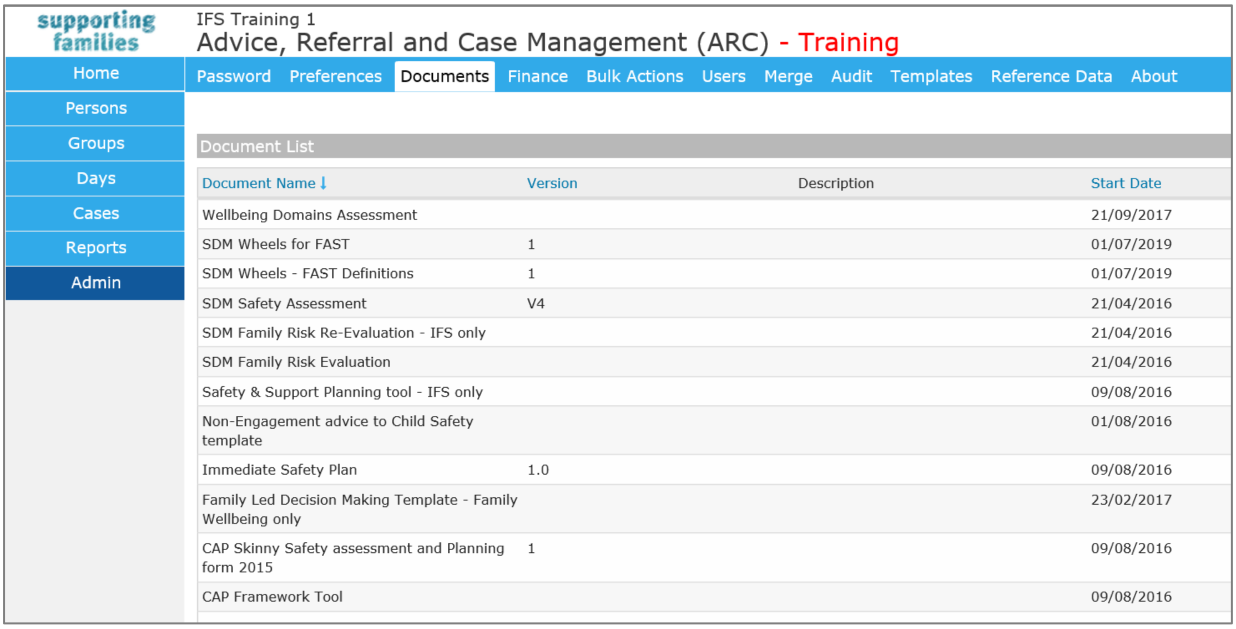

Important: You must update your details.
- A security question must be selected with a proper response.
- An email address must be provided.
OK


supporting families
IFS Training 1
Advice, Referral and Case Management (ARC) - Training
Home
Persons
Groups
Days
Cases
Reports
Admin
Password
Preferences
Documents
About
User Preferences for A User
* Email Address
Phone
Mobile
Fax
Title
Position
Organisation
The security question is used, together with your email, to identify you if you forget your password. It is stored in encrypted format and cannot be read by others.
* Security question
What are the last five(5) characters of my drivers license?
* Security response
Your email address recorded in SRS may be used by Infoxchange to communicate with you regarding scheduled SRS downtime, feature upgrades or tips on the effective use of SRS. If you do not want Infoxchange to use your email for this purpose please tick the box below.
I do not wish to receive these emails
Please enter password to apply changes.
Current Password
Save
Cancel

18.3 Documents

The **Documents** tab within the **Admin** page provides access to a general document reference area.

These are documents or other files that are of relevance across your service, not pertaining to an individual (Person) record.



Document Name	Version	Description	Start Date
Wellbeing Domains Assessment			21/09/2017
SDM Wheels for FAST	1		01/07/2019
SDM Wheels - FAST Definitions	1		01/07/2019
SDM Safety Assessment	V4		21/04/2016
SDM Family Risk Re-Evaluation - IFS only			21/04/2016
SDM Family Risk Evaluation			21/04/2016
Safety & Support Planning tool - IFS only			09/08/2016
Non-Engagement advice to Child Safety template			01/08/2016
Immediate Safety Plan	1.0		09/08/2016
Family Led Decision Making Template - Family Wellbeing only			23/02/2017
CAP Skinny Safety assessment and Planning form 2015	1		09/08/2016
CAP Framework Tool			09/08/2016

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

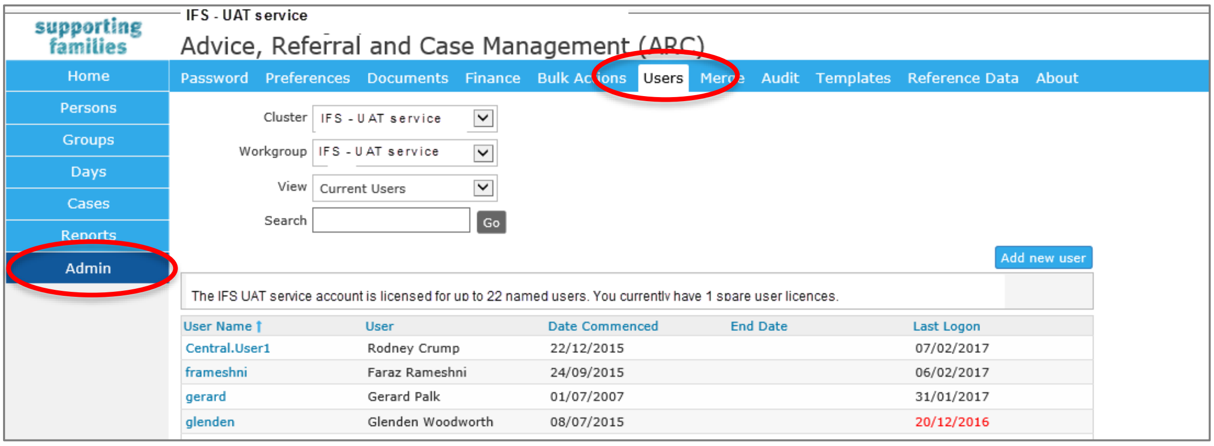
Please contact childandfamilycommissioning@dcssds.qld.gov.au if you would like additional documents available.

19 Coordinator Functions

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

19.1 User Management

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



19.1.1 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, IFS Workgroup has 22 named users and 1 spare licences. This means there are currently 21 allocated users.

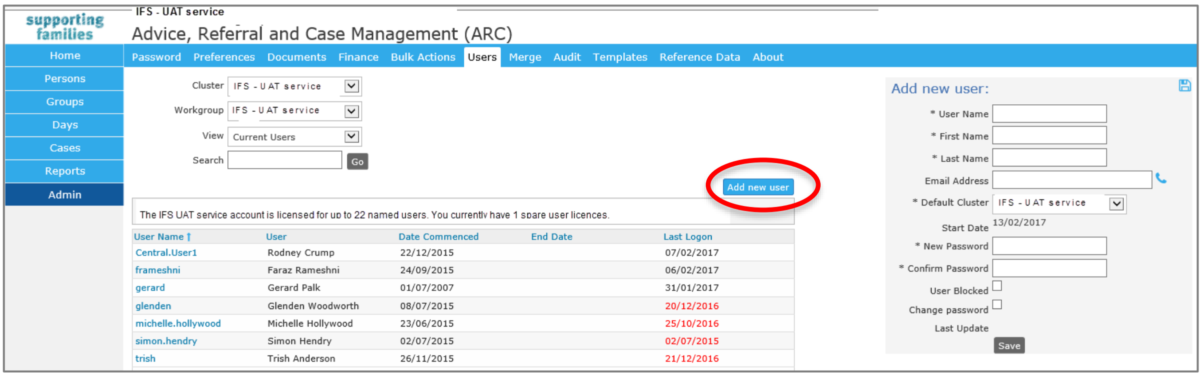
If you have no spare licences, the first step is to review the list of **Current Users** and see if there's anybody on that list who is unnecessarily allocated to your workgroup.

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

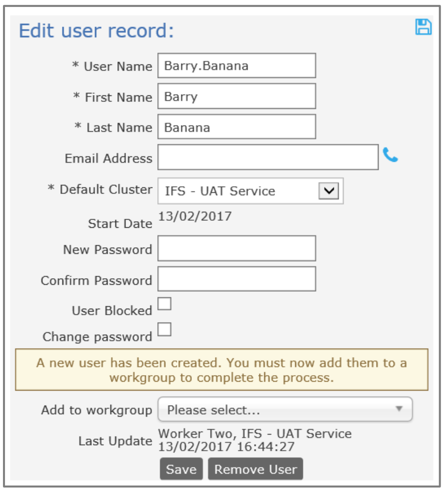
If you select ***Non-Current Users***, you can view users who are inactive.

Step 2: Create a new User:

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



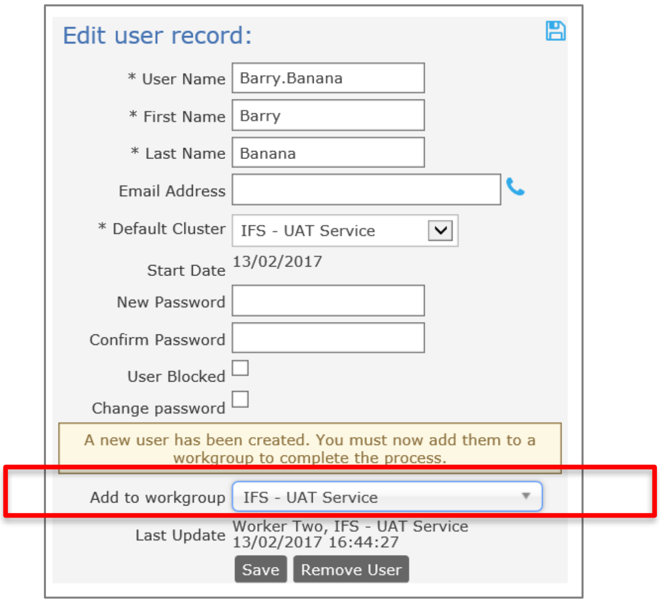
2. Enter the new **User Name** (User id). Please note that:
   - The **User Name** is case sensitive.
   - It is recommended that the naming convention of 'Firstname.Lastname' be followed. For example, if the user's name is John Smith, the new **User Name** should be 'John.Smith'.
   - The **User Name** 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, 3 spare licences will continue until this user has been allocated to a Workgroup.

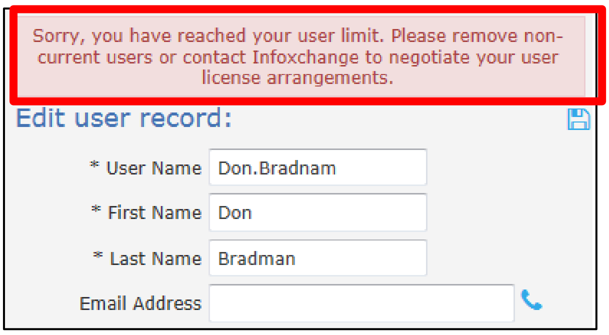
Step 3: Allocate to a workgroup:

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.

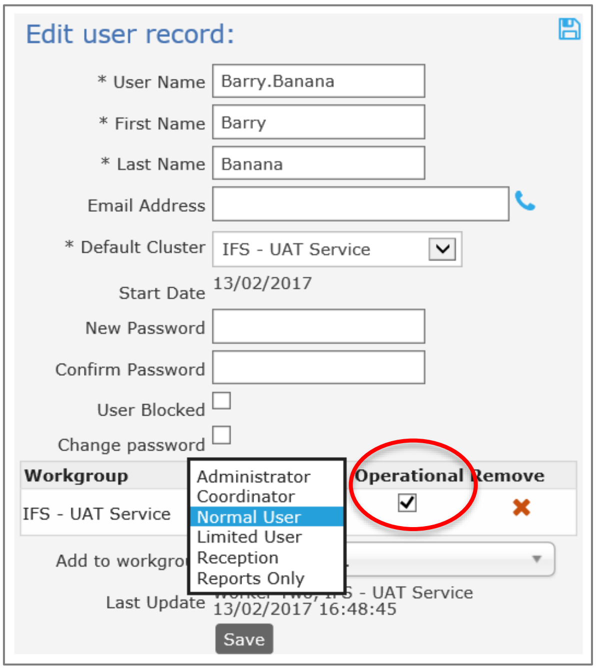


Step 4: Allocate the access level:

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	Coordinator
Manage Enquiries	✓	✓
Create Client/ Person	✓	✓
Create Case Summary	✓	✓
Manage Case (notes, payments, consent, plans, documents, etc)	✓	✓
Delete notes, payments, plans, etc	✗	✓
Unlock Notes	✗	✓
Create/ Manage Referrals	✓	✓
Performance reporting – basic	✓	✓
Manage Restricted Access	✗	✓
Performance reporting – advanced	✗	✓
Merge Clients/ Persons	✗	✓
Auditing	✗	✓
Manage document templates	✗	✓
Manage Users	✗	✓



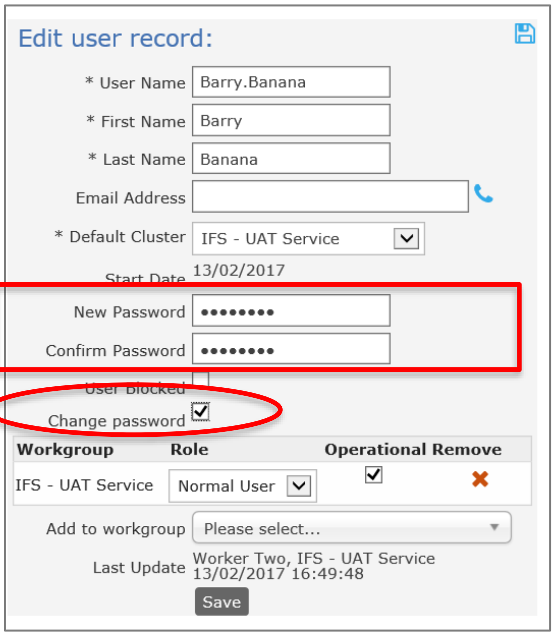
10. Where available, if the user needs access to another workgroup, make another selection from the **Add to workgroup** drop-down list and assign the required access level.

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.

19.1.2 Resetting a Password

To reset a user's password:

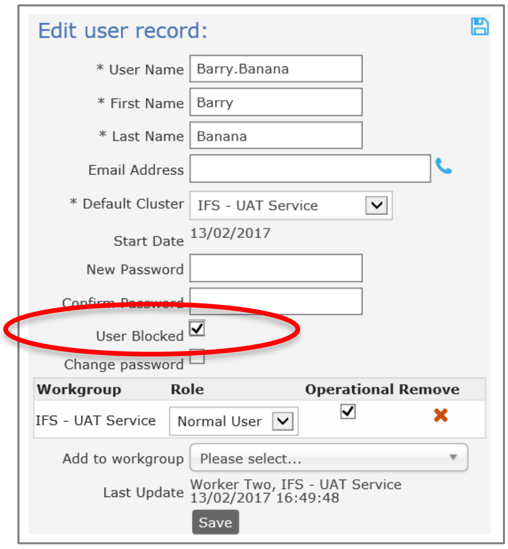
1. Open the **Edit user record** form by selecting the **User Name** from the list of Current Users.



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.**

19.1.3 Unblocking a User Account

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



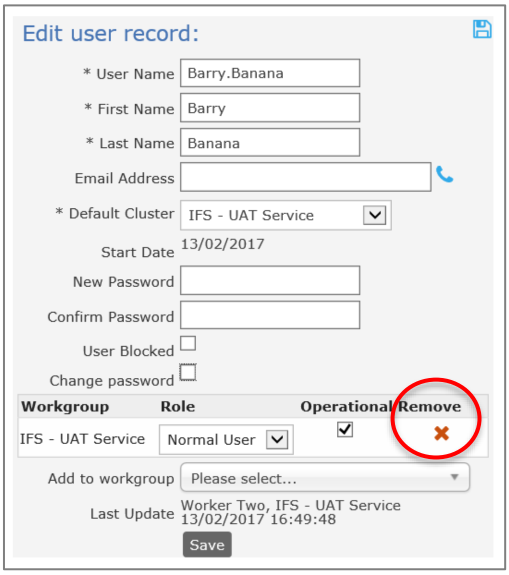
The user account can be unblocked by simply unchecking the **User Blocked** check box (highlighted above) and clicking **Save**.

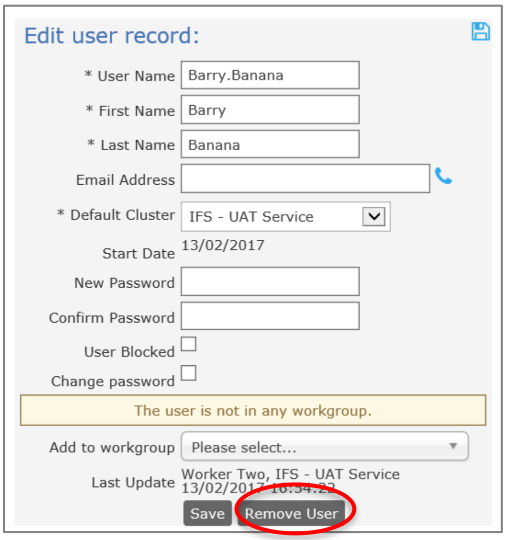
19.1.4 Removing User Access

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

The department will undertake quarterly user audits to reduce opportunities for unauthorised access to the ARC database and to monitor numbers of licences. Users who have not accessed ARC for 180 days or more will be deactivated but can be re-instated if access is subsequently required. Emails will be sent to users if further action is required, for example, duplicate accounts.

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.

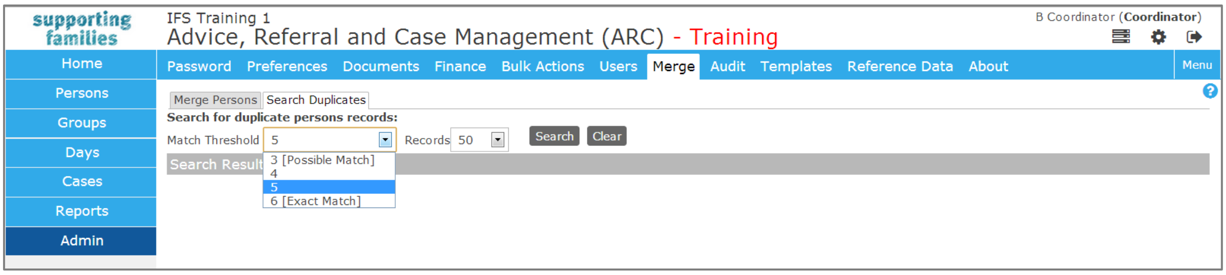
19.2 Merging Person Records

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.

19.2.1 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.

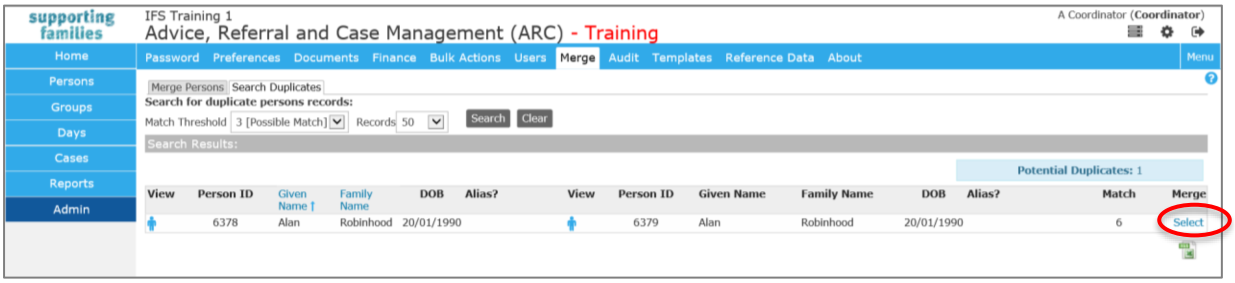


The **Match Threshold** field (displayed above) indicates the number of matching 'points' the Person records need to meet before they are selected and listed as possible duplicates. Matching occurs on the Given Name, Family Name and Date of Birth fields. Fuzzy name matching is also taken into consideration.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

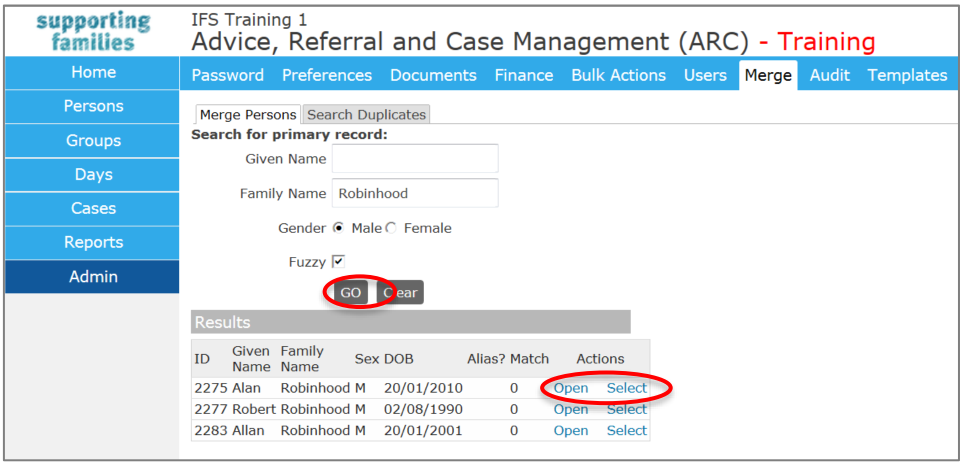
Additional Notes

- 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.

19.2.2 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.

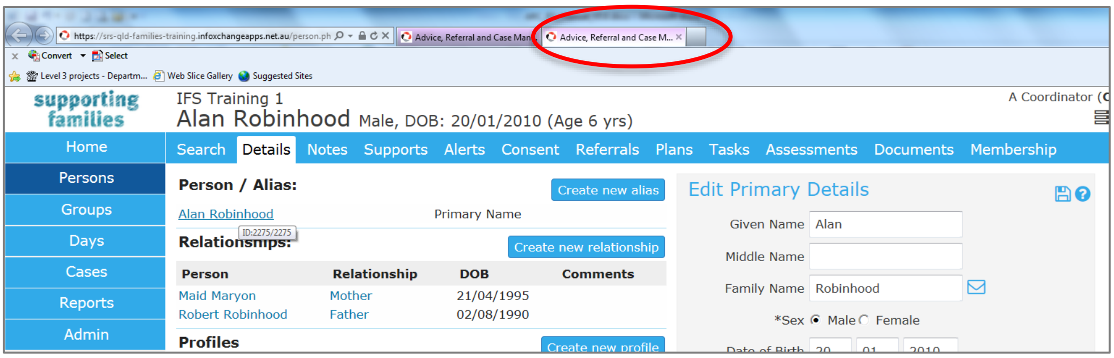
2. Click **GO** and a list of possible primary person records will be displayed.



   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.

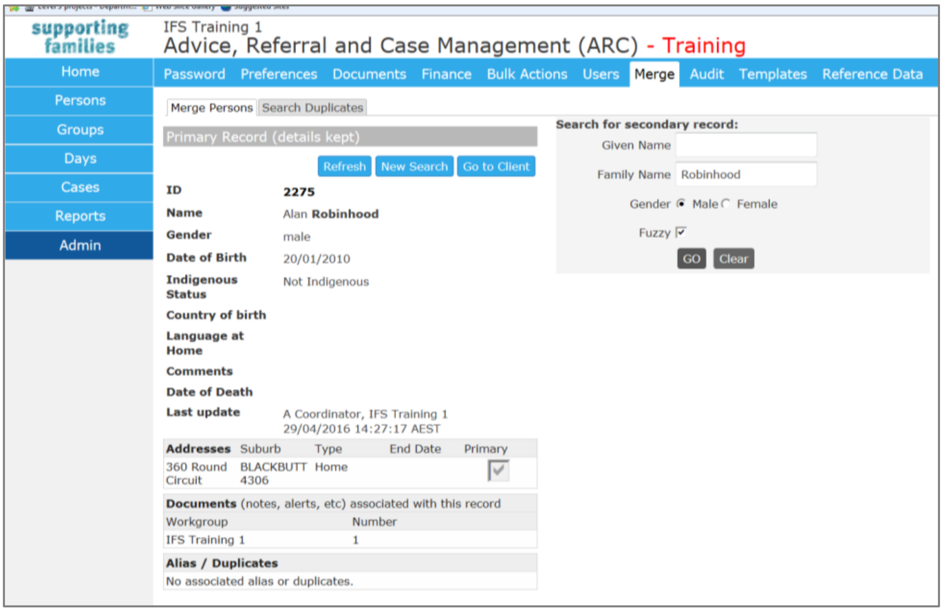
   Note: You can obtain the **Person ID** by holding the mouse over the client's name in the Person **Details** tab (see image below). The first number is the Person ID, the second number (if different) is the alias record ID. In the example below, the **Person ID** is '2275' and the **Alias ID** is '2275'.

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.



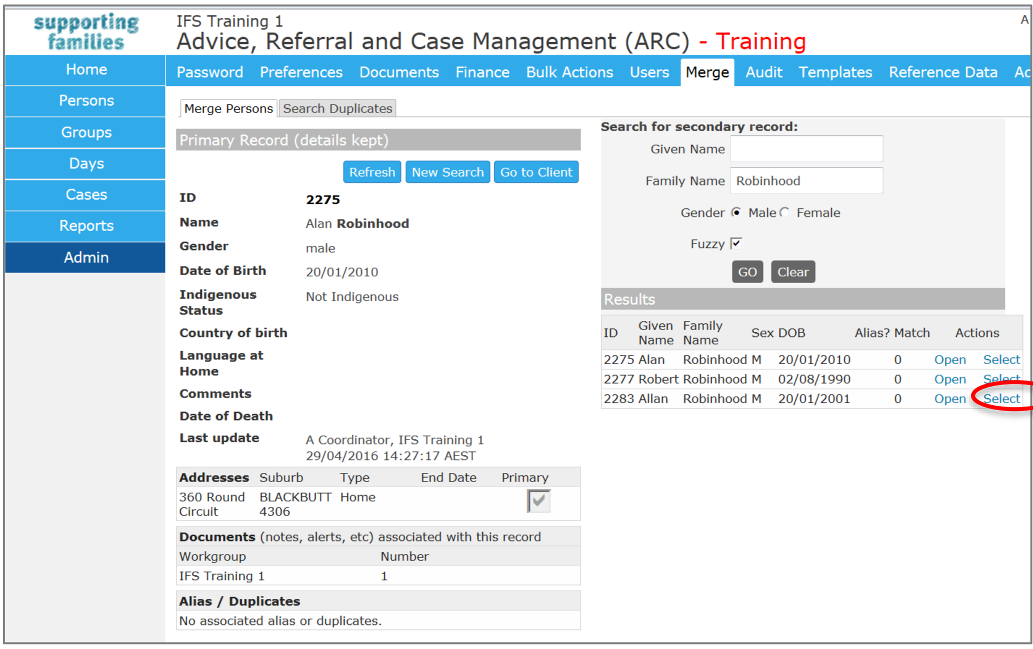
When you have finished reviewing the record close the tab and return to the **Merge** tab.

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.

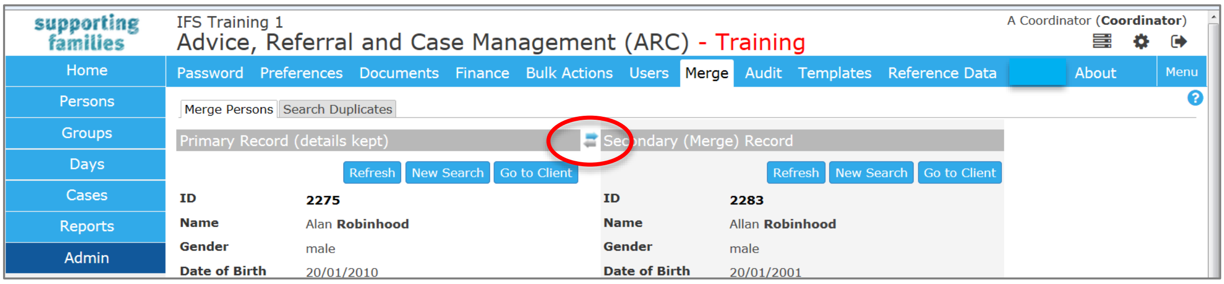
5. In the ***Search for secondary record*** form, enter the **Given Name** and/or **Family Name** of the secondary person record. These fields will have been defaulted from the search criteria entered in the primary search criteria. It is also recommended to click the **Fuzzy** search check box to display 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.



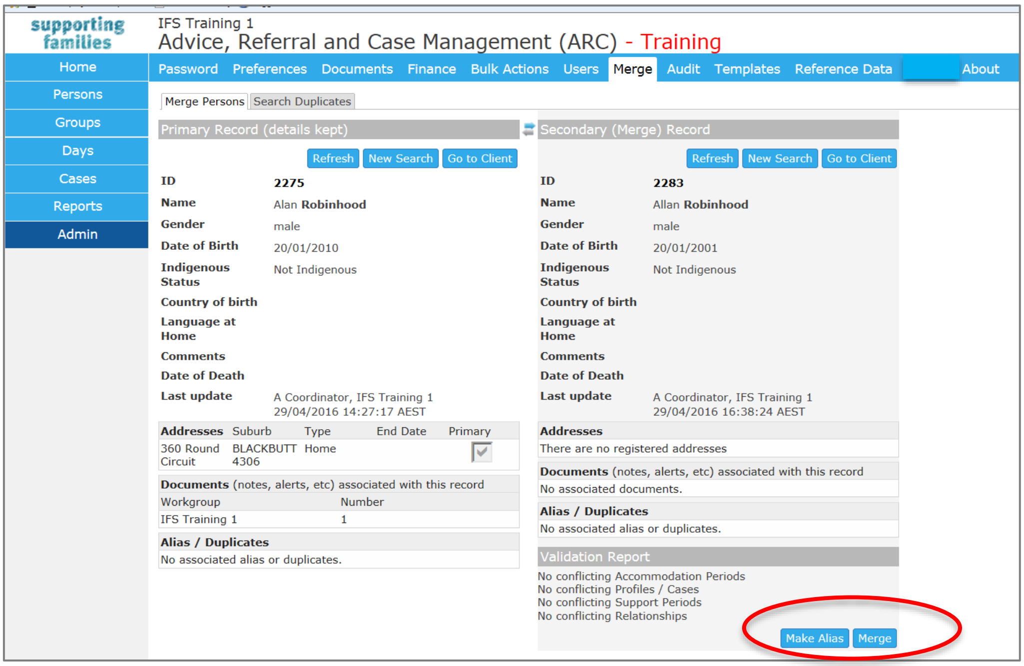
If you need to modify any details on the secondary person record, you can click the **Go to Client** button to open the client's Person Details tab in another browser tab. Once you have saved any changes in the Person Details tab, switch back to the current Merge process and click the **Refresh** button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

8. Carefully consider both records to ensure they relate to the same client.
<u>**Note**</u>: in addition to merging the records, clicking **Make Alias** will also create an Alias record from the name and gender details of the secondary person record. For example, the **Make Alias** function would be used if you were merging two records where the person is known under different names (hence the accidental creation of a duplicate record for the person).

9. If you decide that you want to keep the Secondary person record and merge the Primary person record, you can swap the two records by clicking on the arrow icon between the Primary and Secondary forms.(See image below)

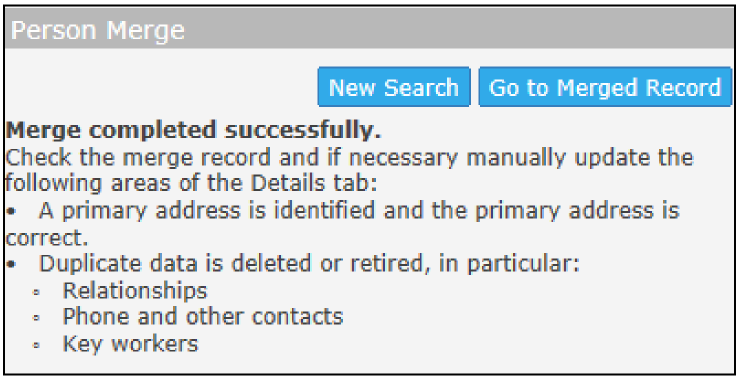


10. Click **Merge** to merge the secondary person record into the primary person record. (Please note that if the **Merge** button is not available, this will most likely be due to conflicting support period or profiles between the selected primary and secondary person records.)



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.

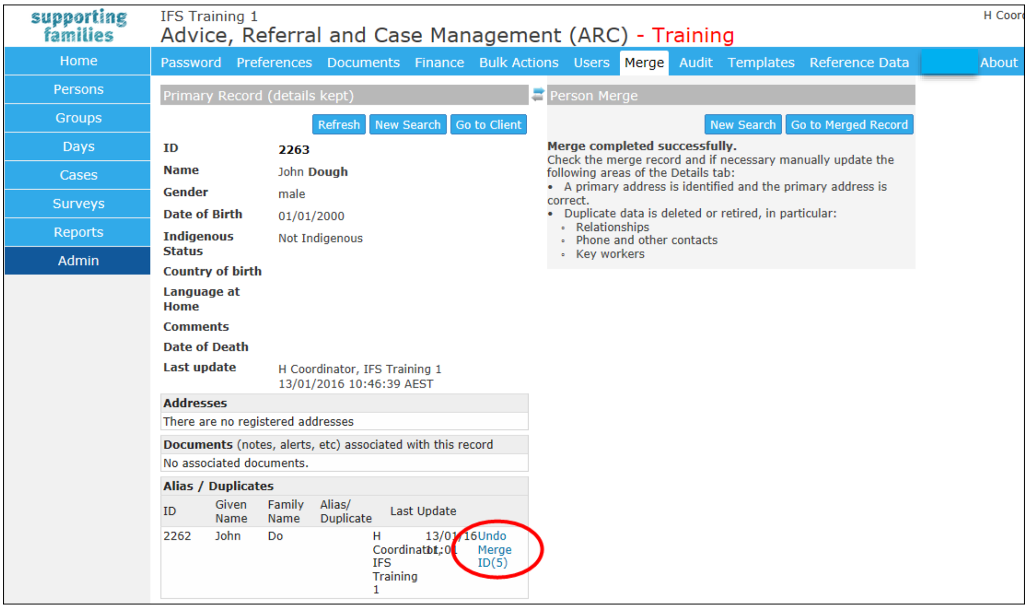


13. Be sure to go to the Merged record to ensure all the information is displaying as expected.

19.2.3 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.



19.2.4 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.

19.3 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

19.4 Templates

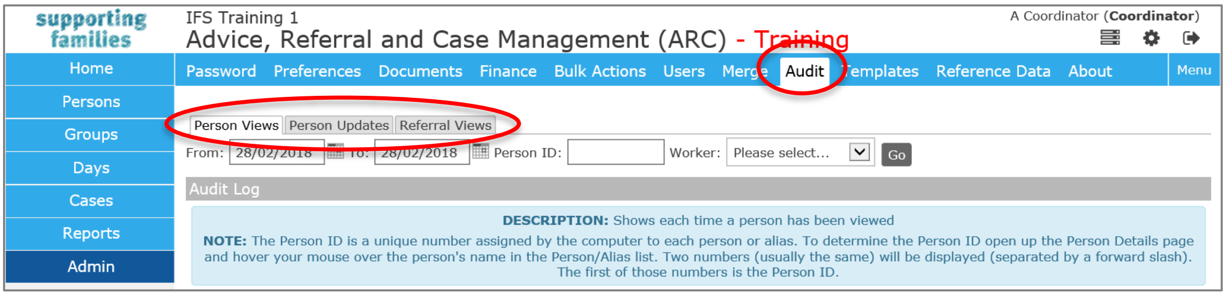
This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon to access SRS Help or review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides

19.5 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.

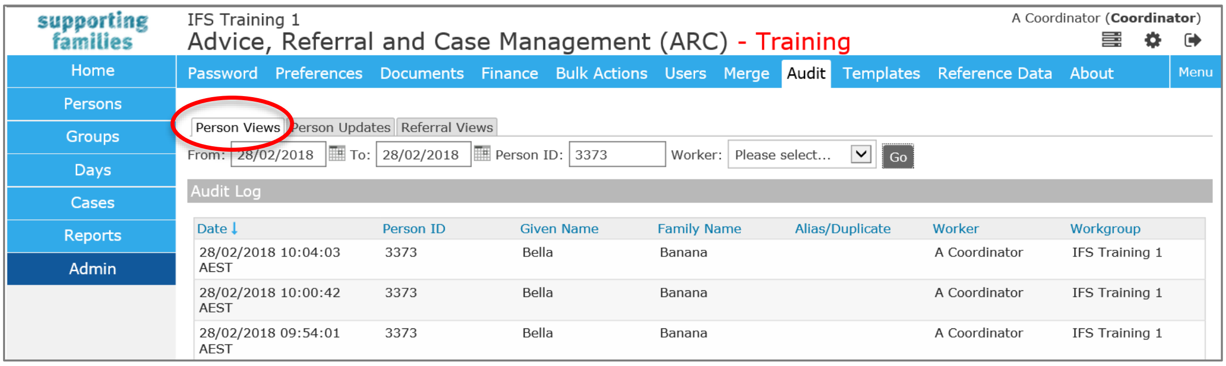
19.6 Audit

This is standard functionality from the Infoxchange SRS product.

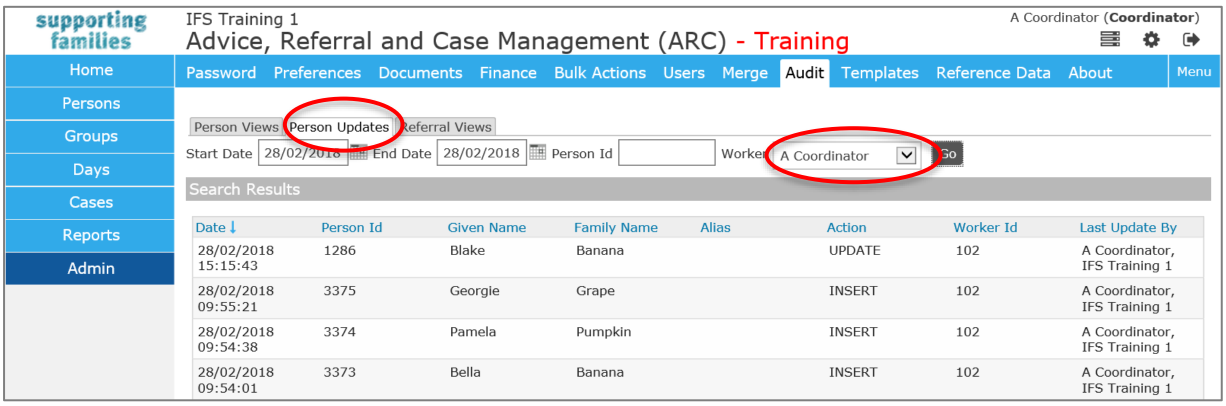


The **Audit** tab on the **Admin** page enables you to:

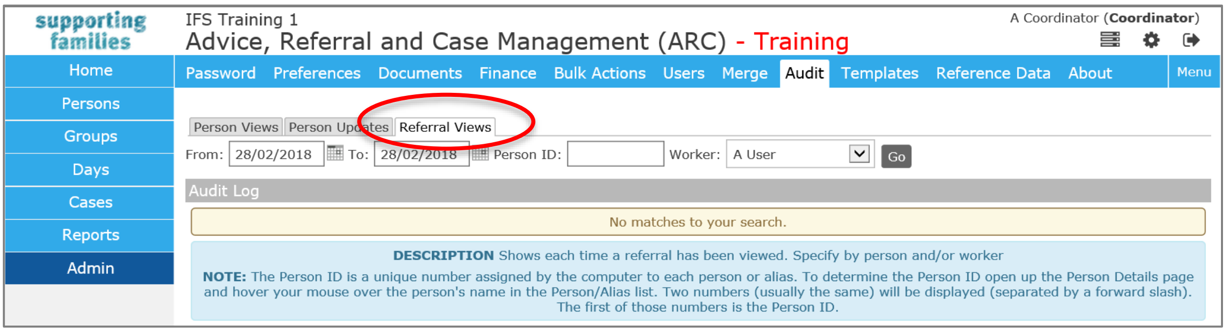
1. See users who have accessed a specific **Person** record.
   On the **Person Views** sub-tab, enter the **Person ID** with the relevant date range and click **Go**. You can select a specific worker or leave at Please select to see all users who have viewed that specific Person record.



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



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.

19.7 Reference Data

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

19.8 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.

20 ARC Support

20.1 How do I….?

This **User Manual** has been prepared to assist you with getting to know the functionality available within ARC for Intensive Family Support services.

Refer to this helpful document as your first point of reference for assistance.

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

20.2 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.

20.3 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 User Manual offer assistance for the particular functionality within ARC.

20.4 Practice Support

This manual provides the user with information on how to access and use the Advice, Referrals and Case Management (ARC) system for Intensive Family Support.

For matters of practice, please refer to the information available at the secure site: FaCC and IFS Service Provider Secure Area (familychildconnect.org.au)

Or email your query to childandfamilycommissioning@dcssds.qld.gov.au