



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.

Copyright © 2024

No part of this content may be copied, transmitted or used for any other purpose without the permission of Children and Families Program Team, Investment and Commissioning, Department of Child Safety, Seniors, and Disability Services

Table of Contents

- 1 About ARC 5**
 - 1.1 Logging into ARC 5
 - 1.2 Logging in for the first time 5
 - 1.3 Navigating ARC 6
 - 1.4 Viewing Prior Records 8
 - 1.5 Toggle for access to Person records 9
 - 1.6 Logging off 9
 - 1.7 Access to more than one workgroup 10
 - 1.8 Concurrent edit warning 10
 - 1.9 Forgotten password 11
- 2 Home Page 13**
 - 2.1 My List 13
 - 2.2 Team List 13
 - 2.3 My Actions 14
 - 2.4 Team Actions 14
 - 2.5 Service Directory 15
- 3 Enquiries 16**
 - 3.1 Create an Enquiry 16
 - 3.2 Create Person record from an Enquiry 19
 - 3.3 Locate an existing Enquiry 19
 - 3.4 Using the Enquiry List 20
- 4 Person Details 21**
 - 4.1 Searching for a Person 21
 - 4.2 Add a Person 22
 - 4.3 Create Alias 24
 - 4.4 Create Relationships 25
 - 4.5 Create Profile 27
 - 4.6 Record Address 28
 - 4.7 Create Phone & other contacts 31
 - 4.8 Assign Key Workers 32
- 5 Cases / Case Summary 34**
 - 5.1 Create a Case / Case Summary from Persons page 34
 - 5.2 Create Case / Case Summary from the Cases page 34
 - 5.3 Complete Case Summary details 35
 - 5.4 Close a Case / Case Summary 42
 - 5.5 Managing Cases from the Cases Page 46
 - a) Order by column 46

b)	Apply filters.....	47
c)	Create new Case Summary.....	48
d)	View associated records.....	49
6	Record Consent	51
7	Add Notes	53
8	Assessments.....	57
8.1	Record Assessments.....	57
8.2	FAST Assessment and Grid.....	57
8.3	Complete <i>SDM Safety Assessment</i>	63
9	Plans.....	64
9.1	Create Plan.....	64
9.2	Create new Goal within a Plan.....	65
9.3	Close a Goal within a Plan.....	67
9.4	Close Plan.....	67
9.5	Delete a Goal within a Plan.....	68
10	Support / Brokerage.....	69
10.1	Create Support / Brokerage Payment.....	69
10.2	Approve Support / Brokerage Payment.....	70
11	Tasks & Alerts	71
11.1	Create a Task.....	71
11.2	Create an Alert.....	74
12	Managing Referrals.....	75
12.1	Making Referrals to other services.....	75
12.1.1	Send a Referral to another service within ARC - Family Services.....	76
12.1.2	Record a Manual Referral.....	82
12.1.3	Record a Referral to a service listed in the Service Seeker database.....	87
12.1.4	Viewing Declined Referrals.....	89
12.2	Receiving Referrals.....	90
12.2.1	To decline a Referral.....	94
13	Managing Restricted Access	96
13.1	Apply Restricted Access.....	96
13.2	Remove Restricted Access.....	98
13.3	Restricted Access Audit Log.....	99
14	Managing Groups.....	100
14.1	Adding a New Group.....	100
14.2	Add a Person to a Group.....	104
14.2.1	Remove a Person from a Group.....	107
14.3	Record actions for the Group.....	108
14.4	Manage the number of participants in a Group.....	111

15	Days	112
	15.1 Navigating within the Days Page	112
	15.2 Creating a New record from a Tab on the Days Page.....	112
16	Documents	113
	16.1 To attach a Document to a Person record.....	113
	16.2 Viewing & Changing Documents	116
	16.2.1 To view the document.....	116
	16.2.2 To change the document:	116
	16.3 Merging Documents	117
	16.4 Deleting Documents.....	117
	16.5 Attaching Documents to other objects	118
17	Reports	119
	17.1 Reports.....	119
	17.1.1 Reports tab.....	119
	17.1.2 Lists tab.....	120
	17.1.3 Financial tab.....	120
	17.1.4 Referrals tab.....	121
	17.1.5 Custom tab.....	121
	17.2 Generating Reports.....	121
	17.3 Viewing Report Results.....	122
	17.4 Exporting Report Results	124
18	Admin Page	125
	18.1 Change Password.....	125
	18.2 User Preferences	125
	18.3 Documents	127
19	Coordinator Functions	128
	19.1 User Management.....	128
	19.1.1 Creating a New User.....	128
	19.1.2 Resetting a Password.....	132
	19.1.3 Unblocking a User Account	132
	19.1.4 Removing User Access.....	133
	19.2 Merging Person Records	135
	19.2.1 To Search for duplicate records.....	135
	19.2.2 To Merge two Person records	136
	19.2.3 Reinstating Merged Records (Undo Merge).....	140
	19.2.4 Deleting an Alias Record	140
	19.3 Bulk Actions.....	140
	19.4 Templates.....	140
	19.5 Finance.....	141
	19.6 Audit	141

19.7 Reference Data	142
19.8 About	142
20 ARC Support.....	143
20.1 How do I....?.....	143
20.2 Technical Support	143
20.3 Online Help.....	143
20.4 Practice Support.....	143

1 About ARC

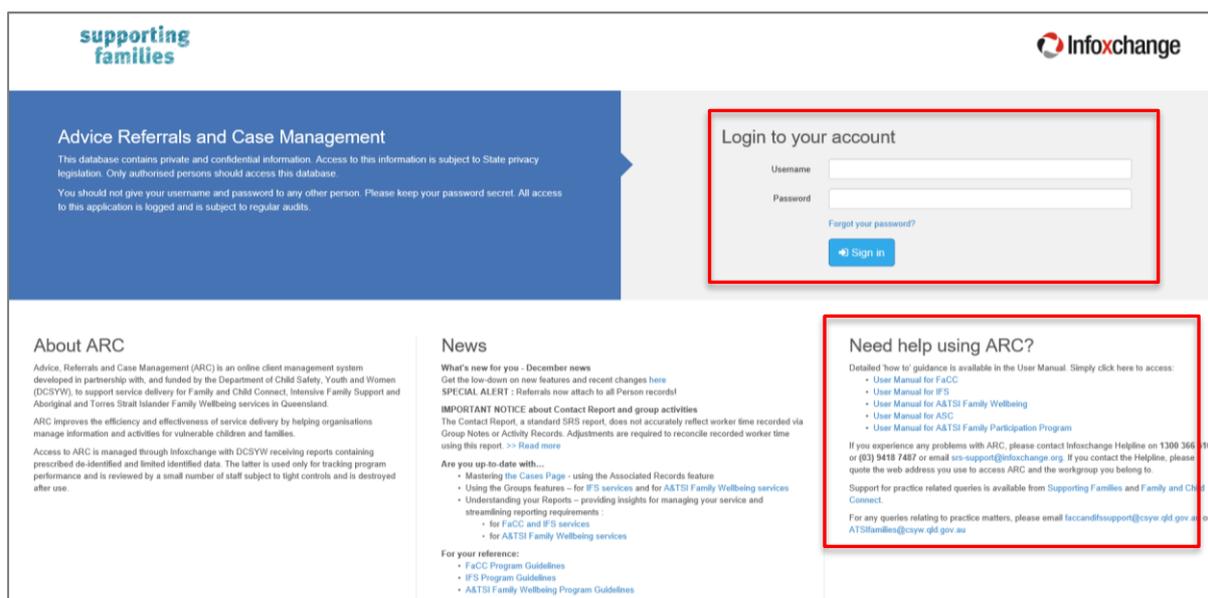
Advice, Referrals and Case Management (ARC) is the system developed for Intensive Family Support services to manage information and advice, referrals, assessments, case management and reporting. ARC integrates tools and performance reporting to streamline the capture of reliable data for evaluating the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

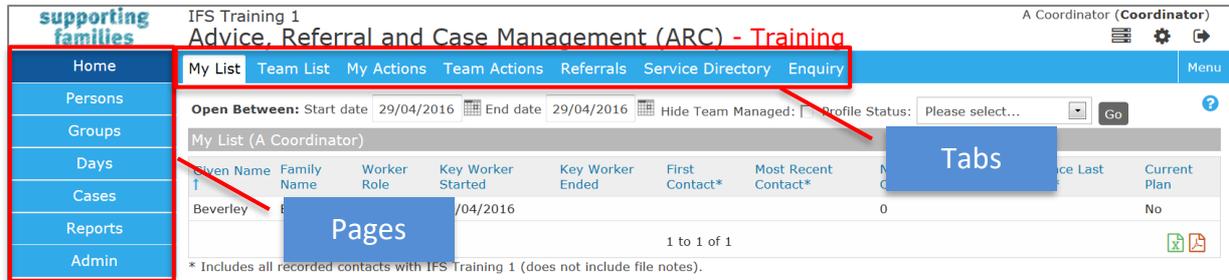
When you log in for the first time, you may be asked to change your password. We recommend that you change your password to something easy to remember.

- 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:

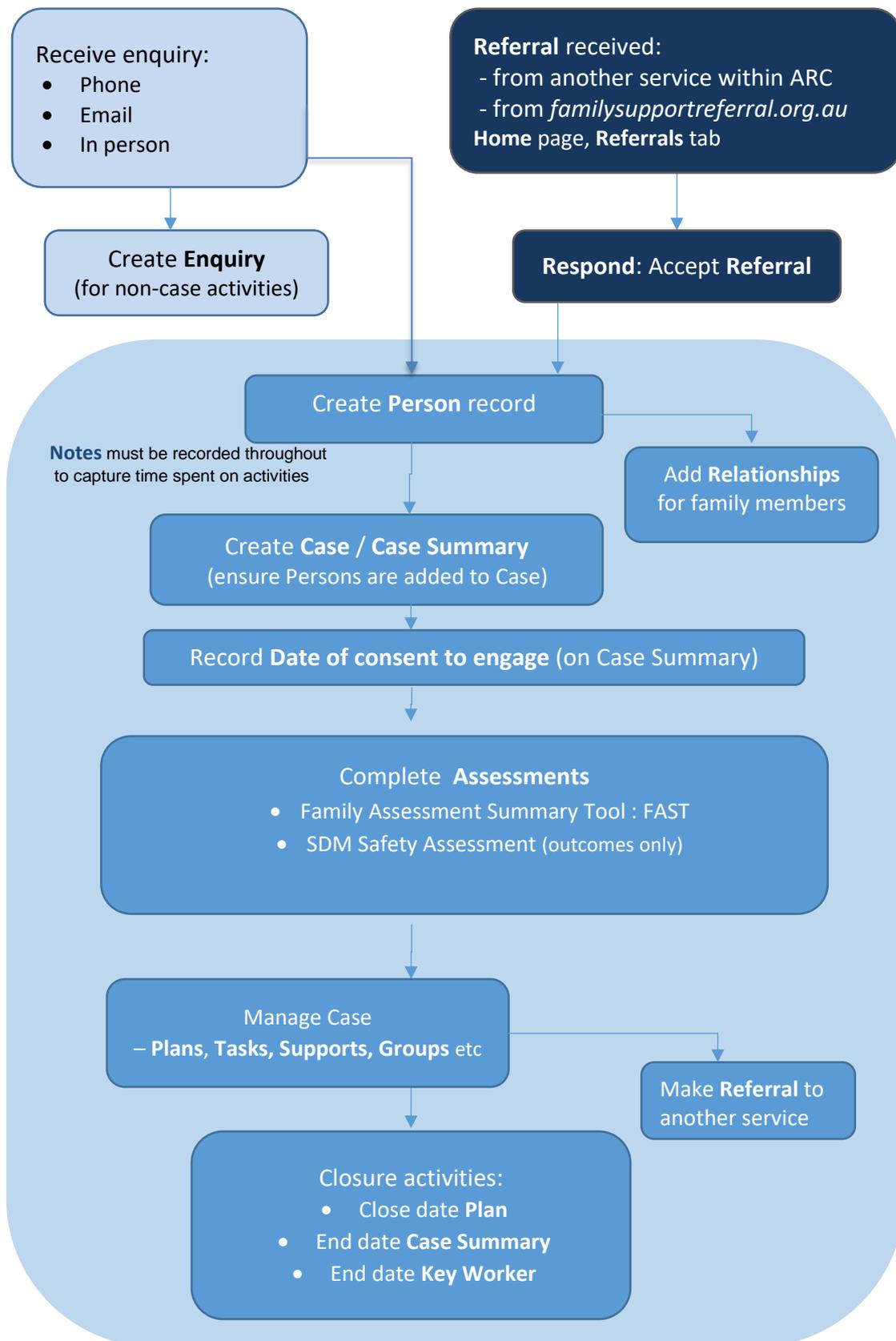
- Pages – 7 options on the left-hand side
- Tabs – appear across the top for each Page
- Workspace area – the central area.

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

supporting families IFS Training 1
 Beverley Banana Female, DOB: 14/07/2004 (Age 11 yrs)

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

Persons Beverley Banana Primary Name

Groups Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Briana Banana	Mother	30/10/1985	
Byron Banana	Brother	07/07/2007	

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

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

Description	Role	Workgroup	Start	Last Update
Case Summary Banana Family - II	Referred Child	IFS Training 1	15/03/2016	29/04/2016

Address: [Create new address](#)
 No address exists

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

Screenshot 2

supporting families IFS Training 1
 Beverley Banana Female, DOB: 14/07/2004 (Age 11 yrs)

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

Persons Beverley Banana Primary Name

Groups Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Briana Banana	Mother	30/10/1985	
Byron Banana	Brother	07/07/2007	

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

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

Description	Role	Workgroup	Start	Last Update
Case Summary Banana Family - II	Referred Child	IFS Training 1	15/03/2016	29/04/2016
Prior Case				
Description	Role	Workgroup	Start	End
Case Summary Banana Family	Referred Child	IFS Training 1	11/01/2016	17/02/2016

Address: [Create new address](#)
 No address exists

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

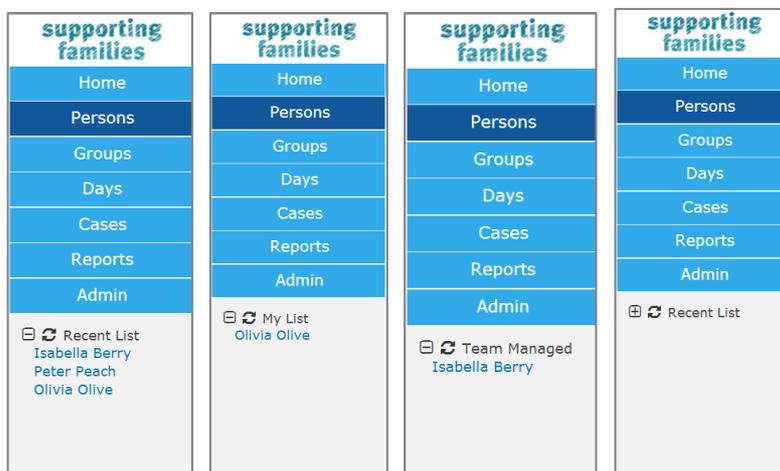
1.5 Toggle for access to Person records

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.

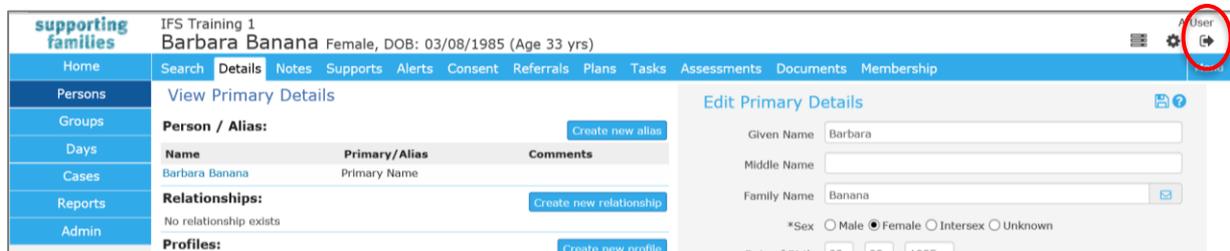
Simply ...

- 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

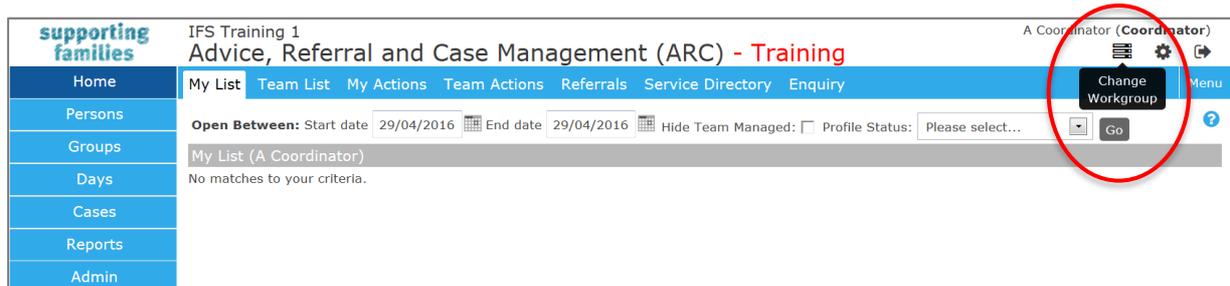
Log off via the log out icon  on the top at the far right of the screen. Simply click to log out. Users should log out as soon as they have completed their work within ARC.



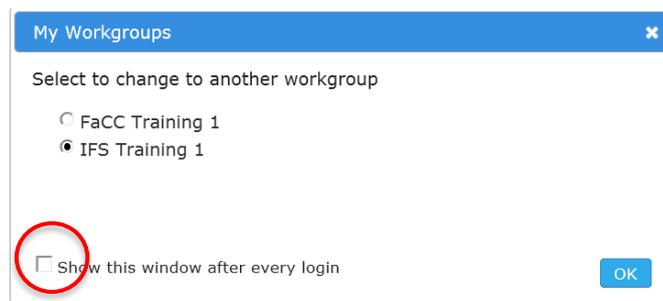
1.7 Access to more than one workgroup

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.



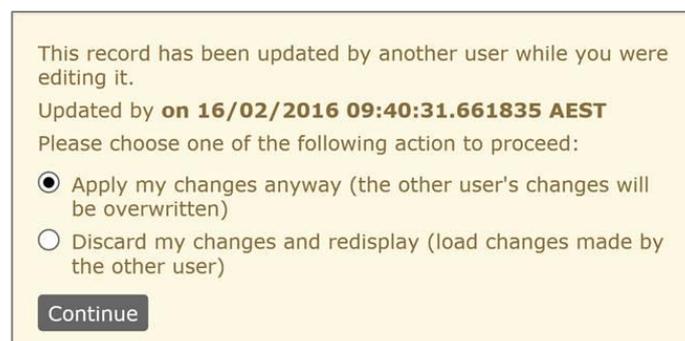
The workgroup options you have available will display. Simply select the radio button for the required workgroup and click OK.



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:



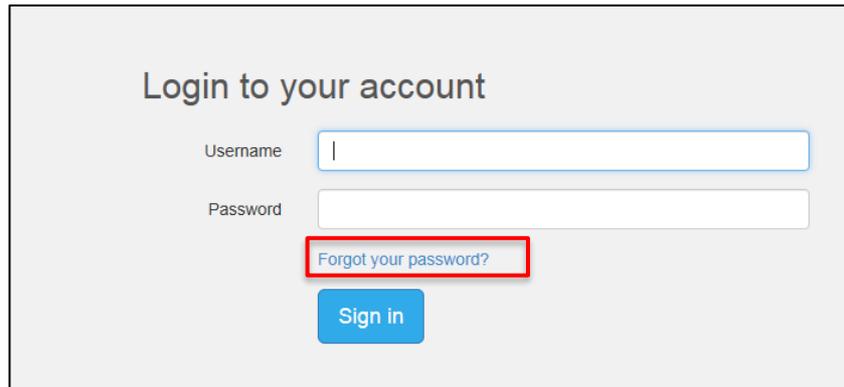
Select the required option and **Continue**.

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.

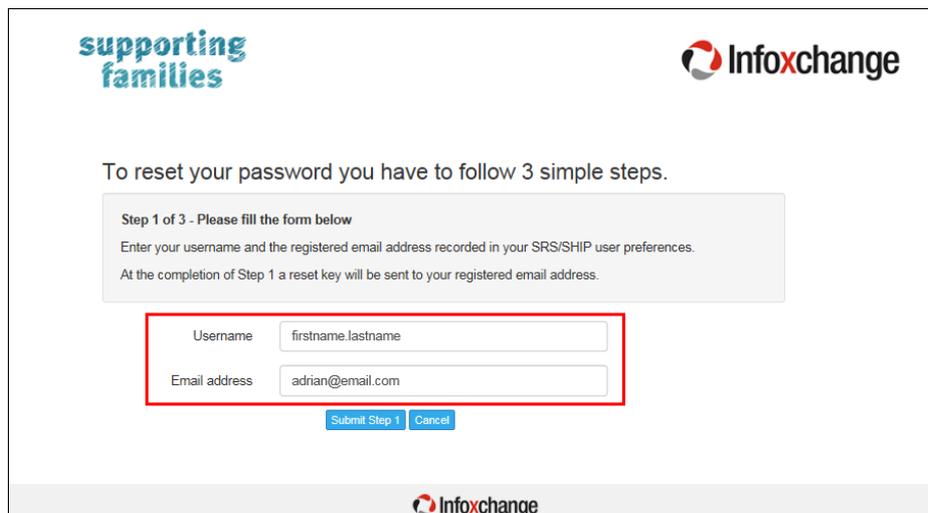
If you haven't set up your User Preferences, you will need to contact an ARC Coordinator within your service or call the Infoxchange Support Team to reset your password.

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



The screenshot shows a login form titled "Login to your account". It contains two input fields: "Username" and "Password". Below the "Password" field is a link labeled "Forgot your password?" which is highlighted with a red rectangular box. Below the link is a blue "Sign in" button.

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



The screenshot shows the "supporting families" logo on the left and the "Infoxchange" logo on the right. Below the logos, it says "To reset your password you have to follow 3 simple steps." A grey box contains the text: "Step 1 of 3 - Please fill the form below", "Enter your username and the registered email address recorded in your SRS/SHIP user preferences.", and "At the completion of Step 1 a reset key will be sent to your registered email address." Below this is a form with two input fields: "Username" with the placeholder "firstname.lastname" and "Email address" with the placeholder "adrian@email.com". Both fields are highlighted with a red rectangular box. Below the fields are two buttons: "Submit Step 1" and "Cancel". The "Infoxchange" logo is at the bottom center.

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

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

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

Step 2 of 3 - Please fill the form below

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

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

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

Reset Key

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

Security Response

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

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

Note: Your password must:

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

Select **Submit Step 3**

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

Step 3 of 3 - Enter your new password

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

Passwords need to comply with the following rules:

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

New password

Confirm password

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

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

supporting families 

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

Your password was changed successfully!!

[Login page](#)

2 Home Page

2.1 My List

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

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

From the **Home** page, select the **My List** tab:

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

Home **My List** Team List My Actions Team Actions Referrals Service Directory Enquiry Menu

Persons Open Between: Start date 29/04/2016 End date 29/04/2016 Hide Team Managed: Profile Status: Please select... Go

Groups My List (A Coordinator)

Given Name	Family Name	Worker Role	Key Worker Started	Key Worker Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan
Beverley	Banana		29/04/2016				0		No

1 to 1 of 1

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

The following options can be used to customise your view:

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

2.2 Team List

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

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

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

Home My List **Team List** My Actions Team Actions Referrals Service Directory Enquiry Menu

Persons Open Between 29/04/2016 and 29/04/2016 Key Worker Please select Show Last worker Alerts Profile Status Please select... Go

Groups My Team List (IFS Training 1)

Key Worker	Given Name	Family Name	Worker Role	Key Worker Started	Key Worker Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan
A Coordinator	Beverley	Banana		29/04/2016				0		No
K User	Peter	Potato		29/04/2016				0		No

The following options can be used to customise your view:

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

2.3 My Actions

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

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

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

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

Home My List Team List **My Actions** Team Actions Referrals Service Directory Enquiry Menu

Persons Due Date Between: Start date 04/03/2016 End date 27/05/2016 Go Calendar View ?

Groups My Tasks

Due Date 1	Time	Action Type	Workgroup	Person	Description	Details
10/05/2016	10:00 AM	Task	IFS Training 1	Beverley Banana Briana Banana	For review of Actions and identify any new issues	Go to Task

1 to 1 of 1

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

The following options can be used to customise your view:

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

2.4 Team Actions

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

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

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

Home My List Team List My Actions **Team Actions** Referrals Service Directory Enquiry Menu

Persons Due Date Between: Start date 04/03/2016 End date 27/05/2016 Go Calendar View ?

Groups My Team Tasks

Due Date 1	Time	Action Type	Worker	Person	Description	Details
10/05/2016	10:00 AM	Task	A Coordinator	Beverley Banana Briana Banana	For review of Actions and identify any new issues	Go to Task
29/04/2016		Task	N User	Peter Potato		Go to Task

1 to 2 of 2

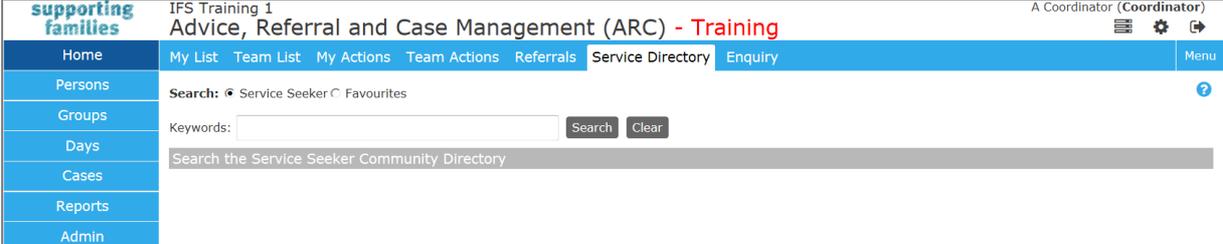
The same features for navigating and customising **My Actions** can be applied to this tab.

2.5 Service Directory

The **Service Directory** tab provides access to search the SRS Service Seeker Database, a product maintained by Infoexchange, 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 Infoexchange Help Desk.

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



The screenshot shows the 'supporting families' web application interface. The top navigation bar includes 'Home', 'My List', 'Team List', 'My Actions', 'Team Actions', 'Referrals', 'Service Directory', and 'Enquiry'. The 'Service Directory' tab is active. Below the navigation bar, there is a search section with a 'Search:' label, a radio button for 'Service Seeker', and a 'Favourites' option. A 'Keywords:' input field is present, followed by 'Search' and 'Clear' buttons. Below the input field, there is a placeholder text: 'Search the Service Seeker Community Directory'. The left sidebar contains a menu with options: Home, Persons, Groups, Days, Cases, Reports, and Admin.

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.

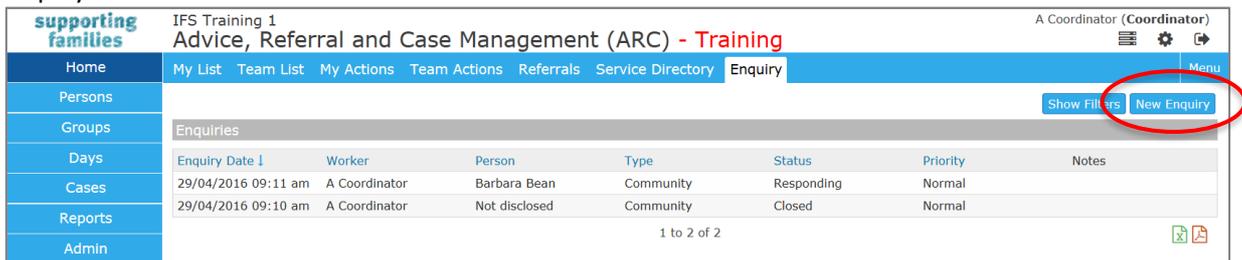
3 Enquiries

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.

The screenshot shows the 'New enquiry details' form. The form is titled 'New enquiry details' and has a time and date of 8:38 am Wed 19/06/2019. The worker is 'Worker Two'. The channel is 'Phone'. The enquirer is 'Self'. The enquiry is about 'Other' and is from 'Community'. The name is 'given name' and the family name is blank. There is an 'Add person' button. The status is 'Pending'. The suburb of family is blank. The form has several mandatory fields marked with an asterisk (*): 'Do any Persons identify as indigenous' (Yes/No), 'Referred from' (dropdown), 'Consent given for referral in Presenting Concerns' (checkboxes for various concerns), 'Priority' (dropdown), and 'Response type' (dropdown). The form also has a 'Total time (in minutes)' field and a 'Last Updated' field. A 'Save' button is at the bottom.

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.

Note: 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 not currently available from Infoxchange to enable Enquiry records for a Person to be identified from their Person record.

The screenshot shows a web form titled "New enquiry details". At the top, it displays "Time and Date 2:37 pm Mon 01/08/2016" and "Worker B Coordinator" with a pencil icon. Below this, there are radio buttons for "Channel": Phone (selected), Email, In person, Fax, and Web Form. The "Enquirer" section has a dropdown menu, radio buttons for "Enquiry about" (Self, Other), and radio buttons for "Enquiry From" (Community, Professional). There are input fields for "Name" (Name not given) and "Family name". The "Associated person" section has input fields for "Name" (Person (first name)) and "of Concern (surname)". A blue "Add Person" button is located at the bottom right of the form, circled in red.

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

A list of response types for an enquiry, displayed in a blue-bordered box. The items are:

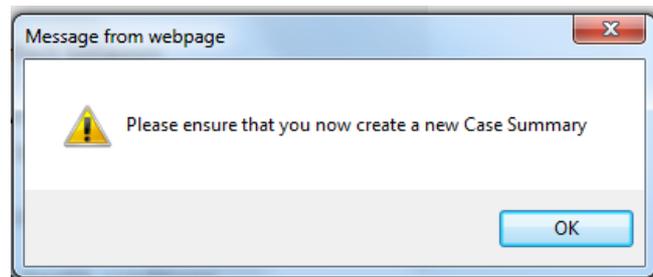
- 1 - Information, resources, advice
- 2 - Specialist support service recommended
- 3 - Supported Referral
- 4 - Active engagement
- Incomplete/Inappropriate Enquiry
- Reported to Child Safety - Significant risk of harm
- Already working with Child Safety
- Not Applicable

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:



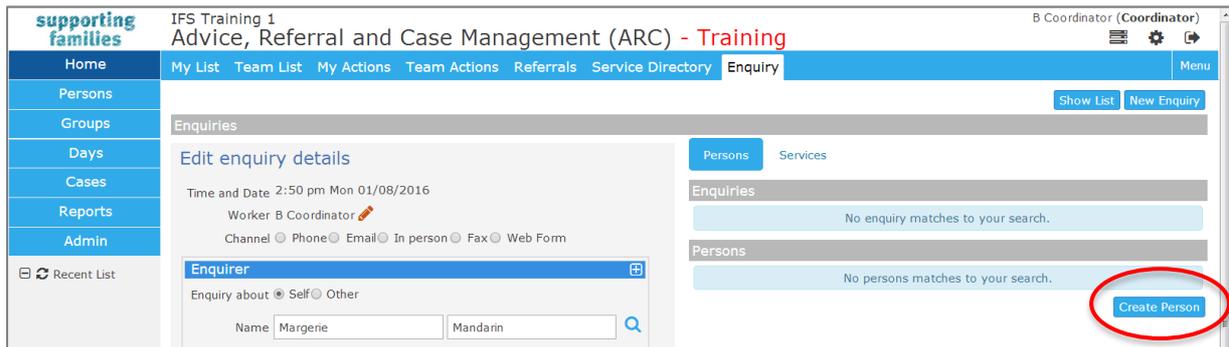
Additional Notes:

- 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

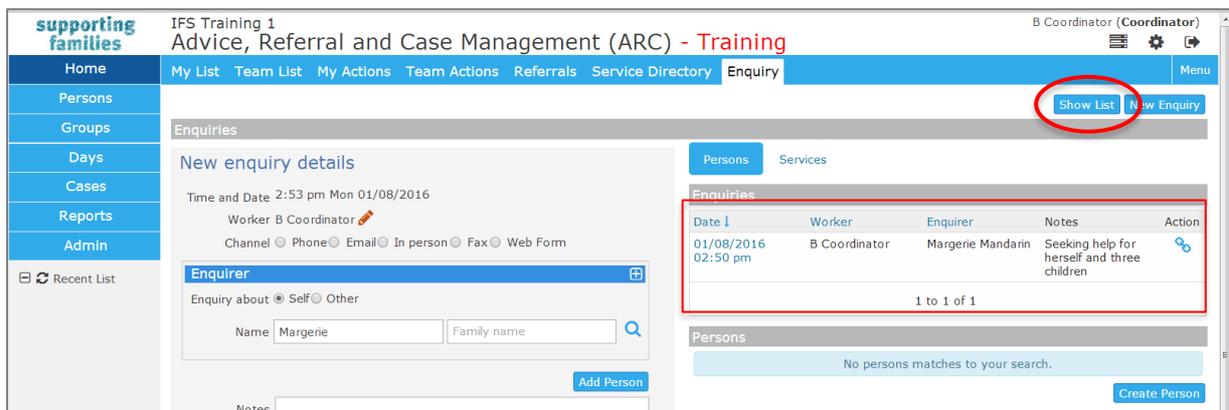
1. To create a new Person record from an **Enquiry**, enter the person's name in either the **Enquirer** section (for self-referral) or in the **Associated Person** section and select the  icon.
2. If there is no record displayed, select **Create Person** on the right hand side of the screen. This will 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.



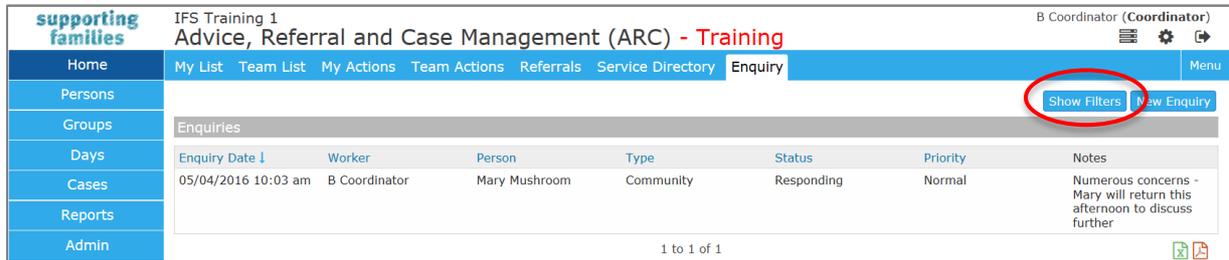
3.3 Locate an existing Enquiry

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.

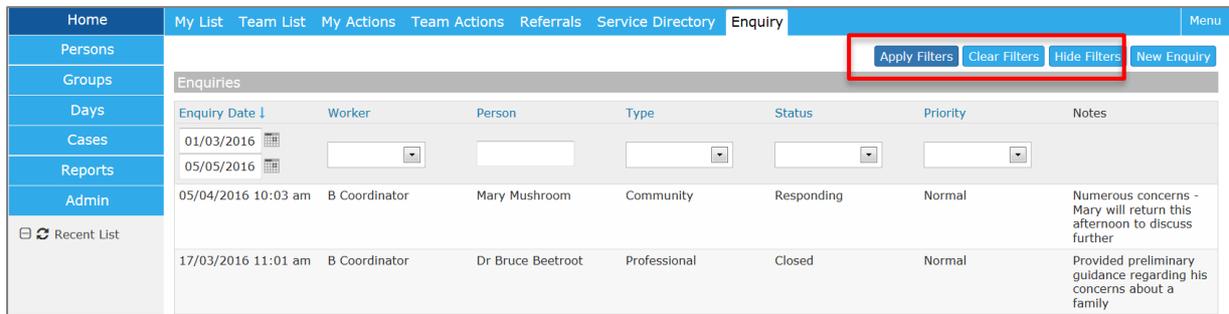


3.4 Using the Enquiry List

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.

The screenshot displays the 'supporting families' IFS Training 1 interface. The main header shows 'Advice, Referral and Case Management (ARC) - Training' and the user role 'A Coordinator (Coordinator)'. A navigation menu on the left includes 'Home', 'Persons', 'Groups', 'Days', 'Reports', and 'Admin'. The 'Persons' section is active, showing a 'Search' tab and a 'Search By:' dropdown menu with options: Name (selected), Identifier, Address, Phone, and DOB. Below this are input fields for 'Given name' and 'Family name', along with radio buttons for 'Male', 'Female', and 'Intersex', and a checked 'Fuzzy' checkbox. 'Search' and 'Clear' buttons are also present. A 'Recent List' on the left shows 'Beverley Banana' and 'Peter Potato'. At the bottom left, a 'Family name search' box with a 'GO' button is highlighted.

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**.

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

Home Search

Persons Search By: Name Identifier Address Phone DOB

Groups Given name Family name Male Female Intersex Unknown Fuzziness

Days

Cases Search Results

Reports No matches to your search.

Admin **Add new Person**

Recent List
Beverley Banana
Peter Potato

Tip: If you are not sure about the spelling try using the % symbol as a wildcard. For example, johns% would return both johnstone and johnson.

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.

Add New Person

Given Name

Middle Name

Family Name

*Gender Male Female Gender diverse/other Unknown

Date of Birth

year estimated

*Identifies as Aboriginal Torres Strait Islander Both Neither Unknown Unspecified

Identifies as Australian South Sea Islander

Country of birth

Preferred Language

Culturally and Linguistically Diverse

Comments

Primary diagnosed disability

Secondary diagnosed disability

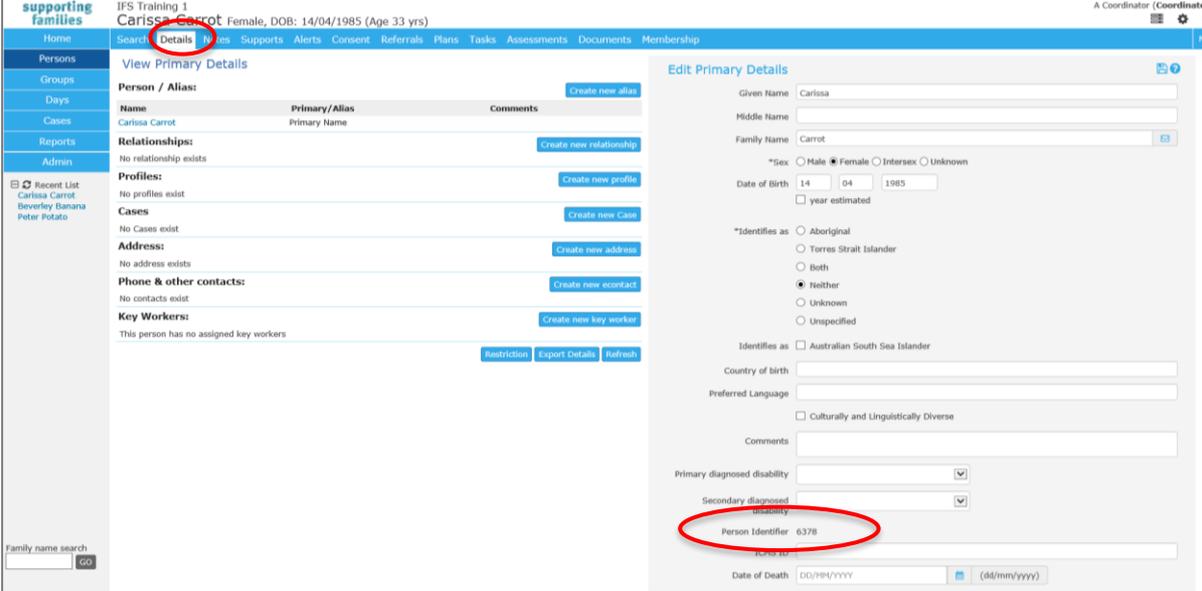
Person Identifier

ICMS ID

Date of Death

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.



The screenshot shows the 'supporting families' interface for a user named Carissa Carrot. The 'Details' tab is selected. On the right, the 'Edit Primary Details' form is visible. The 'Person Identifier' field, which contains the value '6378', is circled in red. Other fields include Given Name (Carissa), Middle Name, Family Name (Carrot), Date of Birth (14/04/1985), Sex (Female), and various identification options.

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.



This screenshot shows the 'Details' tab for Carissa Carrot. A tooltip is displayed over the name 'Carissa Carrot', showing 'ID:6378/6378'. The tooltip and the ID number are circled in red. The main view shows the 'Person / Alias' section with the name 'Carissa Carrot' and the 'Primary Name' field.

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

4.3 Create Alias

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

The screenshot shows the 'supporting families' interface for a user named Carissa Carrot. The 'Details' tab is active, and the 'Create new alias' button is highlighted with a red circle. The 'Add New Alias' form on the right includes fields for Given Name, Middle Name, Family Name, Preferred Name, Date of Birth, Sex, and Comments. The 'Save' button is at the bottom of the form.

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

The screenshot shows the 'supporting families' interface for the same user, Carissa Carrot. The 'Edit Alias Details' form is now displayed on the right side of the page. The 'Given Name' field contains the text 'Princess'. The 'Preferred Name' checkbox is checked. The 'Save' button is at the bottom of the form.

4.4 Create Relationships

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

The screenshot shows the 'supporting families' interface for a user named Carissa Carrot. The 'Details' tab is active. On the right side, there is a 'Search for related person' form with fields for 'Given name' and 'Family name', and radio buttons for 'Sex' (Male, Female, Intersex, Unknown) and a 'Fuzzy' checkbox. Below the search form is a 'Results' section. In the main content area, the 'Relationships' section has a 'Create new relationship' button circled in red. Other sections include 'Person / Alias', 'Profiles', 'Cases', 'Address', 'Phone & other contacts', and 'Key Workers'.

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

This screenshot is similar to the previous one, but the search results are empty. The 'Search for related person' form now contains 'Ch%' in the 'Given name' field and 'Car%' in the 'Family name' field. The 'Results' section displays 'No match to your search.' and a tip: 'Tip: If you are not sure about the spelling try using the % symbol as a wildcard. For example, johns% would return both Johnstone and Johnson.' The 'Add new person' button in the 'Relationships' section is circled in red.

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

The screenshot shows the 'Edit Relationship' form. The 'Related person' dropdown is set to 'Charles Carrot'. The 'Start Date' is '25/01/2019' and the 'End Date' is 'dd/mm/yyyy'. There is a 'Comments' text area and a 'Last update' field. A 'Save' button is at the bottom right. The 'Edit Relationship' title is circled in red.

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

Note: the start date for a relationship 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.

- 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.

IFS Training 1
Charles Carrot Male, DOB: 09/10/1982 (Age 36 yrs)

Home Search **Details** Notes Supports Alerts Consent Referrals Plans Task

Persons View Primary Details

Groups

Days

Cases

Reports

Admin

Recent List
 Charles Carrot
 Carissa Carrot

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

Name	Primary/Alias	Comments
Charles Carrot	Primary Name	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Carissa Carrot	Wife	14/04/1985	

Profiles: [Create new profile](#)

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.

IFS Training 1
Carissa Carrot Female, DOB: 14/04/1985 (Age 33 yrs)

Home Search **Details** Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents Membership

Persons View Primary Details

Groups

Days

Cases

Reports

Admin

Recent List
 Carissa Carrot
 Charles Carrot
 Beverley Banana
 Peter Potato

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

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

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Charles Carrot	Husband	09/10/1982	

Profiles: [Create new profile](#)

No profiles exist

Cases: [Create new Case](#)

No Cases exist

Address: [Create new address](#)

No address exists

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

No contacts exist

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

This person has no assigned key workers

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

Family name search [GO](#)

Create new profile [Profile type](#)

- Child Profile
- Report to Child Safety

These records are not 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.

The screenshot shows the 'supporting families' interface for a user named Carissa Carrot. The main content area is titled 'View Primary Details' and contains several sections: 'Person / Alias', 'Relationships', 'Profiles', 'Cases', 'Address', 'Phone & other contacts', and 'Key Workers'. Each section has a corresponding 'Create new' button. The 'Address' section's 'Create new address' button is circled in red. To the right, the 'New Address Details' form is visible, with fields for Street, Suburb, State (QLD), Postcode, and Country (Australia). There are also checkboxes for 'Safety Issues', 'Primary Address?', and 'Current Address?'. At the bottom right, there is a table for 'Others who live at this address(tick):' with columns for Person, Relationship, Current, Address, and Primary Address.

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

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.

The screenshot shows the 'supporting families' interface for a person named Carissa Carrot. The 'Edit Contact Details' form is open on the right side of the screen. The 'Phone & other contacts' section is highlighted with a red circle, and the 'Create new econtact' button is also circled in red. The form includes fields for Contact, Contact type, Safety Issues, Comments, Start Date, End Date, and Current econtact? (Yes/No). The 'Save' button is visible at the bottom of the form.

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

1. Select **Create new key worker**. The **Edit Key Worker** form will appear on the right of screen.
2. Select the **Key Worker** from the drop down list. To record a key worker external to your service, select 'Other, please specify:' from 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**.

The screenshot shows the 'Edit Key Worker' form for Carissa Carrot. The form includes the following fields and sections:

- Key Worker:** Other, please specify: (dropdown)
- Name:** Zara Zucchini
- Workgroup:** Relationships Matter In
- Role:** Family counsellor
- Comments:** 4512 3214
- May be viewed by:** Workgroup Cluster
- Start Date:** 25/01/2019
- End Date:** (calendar icon)
- Current Key Worker?:** Yes No
- Last update:** A Coordinator 25/01/2019 13:30:18 AEST
- Buttons:** Save, Delete

The 'Key Workers' table at the bottom of the page is highlighted with a red box:

Worker	Workgroup	Role	Comments
H User	IFS Training 1	Support worker	
Zara Zucchini	Relationships Matter Inc.	Family counsellor	4512 3214

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

supporting families IFS Training 1
Carissa Carrot Female, DOB: 14/04/1985 (Age 33 yrs)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents Membership

View Primary Details Create new Case

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: No profiles exist. Create new profile

Cases: No Cases exist. **Create new Case**

Address: Create new address

Street	Locality	Type	Comments	Last Update
--------	----------	------	----------	-------------

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.

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

Home Case Summary

Persons Records 20 Show Filters **Create New Case Summary** Case Summary

Groups Case List

Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana	A Coordinator	Open	08/01/2019	09/01/2019		
Potato	A Coordinator	Open	20/12/2018	21/12/2018	28/12/2018	

* Description

Referral Presenting Concerns Closure

Original Referral
* Original Referral Source Please select...

This Referral
* Referral Date (for this service)

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 screenshot shows the 'Case Summary' form with the following fields and sections:

- Description**: A text input field with an asterisk (*) next to the label.
- Sub-tabs**: Three tabs labeled 'Referral', 'Presenting Concerns', and 'Closure'. A red box highlights these tabs.
- Original Referral**: A section header.
- Original Referral Source**: A dropdown menu with an asterisk (*) next to the label.
- This Referral**: A section header.
- Referral Date (for this service)**: A date input field with an asterisk (*) next to the label.
- Case Creation date**: A date input field with an asterisk (*) next to the label, containing the value '25/01/2019'.
- Is the referrer a prescribed entity?**: A radio button question with an asterisk (*) next to the label.
- Referral Source**: A dropdown menu with an asterisk (*) next to the label.
- Name of referring agency**: A text input field.
- Agency contact name**: A text input field.
- Agency contact details**: A text input field.
- Consent given for referral in**: A radio button question.
- Referrer has provided consent for their information to be provided to the client**: A radio button question.
- Other Referral Details**: A section header.
- Primary Household suburb**: A text input field.
- Postcode**: A text input field.
- Has a cultural consultation taken place**: A radio button question.
- If the mother is pregnant, and there are concerns for the unborn child, what is the due date?**: A date input field.
- Has the mother provided consent**: A radio button question.
- Service Response**: A section header.
- Case Worker**: A dropdown menu with the value 'A Coordinator'.
- Previous Family**: A radio button question.
- Date of consent to engage with the service**: A date input field.
- Documents**: A section with a yellow warning box that says 'Please save before attaching any documents.'
- Last update**: A timestamp field.
- Save**: A button at the bottom.

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.

This Referral

* Referral Date (for this service) 23/01/2019

* Case Creation date 25/01/2019

* Is the referrer a prescribed entity Yes No

* Referral Source

Prescribed entity

- Child Safety - Regional Intake Service (RIS)
- Child Safety Service Centre (CSSC)
- Corrective Services
- Disability Service
- Education - State School
- Education - Non-State School
- Health - CYMHS
- Health - Public Hospital
- Health - Private Hospital
- Health - General/Private Practitioner
- Health - Community Health
- Housing Service
- Police
- Police Referral Service

Specialist service providers

- Aboriginal and Torres Strait Islander - Family Wellbeing (ATSI-FW)
- Assessment and Service Connect (ASC)
- Family and Child Connect (FaCC)
- Intensive Family Support (IFS)

This Referral

* Referral Date (for this service) 11/06/2019

* Case Creation date 18/06/2019

* Is the referrer a prescribed entity Yes No

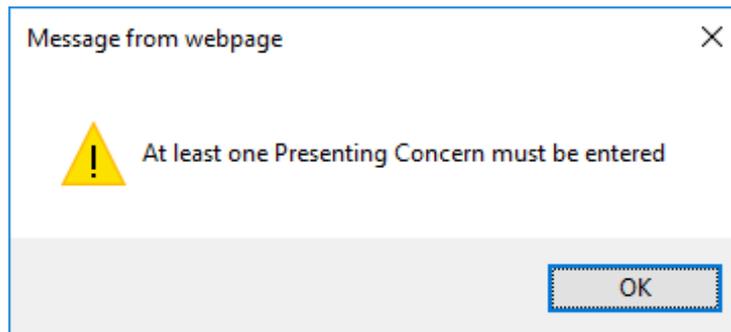
* Referral Source

- Community/Friend/Family
- Domestic & Family Violence Service
- Early Childhood Education and Care Professional
- Educational/Employment Service
- Elders
- Housing/Homelessness Service
- Mental Health Service
- Neighbourhood Centre
- Psychologist and Counsellor
- Self-Referral
- Sexual Assault/Abuse and Trauma Service
- Youth Service
- Other - Government
- Other - Non-Government

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

Note: 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.



Referral	Presenting Concerns	Closure
<input type="checkbox"/>	Child wellbeing	
<input type="checkbox"/>	Parenting Skills	
<input type="checkbox"/>	Domestic & Family Violence	
<input type="checkbox"/>	Household relationships including conflict between parent/s and child/ren	
<input type="checkbox"/>	Social and/or community support network	
<input type="checkbox"/>	Housing, food, clothing, budgeting or basic household resources	
<input type="checkbox"/>	Child Physical health including health conditions, disability	
<input type="checkbox"/>	Parent/Carer physical health including health conditions, disability	
<input type="checkbox"/>	Child mental or emotional health including anxiety, depression or self-harm	
<input type="checkbox"/>	Parent/Carer mental or emotional health including anxiety, depression or self-harm	
<input type="checkbox"/>	Child alcohol and/or drug misuse	
<input type="checkbox"/>	Parent/Carer Alcohol and/or drug misuse	
<input type="checkbox"/>	Child sexual abuse	
<input type="checkbox"/>	Family law / custody issues	
<input type="checkbox"/>	Other	

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.

This Referral

* Referral Date (for this service)

* Case Creation date

* Is the referrer a prescribed entity Yes No

* Referral Source

Name of referring agency

Agency contact name

Agency contact details

Consent given for referral in Yes No

Referrer has provided consent for their information to be provided to the client Yes No

Other Referral Details

Primary Household suburb

Postcode

Has a cultural consultation taken place Yes No Not applicable

If the mother is pregnant, and there are concerns for the unborn child, what is the due date?

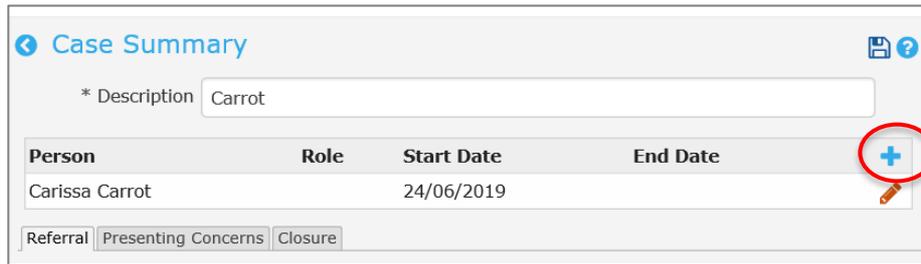
Has the mother provided consent Yes No

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



10. Select **Save**.

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



Case Summary

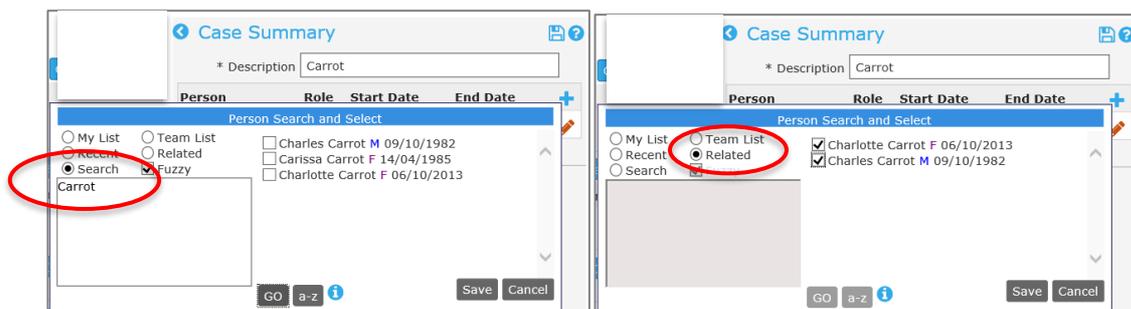
* Description Carrot

Person	Role	Start Date	End Date
Carissa Carrot		24/06/2019	

Referral Presenting Concerns Closure

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

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



Case Summary

* Description Carrot

Person Search and Select

My List Team List
 Recent Related
 Search Fuzzy

Carrot

GO a-z Save Cancel

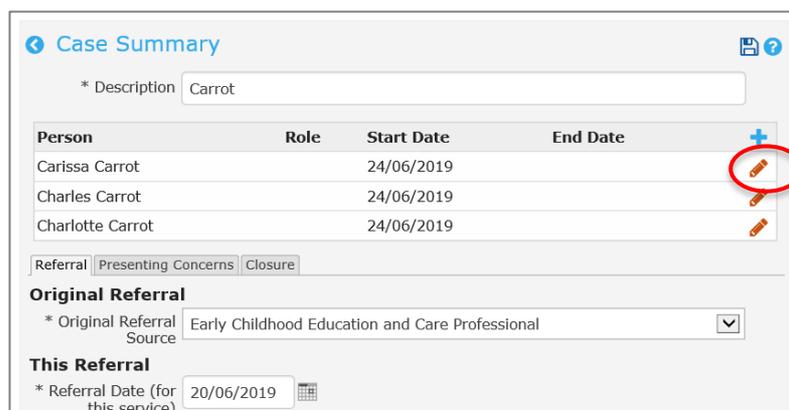
Charles Carrot M 09/10/1982
 Carissa Carrot F 14/04/1985
 Charlotte Carrot F 06/10/2013

Charlotte Carrot F 06/10/2013
 Charles Carrot M 09/10/1982

GO a-z Save Cancel

Click **Save**.

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



Case Summary

* Description Carrot

Person	Role	Start Date	End Date
Carissa Carrot		24/06/2019	
Charles Carrot		24/06/2019	
Charlotte Carrot		24/06/2019	

Referral Presenting Concerns Closure

Original Referral

* Original Referral Source Early Childhood Education and Care Professional

This Referral

* Referral Date (for this service) 20/06/2019

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

Person	Role	Start Date	End Date
Carissa Carrot	Primary Carer	24/06/2019	
Charles Carrot	Carer/parent	24/06/2019	
Charlotte Carrot	Referred Child	24/06/2019	

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

Firstly, 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 only 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.

Date of consent to engage with the service 25/01/2019

Documents [Select & Upload](#)

File Name	Uploaded
Family consent.docx	25/01/2019 14:29:09 AEST

Last update A Coordinator, IFS Training 1
25/01/2019 14:29:44 AEST

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



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.

Case Summary

* Description carrot

Person	Role	Start Date	End Date
Carissa Carrot	Primary Carer	18/06/2019	
Charles Carrot	Carer/parent	18/06/2019	
Charlotte Carrot	Referred Child	18/06/2019	

Referral **Presenting Concerns** Closure

- Child wellbeing
- Parenting Skills
- Domestic & Family Violence
- Household relationships including conflict between parent/s and child/ren
- Social and/or community support network
- Housing, food, clothing, budgeting or basic household resources
- Child Physical health including health conditions, disability
- Parent/Carer physical health including health conditions, disability
- Child mental or emotional health including anxiety, depression or self-harm
- Parent/Carer mental or emotional health including anxiety, depression or self-harm
- Child alcohol and/or drug misuse
- Parent/Carer Alcohol and/or drug misuse
- Child sexual abuse
- Family law / custody issues
- Other

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.

The screenshot shows the 'Case Summary' form with the 'Closure' tab selected. A red circle highlights the 'Closure' tab. A red box highlights the 'Closure date' field, a blue box containing 'Rules for determining Case plan goals met', and two dropdown menus for 'Case plan goals met' and 'Reason for case summary closure'. Below these are sections for 'Procedure Review', 'Data Collection', and 'Feedback' with various checkboxes. A 'Save' button is at the bottom.

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
No case plan goals achieved = No goals have an outcome rating of 3 or 4 (all have an outcome of 1 or 2)

Case plan goals met: Please select...
Reason for case summary closure: Please select...

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

Last update

Save

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.

- 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...**
 Reason for case summary closure 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
 Closure Checklist
 Procedure Review

- Complete the **Reason for case summary closure*** from the list of values available (can only select one). **Note:** The list of values for **Reason for case summary closure*** vary according to the response selected for **Case plan goals met***.
- Complete the **Closure checklist** Procedure Review, Data Collection and Feedback sections as appropriate.

VERY IMPORTANT NOTE: Data collection for the Assessments listed is mandatory. An *Initial and 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

- Select **Save**.
- 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

Where email is available, enter the address.

Feedback

Feedback to referrer

Feedback to family regarding referral outcome

Send client survey

Hardcopy provided

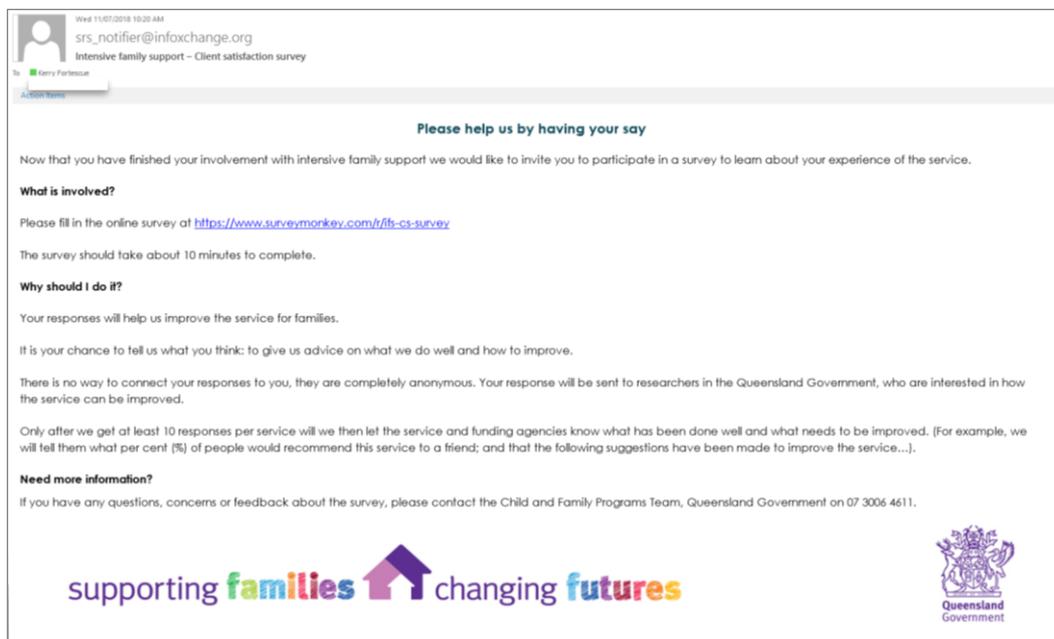
Completed with the service

Email

Client email address

Last update Worker Two, IFS - UAT Service
29/06/2018 12:51:19 AEST

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:



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

Feedback

Feedback to referrer

Feedback to family regarding referral outcome

Send client survey

Hardcopy provided

Completed with the service

Email

Client email address

Client survey sent date

Last update Worker Two, IFS - UAT Service
29/06/2018 13:23:14 AEST

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

The screenshot shows the 'supporting families' interface for Linda Lemon. The 'Cases' section contains the following table:

Description	Role	Workgroup	Start	End
Case Summary				
Lemon Family	Primary Carer	IFS - UAT Service	15/01/2018	29/06/2018

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

Message from webpage

! RECORD NOT SAVED.
The following fields are incomplete:
* Case plan goals met
* Reason for case summary closure
* Closure checklist - all Assessments fields

These fields must be complete before the record is saved.

OK

Message from webpage

! Closure date must not be before Case Creation date

OK

Message from webpage

! RECORD NOT SAVED.
The following fields are incomplete:
* Date of consent to engage with the service cannot be blank when Case Plan Goals met value equals: Case plan goals met, Partial needs met, Referral to another service, or Early Exit reason of Terminated Service/Disengaged

These fields must be complete before the record is saved.

OK

Message from webpage

! RECORD NOT SAVED.
The following fields are incomplete:
* Case Closure date must be earlier than or equal to today's date

These fields must be complete before the record is saved.

OK

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

- 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.

Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana Family	A Coordinator	Open	27/06/2016	07/07/2016		
Carrot Family	O User	Open	27/05/2016	10/06/2016	22/06/2016	
Orange Family		Open	29/06/2016	04/07/2016		
Guava Family	G User	Closed	28/04/2016	05/05/2016	31/05/2016	04/07/2016
Zucchini Family	H User	Closed	12/04/2016	26/04/2016	10/05/2016	28/06/2016

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.

Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Orange Family		Open	29/06/2016	04/07/2016		
Banana Family	A Coordinator	Open	27/06/2016	07/07/2016		
Carrot Family	O User	Open	27/05/2016	10/06/2016	22/06/2016	
Guava Family	G User	Closed	28/04/2016	05/05/2016	31/05/2016	04/07/2016
Zucchini Family	H User	Closed	12/04/2016	26/04/2016	10/05/2016	28/06/2016

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.

The screenshot shows the 'supporting families' system interface. The top navigation bar includes 'Home', 'Persons', 'Groups', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area is titled 'Case Summary' and contains a 'Case List' table with columns for Description, Case Worker, Status, Referral Date, Case Creation Date, Date of consent to engage with the service, and Closure Date. The table lists two cases: 'Mandarin Family' (F User, Open, 18/07/2016, 01/08/2016, 17/08/2016) and 'Carrot Family' (A User, Closed, 25/07/2016, 28/07/2016, 01/08/2016, 01/08/2016). A red circle highlights the 'Create New Case Summary' button in the top right corner of the interface.

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



It is **CRITICAL** to attach **Person records** (including the relevant children) to the Case Summary.

The screenshot shows the 'Case Summary' form with the following fields: * Description (Cucumber Family), * Original Referral Source (Disability Service), * Referral Date (for this service) (01/03/2017), * Case Creation date (03/03/2017), * Is the referrer a prescribed entity (Yes selected), and * Referral Source (Corrective Services). The 'Person' section is visible with columns for Person, Role, Start Date, and End Date, and a plus icon (+) circled in red.

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 only be selected when there is a worker who is able to commence actively engaging and working with the family.

The screenshot shows the 'Service Response' form with the following fields: Case Worker (Please select...), Case Status (Unallocated), Previous Family (Yes/No), and Date of consent to engage with the service.

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.

Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Banana Family	A Coordinator	Open	27/06/2016	07/07/2016		
Carrot Family	O User	Open	27/05/2016	10/06/2016	22/06/2016	
Cucumber Family		Open	01/06/2016	07/06/2016		
Orange Family		Open	29/06/2016	04/07/2016		
Tomato Family	A Coordinator	Open	02/06/2016	10/06/2016		
Guava Family	G User	Closed	28/04/2016	05/05/2016	31/05/2016	04/07/2016
Zucchini Family	H User	Closed	12/04/2016	26/04/2016	10/05/2016	28/06/2016

Date	Record	Type	Notes
04/07/2016	Support	Brokerage	travel assistance to attend s...
07/07/2016	Assessment	Initial	[Wellbeing Domains]
22/06/2016	Note	Home visit	Met with family - gained signe...
15/06/2016	Note	Phone	Contacted family - arranged p...
10/06/2016	Note	File Note	CREATED CASE SUMMARY

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

Workers / Workgroups
A Coordinator, IFS Training 1

Information

Family Safety
Adequate

Material Wellbeing
Moderate Challenge

Connections
Challenge

Health
Moderate Challenge

Child Wellbeing
Moderate Challenge

Parenting
Challenge

Family Interactions
Challenge

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

Date ↓	Record	Type	Notes	Actions
18/06/2019	Note	Home visit	Attended the family home. Very positive and honest discussion. Obtained consent to engage with our service.	
18/06/2019	FAST Assessments and Grid	Initial		
13/06/2019	Assessment [SDM Safety Assessment]	Initial		
11/06/2019	Note	Phone	Contacted Gail to introduce our service. Arranged for our initial visit.	
10/06/2019	Note	File Note	Rec'd referral and created Case summary	

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

The screenshot shows the 'Associated Records' interface. At the top right, there are two buttons: 'Filter' (circled in red) and 'Create New'. Below these is a search filter section with a red border, containing 'From: 10/06/2019', 'To: 18/06/2019', and a 'Record:' dropdown menu set to 'Note'. There are 'Search' and 'Clear' buttons. Below the filter is a table with the following data:

Date	Record Type	Notes	Actions
18/06/2019	Note Home visit	Attended the family home. Very positive and honest discussion. Obtained consent to engage with our service.	
11/06/2019	Note Phone	Contacted Gail to introduce our service. Arranged for our initial visit.	
10/06/2019	Note File Note	Rec'd referral and created Case summary	

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

The screenshot shows the 'Associated Records' interface with the 'Create New' button clicked. The dropdown menu is open, showing the following options:

- Note
- Support
- Alert
- Task
- Assessment**
 - Wellbeing Domains
 - SDM Safety Assessment
 - SDM Family Risk Evaluation
 - SDM Family Risk Re-Evaluation
- Document
- FAST Assessments and Grid

The main content area shows a message: 'There are no records associated to the' and another message: 'Referrals and Plans do not display in this table. You must go to the Persons page.'

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.

This review is associated with (tick):		
Peter Potato	Referred Child	<input checked="" type="checkbox"/>
Paula Potato	Carer/parent	<input checked="" type="checkbox"/>

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.

Service Response

Case Worker

Case Status

Previous Family Yes No

Date of consent to engage with the 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**

supporting families IFS Training 1
Carissa Carrot Female, DOB: 14/04/1985 (Age 33 yrs)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents Membership

Persons Groups Days Cases Reports Admin

Consents

No Consents to display

* Worker/s A Coordinator, IFS Training 1

Start date 25/01/2019

Review date

End Date

Consent to engage with the service Yes No

Notes

This consent is also associated with (tick):

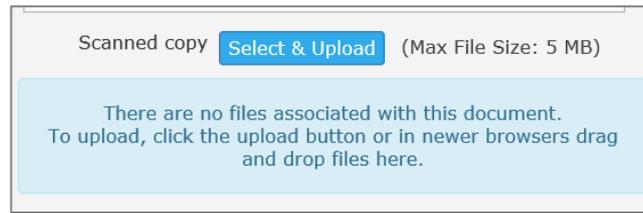
Name	Relationship	Associate record with:
Charles Carrot	Husband	<input type="checkbox"/>
Charlotte Carrot	Daughter	<input type="checkbox"/>

May be viewed by Workgroup Cluster

Last update

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.

Centre based Accommodation support Appointment Client meeting Drop In Group Work Informal interaction
External Phone Home visit Meeting In-home Support Transport
Other Case coordination Correspondence File Note

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.

Reported to <input type="checkbox"/> Child Safety (RIS) <input type="checkbox"/> Child Safety (CSSC)
--

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

Consultation with <input type="checkbox"/> PCPP <input type="checkbox"/> DFV Consultation <input type="checkbox"/> Cultural Consultation <input type="checkbox"/> Disability Support <input type="checkbox"/> Practice Consultation <input type="checkbox"/> Other

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.

Edit Note Details 📄 ?

Activity Date 📅

* Worker/s 👤 B Coordinator, IFS Training 1 ✖
K User, IFS Training 1 ✖

* Activity Type ▼

Case Summary ▼

Notes ⏮ ⏭

Conducted initial meeting with the family

Service provided

- Child / Family
- Health / Counselling
- General Support/ Counselling / Advocacy
- Domestic and Family Violence (DFV)
- General/ Personal Support
- Financial/Employment
- Other

Reported to

- Child Safety (RIS)
- Child Safety (CSSC)

Consultation with

- PCPP
- DFV Consultation
- Cultural Consultation
- Disability Support
- Practice Consultation
- Other

This note is also associated with (tick):

Constance Cucumber	Mother	<input checked="" type="checkbox"/>
Candice Cucumber	Sister	<input checked="" type="checkbox"/>

Activity Length	Contact	Case Work	Travel	mins
	<input type="text" value="45"/>	<input type="text" value=""/>	<input type="text" value="30"/>	

May be edited to 10/03/2017

Last update B Coordinator, IFS Training 1
07/03/2017 15:26:41

[Print View](#)

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.

Note Details ?

Activity Date 29/06/2018

Worker/s Worker Two, IFS - UAT Service

Work group IFS - UAT Service

Activity Type Meeting

Case Summary Eggplant Family

Notes
Met with the family for an initial visit. Had a frank discussion about their current challenges and discussed support options for the family.

Also associated with: Eddie Eggplant, Son
Carl Cucumber, Husband

Activity Length

Contact	Case Work	Travel
50		30 mins

Edit locked 02/07/2018

Last update Worker Two, IFS - UAT Service
29/06/2018 15:28:37 AEST

[Print View](#)

Note Details ?

Activity Date 29/06/2018

Worker/s Worker Two, IFS - UAT Service

Work group IFS - UAT Service

Activity Type Meeting

Case Summary Eggplant Family

Notes
Met with the family for an initial visit. Had a frank discussion about their current challenges and discussed support options for the family.

Also associated with: Eddie Eggplant, Son
Carl Cucumber, Husband

Activity Length

Contact	Case Work	Travel
50		30 mins

Edit locked 02/07/2018

Unlock for Days

Unlock reason

- Please select
- Remove record from incorrect person
- Remove record from incorrect workgroup
- Edit inappropriate or incorrect information in text fields
- Edit incorrect dates
- Edit to other non-text fields
- Other

Last update

[Print View](#)

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

1. Enter the number of days you wish the record to be open for (it will automatically re-lock after this time)
2. Select an **Unlock reason**
3. Click **Save**.



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.

Search Details **Notes** Supports Alerts Consent Referrals Plans Tasks Assessment

Notes [Filter](#) [Create New Note](#) < >

Activity Date ↑	Worker / Type	Notes
07/07/2016	A Coordinator <i>File Note</i>	CLOSED CASE SUMMARY
07/07/2016	A Coordinator <i>Case coordination</i>	Internal review to determine next steps for the family
28/06/2016	B User <i>Case coordination</i>	Review file and assess service actions
24/06/2016	B User <i>Home visit</i>	Discussed many issues and completed Assessments
22/06/2016	A Coordinator <i>Home visit</i>	Met with family - gained signed consent. Very positive meeting.
15/06/2016	A Coordinator <i>Phone</i>	Contacted family - arranged preliminary meeting for 22nd.
10/06/2016	A User <i>File Note</i>	CREATED CASE SUMMARY

[Export Notes](#) 1 to 7 of 7

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.

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

Home Case Summary

Persons Records: 20 Show Filters Create New Case Summary

Groups Case List

Days

Cases

Reports

Admin

Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Avocado	A Coordinator	Open	10/06/2019	11/06/2019		
Banana	A Coordinator	Open	03/06/2019	04/06/2019	10/06/2019	
Tomato	A Coordinator	Open	27/05/2019	30/05/2019		

Recent List: Bernard Banana, Tony Tomato, Amy Avocado, Bella Banana

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

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

Home Case Summary

Persons Records: 20 Show Filters Create New Case Summary

Groups Case List

Days

Cases

Reports

Admin

Date	Record Type	Notes
07/06/2019	Note	Case coordination
11/06/2019	Task	Appointment
06/06/2019	Note	Phone
04/06/2019	Note	File Note

1 to 3 of 3 results

Associated Records

Filter Create New

- Note
- Support
- Alert
- Task
- Assessment
 - Wellbeing Domains
 - SDM Safety Assessment
 - SDM Family Risk Evaluation
 - SDM Family Risk Re-Evaluation Document
 - FAST Assessments and Grid**

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

Associated Records > FAST Assessments and Grid

FAST Assessments and Grid

*Date of Assessment: 24/06/2019

*Assessment Stage: Please select...
Initial
Subsequent
Closing

Lock after

Last update

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

Associated Records > FAST Assessments and Grid

FAST Assessments and Grid

Person	Start Date	End Date	
Bella Banana	24/06/2019		
Bianca Banana	24/06/2019		
Boyd Banana	24/06/2019		
Brian Banana	24/06/2019		

Case Summary

*Date of Assessment

*Assessment Stage

FAST Child Assessments

No available record

FAST Adult Assessments

No available record

FAST Grid

No Results available

Lock after

Last update A Coordinator, IFS Training 1
24/06/2019 14:03:57 AEST

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

Associated Records > FAST Assessments and Grid > FAST Adult Assessment

FAST Adult Assessment for Bella Banana

Bella Banana (female, 39yrs)

*Date of Assessment

Worker/s A Coordinator, IFS Training 1

Domains	Major Challenge	Challenge	Strength	Major Strength
Physical Health	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Emotional Well-being	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cognitive Skills and Ability	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Substance Use	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Legal/Justice	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Parenting	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial and Material Resources	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intimate Partner Relationships	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Household Relationships and Interactions	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connections to Family, Community and Culture	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical Environment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Employment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Lock after

Last update A Coordinator, IFS Training 1
24/06/2019 15:27:56 AEST

Click **Save**.

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

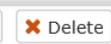
Click the **blue cross** for Child Assessments and Adult Assessments, as relevant, to record the assessment results for the persons in your Case.

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

click 

The following will display

FAST Grid	
Created at	Created by
24/06/2019 15:34:09 AEST	A Coordinator



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

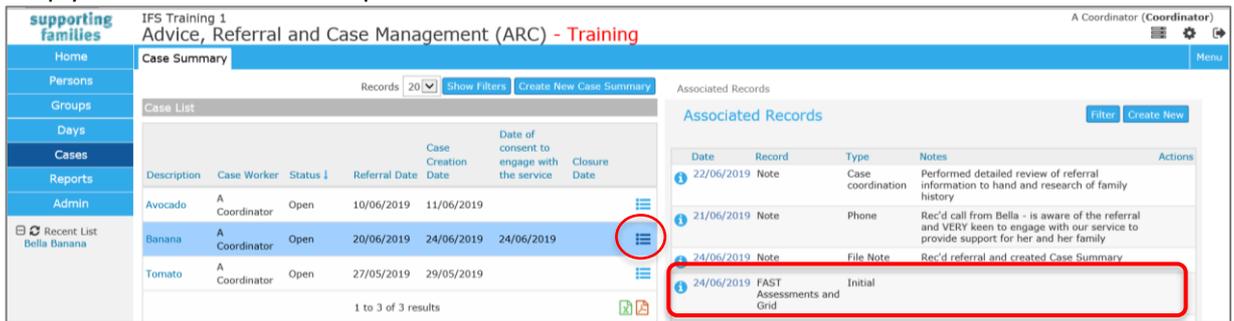
FAST Grid  

FAST Assessments and Grid

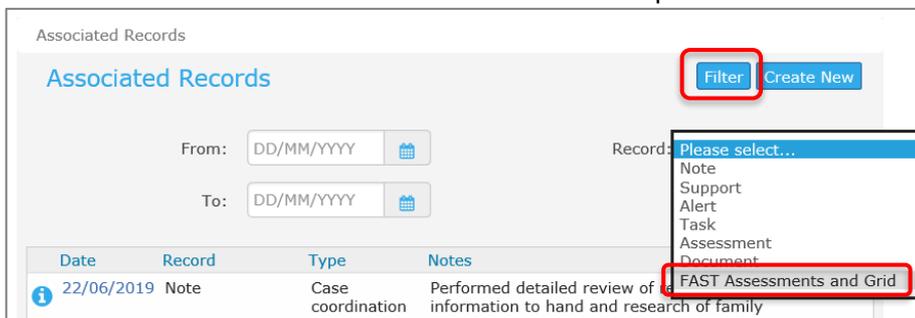
Created at	01/07/2019 11:54:06
Created by	Worker Two
Case Summary	Banana
Date of Assessment	24/06/2019
Assessment Stage	Initial

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.

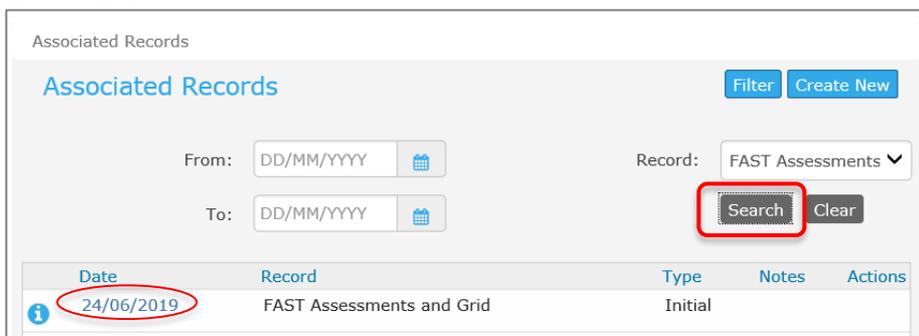
10. Completed **FAST Assessment and Grid** records are 'filed' and accessed from **Associated Records** for your family Case, from the Cases page. Simply click the **blue date** to open the record.



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



12. Click **Search**

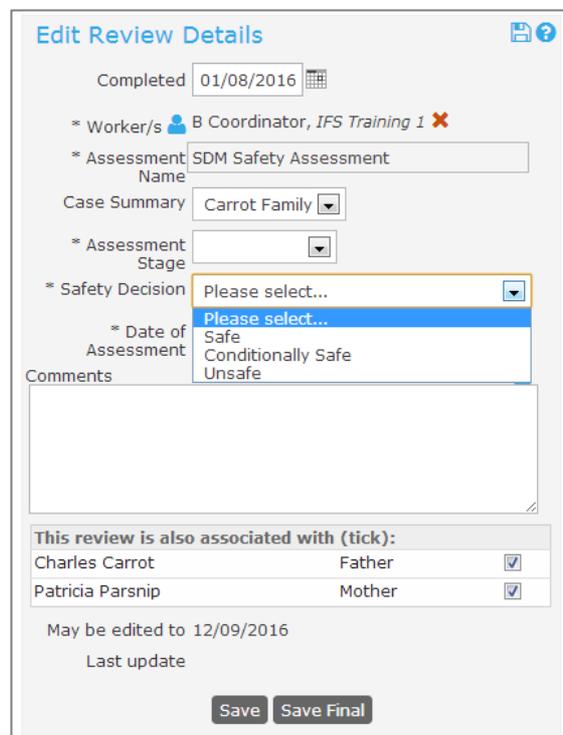


All **FAST Assessment and Grid** records will be displayed. Simply click on the **blue date** to open the record.

8.3 Complete *SDM Safety Assessment*

Note: 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.



Edit Review Details

Completed

* Worker/s  B Coordinator, IFS Training 1 

* Assessment Name

Case Summary

* Assessment Stage

* Safety Decision

* Date of Assessment

Comments

This review is also associated with (tick):

Charles Carrot	Father	<input checked="" type="checkbox"/>
Patricia Parsnip	Mother	<input checked="" type="checkbox"/>

May be edited to 12/09/2016
Last update

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.

The screenshot shows the 'Plans' page in a web application. The top navigation bar includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', and 'Documents'. The left sidebar has 'Persons', 'Groups', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area is titled 'Plans' and shows 'No Plans to display'. A 'Create New Plan' button is circled in red. Below this is the 'Edit Plan Details' form.

Edit Plan Details

Date: 02/04/2020

This plan is also associated with (tick):

Review date: [calendar icon]

Close date: [calendar icon]

Last update: [calendar icon]

* Oversight: Allison Scanlan, IFS - FAST UAT

Description: [text input]

Name	Relationship	Associate record with:
Brian Hunter	Husband	<input type="checkbox"/>
Madison Hunter	Daughter	<input type="checkbox"/>

Save

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.

The screenshot shows the 'Plans' page with a list of plans and the 'Edit Plan Details' form.

Plans

Date	Review Date	Worker	Work Group	Description
02/04/2020	02/07/2020	Allison Scanlan		

Export Plans 1 to 1 of 1

Edit Plan Details

Date: 02/04/2020

This plan is also associated with (tick):

Review date: 02/07/2020

Close date: [calendar icon]

Last update: Allison Scanlan, IFS - FAST UAT 02/04/2020 10:13:34 AEST

* Oversight: Allison Scanlan, IFS - FAST UAT

Description: [text input]

Name	Relationship	Associate record with:
Brian Hunter	Husband	<input checked="" type="checkbox"/>
Madison Hunter	Daughter	<input checked="" type="checkbox"/>

Goals

Create New Goal

No Goals to display

Save Delete

9.2 Create new Goal within a Plan

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

The screenshot shows the 'Edit Plan Details' form for Holly Hunter. The form is divided into several sections: 'Plans', 'Edit Plan Details', 'Goals', and 'Edit Goal Details'. The 'Plans' section shows a table with one plan entry. The 'Edit Plan Details' section includes fields for Date, Review date, Close date, Last update, and Oversight. The 'Goals' section has a 'Create New Goal' button circled in red. The 'Edit Goal Details' section includes fields for Date, Review date, Closed date, Challenge/Major Challenge, Worry Statement, Family Strengths/Resources, Goal Statement, Outcome, and Comments on Outcome. There are also 'Save' and 'Delete' buttons at the bottom.

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.

The screenshot shows a 'Goals' interface with a table of goals and an 'Edit Goal Details' form below it. The table has columns for Date/Worker, Challenge/Major Challenge, Worry Statement, Family Strengths and Resources, Service, Goal Statements, Actions, and Review/Close. The 'Edit Goal Details' form includes fields for Date, Review date, Closed date, Challenge/Major Challenge, Worry Statement, Family Strengths/Resources, Service, Goal Statement, Actions, Outcome, and Comments on Outcome. An 'Order' field is circled in red, showing the value '3'.

A menu with three options: New Note, New Support, and New Task. The 'New Note' option is highlighted with a yellow background.

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 particularly useful, time-efficient feature. All records associated with the Goal can be viewed from the  icon, simply click to display.

An 'Order' field with a text input box containing the number '0'.

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)

The screenshot displays the 'Goals' section of a software interface. At the top, there is a 'Create New Goal' button. Below it is a table with the following columns: 'Date/Worker', 'Challenge/Major Challenge, Worry Statement, and Family Strengths and Resources', 'Goal Statements', 'Actions', and 'Review/Close'. Three rows of goal data are visible, all dated 02/04/2020 and assigned to Allison Scanlan. The first row's challenge is 'Primary Parent - Physical Health', the second is 'Secondary Parent - Substance Use', and the third is 'Child - Emotional Well-being'. Each row has placeholder text for 'Goal Statements', 'Actions', and 'Review/Close'.

Below the table is the 'Edit Goal Details' form. It includes fields for 'Date' (02/04/2020), 'Review date', and 'Closed date'. The 'Challenge/Major Challenge' is set to 'Primary Parent - Physical Health'. The 'Worry Statement' and 'Family Strengths/Resources' fields contain placeholder text. The 'Outcome' dropdown menu is open, showing a list of four options: '1 - Goal not achieved', '2 - Goal partially achieved', '3 - Goal mostly achieved', and '4 - Goal fully achieved'. The 'Comments on Outcome' field is empty. At the bottom of the form are 'Save' and 'Delete' buttons.

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**.

Edit Plan Details

Date: 02/04/2020

* Oversight: Allison Scanlan, IFS - FAST UAT

Description:

This plan is also associated with (tick):

Name ↑	Relationship	Associate record with:
Brian Hunter	Husband	<input checked="" type="checkbox"/>
Madison Hunter	Daughter	<input checked="" type="checkbox"/>

Review date: 02/07/2020

Close date: 02/04/2020

Last update: Allison Scanlan, IFS - FAST UAT
02/04/2020 11:56:32 AEST

Goals

[Create New Goal](#) [View Prior](#)

No current Goals to display

Prior Goals

Date/Worker	Challenge/Major Challenge, Worry Statement, and Family Strengths and Resources	Goal Statements	Actions	Review/Close
02/04/2020 Allison Scanlan	Challenge/Major Challenge: Primary Parent - Physical Health Worry Statement: ...enter details here Family Strengths and Resources: ...enter details here Service:	enter details here...	enter details here...	Review: Not Set Closed: 02/04/2020 Outcome: 1 - Goal not achieved Comments: enter details here
02/04/2020 Allison Scanlan	Challenge/Major Challenge: Secondary Parent - Substance Use Worry Statement: enter worry statement here. Family Strengths and Resources: enter details here Service:	enter details here	enter details here	Review: Not Set Closed: 02/04/2020 Outcome: 4 - Goal fully achieved Comments: enter details here
02/04/2020 Allison Scanlan	Challenge/Major Challenge: Child - Emotional Well-being Worry Statement: enter details here Family Strengths and Resources: enter details here Service:	enter details here	enter details here	Review: Not Set Closed: 02/04/2020 Outcome: 3 - Goal mostly achieved Comments: enter details here

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**.

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'IFS Training 1' and is viewing the profile of 'Peter Potato' (Male, DOB: 15/05/2005, Age 10 yrs). The 'Supports' tab is selected, and the 'Create New Support / Brokerage' button is highlighted with a red circle. The form on the right is titled 'Edit Support/Brokerage Details' and includes the following fields:

- Date: 29/04/2016
- * Worker/s: A dropdown menu with a plus icon to add more workers and a minus icon to remove them.
- * Support type: A dropdown menu with 'Emergency Relief' and 'Brokerage' options selected.
- Case Summary: A text input field.
- Amount: \$ 0
- Details: A large text area for recording the nature and reason for support.
- Payment sub-tab: Includes fields for Provider Name, Service type (Please select...), Expenditure type (Goods or Services), Brokerage code, Method of payment (Please select...), and Payment date.
- Last update: A timestamp field.
- Save button: A button to save the record.

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.

The screenshot shows the 'supporting families' interface. At the top, it displays 'IFS Training 1' and 'Peter Potato Male, DOB: 15/05/2005 (Age 11 yrs)'. A navigation bar includes 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', 'Documents', and 'Membership'. The 'Supports' tab is active, showing a table of 'Support/Brokerage' records. The table has columns for Date, Worker / Type, Details, and Amount. The records are:

Date	Worker / Type	Details	Amount
02/08/2016	B Coordinator Brokerage	Medical assessment	\$150.00
20/07/2016	E User Brokerage	Participation in After School Care Program - FOC	\$0.00
04/07/2016	B Coordinator Brokerage	NOT APPROVED - request for additional Go Card	\$0.00
28/06/2016	B Coordinator Brokerage	GoCard for attending therapy sessions	\$30.00
Total:			\$180.00

Below the table is an 'Export Support / Brokerages' button and a note '1 to 4 of 4'. To the right is the 'Edit Support/Brokerage Details' form, which includes fields for Date (02/08/2016), Worker/s (B Coordinator, IFS Training 1), Support type (Brokerage), Case Summary (Potato Family), Amount (\$ 150.00), Details (Medical assessment), Payment (Approval), Provider Name (Family Medical Services), Service type (Health assessments and treatment), Expenditure type (Goods/Services), Service provision time (minutes) (120), Brokerage code, Method of payment (Credit Card), and Payment date (11/08/2016). It also shows 'Last update B Coordinator, IFS Training 1 02/08/2016 10:30:21' and 'Print View' button.

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.

The screenshot shows the 'Approval' sub-tab of the 'Edit Support/Brokerage Details' form. The 'Payment' and 'Approval' tabs are visible at the top, with 'Approval' selected. The form contains the following fields:

- Approved: Yes No
- Reason not approved:
- Authorised by:
- Position:
- Authorised date:
- Last update: A Coordinator, IFS Training 1 29/04/2016 13:46:43

At the bottom, there are 'Save' and 'Delete' buttons, and a 'Print View' button in the bottom left corner.

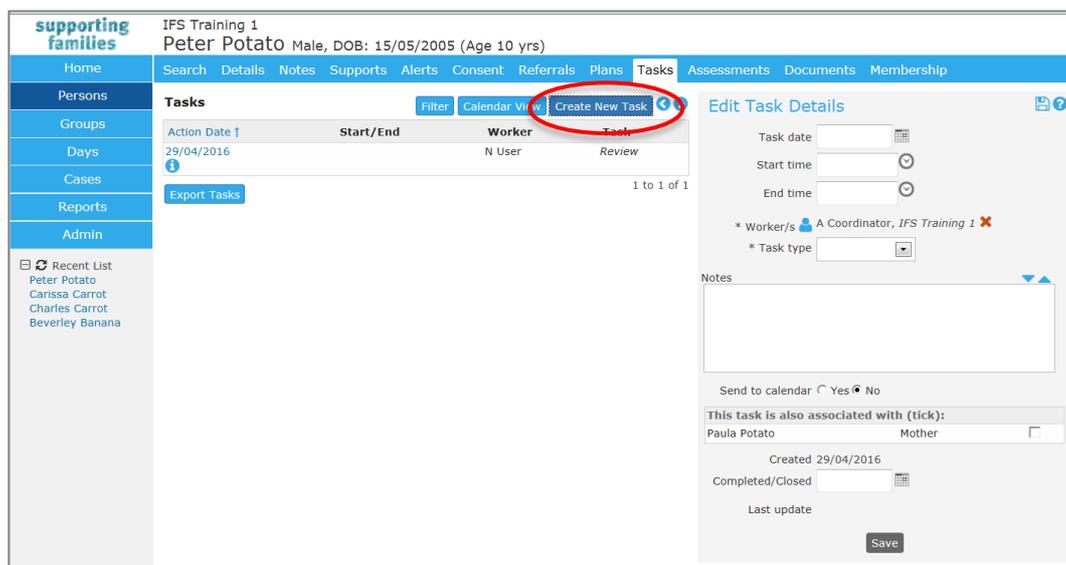
4. Enter **Approval** (Yes or No), if No is selected enter a **Reason not approved**.
5. Enter the **Authorised by, Position and Authorised Date ***
6. Select **Save**.

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**.

Edit Task Details

Task date: 24/05/2016

Start time: 10:00 am

End time: 12:00 pm

* Worker/s: A Coordinator, IFS Training 1
C User, IFS Training 1

* Task type: Review

Notes: Internal case review meeting

Send to calendar: Yes No

This task is also associated with (tick):
Paula Potato Mother

Created: 29/04/2016

Completed/Closed: [calendar icon]

Last update: A Coordinator, IFS Training 1
29/04/2016 13:54:29

Buttons: Save, Delete, Print View

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

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

supporting families IFS Training 1
Peter Potato Male, DOB: 15/05/2005 (Age 10 yrs)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks

Persons **Tasks** Filter **Calendar View** Create New Task

Action Date	Start/End	Worker	Task
24/05/2016	10:00 am 12:00 pm	A Coordinator	Review Internal case review meeting
29/04/2016		N User	Review

Export Tasks 1 to 2 of 2

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

supporting families IFS Training 1 Peter Potato Male, DOB: 15/05/2005 (Age 10 yrs) A Coordinator (Coordinator)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents Membership Menu

Persons **Tasks** Filter List View **Day** Week Month

Today < > May 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30		1	2	3	4
5	6	7	8	9	10	11

Task popup for May 24th:
10:00am Review
Review
Task Date: 24/05/2016
Start Time: 10:00 am
End Time: 12:00 pm
Notes: Internal case review meeting
Workers / Workgroups
A Coordinator, IFS Training 1
C User, IFS Training 1

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:

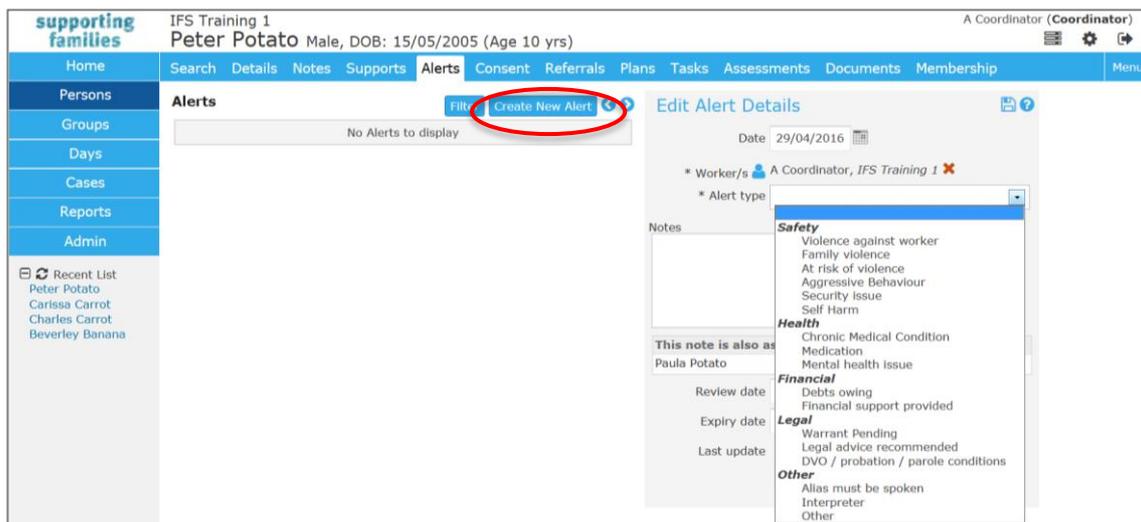
- Once a Task has been completed, enter the date in the Completed/Closed field using the calendar icon.
- To export tasks to a PDF file, click Export Tasks and the Export Task to PDF form will appear to the right of screen.
- You can filter the tasks list by clicking **Filter** and selecting the desired 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**.



The screenshot shows the 'supporting families' interface for a user named Peter Potato. The 'Alerts' tab is selected, and the 'Create New Alert' button is highlighted with a red circle. The 'Edit Alert Details' form is open, showing a date of 29/04/2016 and a list of alert types including Safety, Health, Financial, Legal, and Other.

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.



The screenshot shows the 'supporting families' interface for a user named Peter Potato. The 'Person / Alias' tab is selected, and a red warning icon is circled next to the person's name. The 'Edit Primary Details' form is open, showing the given name 'Peter'.

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.

The screenshot shows the 'Referral' form for Peter Potato. The 'Send referral to' dropdown menu is open, and the 'Family Services' option is selected and highlighted with a red box. The form also includes a 'Submit' button and a 'Create new Referral' button.

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:

The screenshot shows the 'Referrals' tab with the 'Sent' sub-tab selected and highlighted with a red circle. The table below lists the referrals:

Id	Send Date	Status	Sent From	Sent To	Sent By	Client
176	29/04/2016	Declined	Hamilton Island IFS IFS Training 1	Caboiture Central Early Education Centre & Preschool	A Coordinator	Carissa Carrot DOB: 14/04/2006 Gender: Female
174	29/04/2016	Waiting	Hamilton Island IFS IFS Training 1	Willis Island IFS IFS Practice 2	A Coordinator	Beverley Banana DOB: 14/07/2004 Gender: Female
173	29/04/2016	Accepted	Hamilton Island IFS IFS Training 1	ABC Better Living	A Coordinator	Beverley Banana DOB: 14/07/2004 Gender: Female

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**.

supporting families IFS Training 1
Peter Potato Male, DOB: 15/05/2005 (Age 11 yrs)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents Membership

Persons Referrals Create new Referral Referral ?

Id	Referral Date	Status	From	To
<input checked="" type="checkbox"/> 200	07/03/2017	Waiting	Hamilton Island IFS IFS Training 1	Dunk Island IFS IFS Training 2

Referral type: Search Favourites Manual Family Services

Send referral to:

The Referral form appears.

Referral ?

Status New referral

From Hamilton Island IFS

To Dunk Island IFS

Service Dunk Island IFS

Program / Group

Organisation IFS Training 2

For Peter Potato

Referred Persons

Please save record to associate clients

Details

* Service Type

Presenting issues

Additional Information

Attachments

Referral should be saved as draft before attaching any document.

Referral History

Consent to send Yes No

Comment

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

The screenshot shows a 'Referral' form with the following details:

- Status:** New referral
- From:** Hamilton Island IFS
- To:** Dunk Island IFS
- Service:** Dunk Island IFS
- Program / Group:** (empty text box)
- Organisation:** IFS Training 2
- For:** Peter Potato
- Referred Persons:** (empty list)
- Details:** (empty text box)
- * Service Type:** A dropdown menu is open, showing three options: 'Referred - ATSI Family Wellbeing', 'Referred - Family and Child Connect', and 'Referred - Intensive Family Support'.
- Additional Information:** (empty text box)
- Attachments:** A yellow warning box states 'Referral should be saved as draft before attaching any document.'
- Referral History:** (empty list)
- Consent to send:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Comment:** (empty text box)
- Buttons:** 'Save Draft' and 'Send' buttons are at the bottom, with 'Save Draft' circled in red.

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).

The screenshot shows the 'Referral' form with the following details:

- Status:** Draft
- From:** Hamilton Island IFS
- To:** Dunk Island IFS
- Service:** Dunk Island IFS
- Program / Group:** (empty text box)
- Organisation:** IFS Training 2
- For:** Peter Potato
- Referred Persons:** (empty list)
- Additional associated clients:** A plus icon (+) is circled in red at the bottom right of this section.

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.



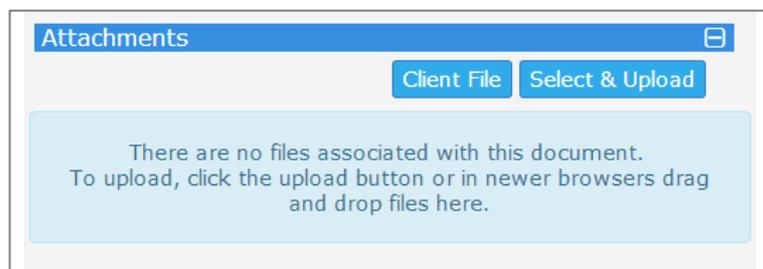
Click **Save**.
The selected Persons are now linked to the Referral.



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**.

Export Person Details

Document Title: Peter Potato Client File

Person Information	Include
Name, Sex, DOB	<input checked="" type="checkbox"/>
Demographic Details	<input checked="" type="checkbox"/>
Current Relationships	<input checked="" type="checkbox"/>

Cases

Potato Family (Case Summary 07/03/2017 -)	<input checked="" type="checkbox"/>
--	-------------------------------------

Additional Details

Select All	<input type="checkbox"/>
Notes	<input checked="" type="checkbox"/>
Supports	<input type="checkbox"/>
Alerts	<input type="checkbox"/>
Consent	<input type="checkbox"/>
Plans	<input type="checkbox"/>
Tasks	<input type="checkbox"/>
Assessments	<input checked="" type="checkbox"/>
Documents	<input type="checkbox"/>

Page control: No page break between each record

Order: Most recent at top

Export period: Full History

Include worker name details: Yes No

Additional Notes:

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.

Attachments

Client File Select & Upload

File Name	Uploaded
client_file_2289.pdf	07/03/2017 15:47:13
client_file_1_Original referral.pdf	07/03/2017 15:47:13
client_file_2_Family consent.docx	07/03/2017 15:47:13

Referral History

Consent to send: Yes No

Comment:

Save Draft Send Delete PDF Copy

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.

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

Home My List Team List My Actions Team Actions **Referrals** Service Directory Enquiry

Persons Received Accepted Declined **Sent** Draft

Groups

Days

Cases

Reports

Admin

Recent List
 Peter Potato
 Charlie Cucumber

Referrals

Id	Send Date ↓	Status	Sent From	Sent To	Sent By	Client
 200	07/03/2017	Waiting	Hamilton Island IFS IFS Training 1	Dunk Island IFS IFS Training 2	B Coordinator	Peter Potato DOB: 15/05/2005 Gender: male

1 to 1 of 1 results

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 screenshot shows the 'supporting families' web application interface. At the top, it displays 'IFS Training 1' and the user's name 'Alan Robinhood Male, DOB: 20/01/2010 (Age 7 yrs)'. The navigation menu includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', 'Documents', and 'Membership'. The 'Referrals' tab is active, showing a 'Create new Referral' button and a 'Referral' form. The form has radio buttons for 'Search', 'Favourites', 'Manual' (selected), and 'Family Services'. Fields include 'Service Name' (ABC Better Living), 'Program / Group', 'Organisation Name', 'Phone' (4589 1234), 'Fax', and 'Email'. A 'Submit' button is circled in red.

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.

The screenshot shows the 'Referral' form with a light blue reminder box at the top: 'This type of referral will NOT be sent electronically. You may wish to PDF the referral and send this manually to the destination service.' Below this, the 'Referral sent' date is '07/03/2017'. The status is 'New referral'. The form is filled with: 'From Hamilton Island IFS', 'To ABC Better Living', 'Service: ABC Better Living', 'Program / Group', 'Organisation', 'Phone: 4589 1234', 'Fax', 'Email', 'For Alan Robinhood', 'Referred Persons', and a button 'Please save record to associate clients'. At the bottom, there is a 'Details' section with a '* Service Type' dropdown menu.

- 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

- 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.

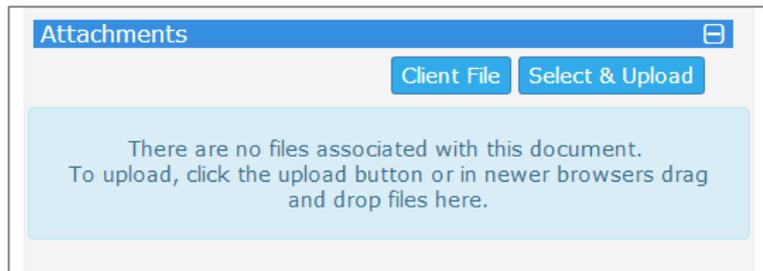
- Using the **Related** search button, select the Persons to be included in the referral.
Note: It may be that only some of the Persons with whom relationships are held are included in the Case. Click **Save**. The selected Persons are now included in the Referral.

Additional associated clients	Relationship
Maid Maryon	Mother

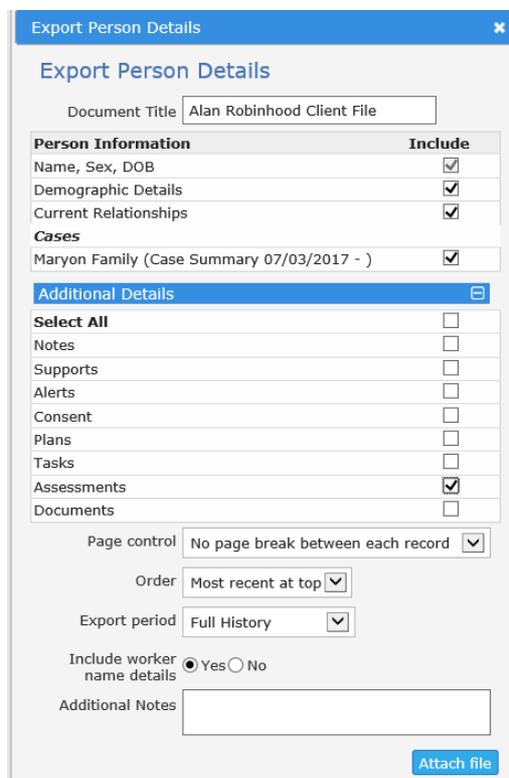
- Enter in **Presenting Issues** and **Additional Information** if required.
- Enter any **Comments** and select **Save Draft**.

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.

- 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)



- 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**.



Person Information	Include
Name, Sex, DOB	<input checked="" type="checkbox"/>
Demographic Details	<input checked="" type="checkbox"/>
Current Relationships	<input checked="" type="checkbox"/>
Cases	
Maryon Family (Case Summary 07/03/2017 -)	<input checked="" type="checkbox"/>
Additional Details	
Select All	<input type="checkbox"/>
Notes	<input type="checkbox"/>
Supports	<input type="checkbox"/>
Alerts	<input type="checkbox"/>
Consent	<input type="checkbox"/>
Plans	<input type="checkbox"/>
Tasks	<input type="checkbox"/>
Assessments	<input checked="" type="checkbox"/>
Documents	<input type="checkbox"/>

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.

File Name	Uploaded
client_file_2291.pdf	07/03/2017 16:52:27
client_file_1_Original referral.pdf	07/03/2017 16:52:27
client_file_2_CSS Report card.docx	07/03/2017 16:52:27

Referral History

Consent to send Yes No

Comment

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

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.

Referral History

Consent to send Yes No

Comment: Consent NOT received from client. Referral made on the basis of ... <insert relevant details>

Save Draft Send Delete PDF Copy

13. Click **Waiting**.

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

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

The screenshot shows the 'supporting families' interface for a user named Alan Robinhood. The 'Referrals' tab is active, displaying a table with one referral entry. The status of this referral is 'Waiting'. A dropdown menu for the status is open, showing options: Update, Recall, PDF, Accepted, and Declined. The 'Accepted' and 'Declined' options are highlighted with a red box.

Id	Referral Date	Status	From	To
204	07/03/2017	Waiting	Hamilton Island IFS IFS Training 1	ABC Better Living

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

The screenshot shows the same user profile and referral, but the status has been updated to 'Accepted'. The 'Accepted' status in the table is highlighted with a red box.

Id	Referral Date	Status	From	To
204	07/03/2017	Accepted	Hamilton Island IFS IFS Training 1	ABC Better Living

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

Home My List Team List My Actions Team Actions Referrals Service Directory Enquiry

Persons
Groups
Days
Cases
Reports
Admin

Received Accepted Declined **Sent** Draft

Referrals

Id	Send Date ↓	Status	Sent From	Sent To	Sent By	Client
204	07/03/2017	Accepted	Hamilton Island IFS IFS Training 1	ABC Better Living	B Coordinator	Alan Robinhood DOB: 20/01/2010 Gender: male
200	07/03/2017	Waiting	Hamilton Island IFS IFS Training 1	Dunk Island IFS IFS Training 2	B Coordinator	Peter Potato DOB: 15/05/2005 Gender: male

1 to 2 of 2 results

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**.

supporting families IFS - UAT Service Alan Robinhood Male, DOB: 20/01/2010 (Age 6 yrs)

Worker Two (Coordinator)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents Membership Menu

Referrals Create new Referral

Id	Referral Date	Status	From	To
340	02/08/2016	Accepted	IFS - UAT Service IFS - UAT Service organisation	ABC Better Living

Referral

Search Favourites Manual Family Services

"maroochydore" Search Clear

Search Results from Service Seeker

★ Magistrates' Court of Queensland, Maroochydore Maroochydore

(07) 5470 8111
courthouse.maroochydore@justice.qld.gov.au
Now open
Commeal Parade
Maroochydore 4558
A magistrates' court.
More information >

Make a referral

★ Child Support Agency, Maroochydore Maroochydore

13 1272
Now open
5 Maud Street
Maroochydore 4558
A government child support agency.
More information >

Make a referral

The Referral form will appear.

Referral ?

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

Referral sent 02/08/2016

Status New referral

From IFS - UAT Service

To Child Support Agency, Maroochydore

Service Child Support Agency, Maroochydore

Program / Group

Organisation Commonwealth Department of Human Se

Phone 13 1107

Fax 1300 309 949

Email

For Alan Robinhood

Referred Persons

Please save record to associate clients

Details

* Service Type

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.

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

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

The screenshot shows the 'supporting families' interface for a person named Alan Robinhood. The 'Referrals' tab is active, and the 'View Recalled and Declined' link is highlighted with a red circle. Below this, a table lists a 'Declined' referral. The table has columns for Id, Referral Date, Status, From, and To. The referral details are as follows:

Id	Referral Date	Status	From	To
341	02/08/2016	Declined	IFS - UAT Service IFS - UAT Service organisation	Happy Children, Happy Adults

Additional details for the referral include: Referral sent 02/08/2016, Status Declined, From IFS - UAT Service, To Happy Children, Happy Adults, Service Happy Children, Happy Adults, and Phone 1234 1256. The reason for decline is 'No capacity at this time'.

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.

IFS Training 1
Advice, Referral and Case Management (ARC) - Training

Home My List Team List My Actions Team Actions **Referrals** Service Directory Enquiry

Persons **Received** Accepted Declined Sent Draft

Groups

Days

Cases

Reports

Admin

Recent List
Alan Robinhood
Peter Potato
Charlie Cucumber

Id	Send Date ↓	Status	Sent From	Sent By	Client
206	07/03/2017	Waiting	Hamilton Island FaCC FaCC Training 1	B Coordinator	Carmile Carrot DOB: 02/02/2012 Gender: male
2357	07/03/2017	Waiting	familychildconnect online	Kerry Koala	Michael Mushroom DOB: 07/08/2012 Gender: male

1 to 2 of 2 results

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

IFS Training 1
Advice, Referral and Case Management (ARC) - Training

Home My List Team List My Actions Team Actions **Referrals** Service Directory Enquiry

Persons Received Accepted Declined Sent Draft

Groups

Days

Cases

Reports

Admin

Recent List
Alan Robinhood
Peter Potato
Charlie Cucumber

Id	Send Date ↓	Status	Sent From	Sent By	Client
206	07/03/2017	Waiting	Hamilton Island FaCC FaCC Training 1	B Coordinator	Carmile Carrot DOB: 02/02/2012 Gender: male
2357	07/03/2017	Waiting	familychildconnect online	Kerry Koala	Michael Mushroom DOB: 07/08/2012 Gender: male

1 to 2 of 2 results

Referral

Link referral to database

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

Given name: Michael Family name: Mushroom

Fuzzy

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

Referral sent 07/03/2017 17:12:48

Status Waiting

Reference 2QQQ-45W9
number

From familychildconnect online

3. Click **Acknowledge**.

Attachments

File Name	Uploaded
Referral_2QQQ-45W9.pdf	07/03/2017 17:12:51

Referral History

Comment

Acknowledge Update PDF

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

The screenshot shows the 'Referral' interface. At the top, there's a 'Link referral to database' section with a warning message: 'This external referral is not yet associated with a Person on your database. If you plan to accept this referral you must first create a Person record, or associate the referral with an existing Person.' Below this, there are input fields for 'First: Peter' and 'Last: Potato', a 'Fuzzy' checkbox, and a 'Search' button. A table below shows a search result for 'Peter Potato' with a white person icon and a blue link icon circled in red. At the bottom, there is a button 'Add Peter Potato as new Person' and a timestamp 'Referral sent 02/08/2016 13:25:41'.

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.

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

The screenshot shows the 'Referral' interface. At the top, there's a 'Link referral to database' section with a warning message: 'This external referral is not yet associated with a Person on your database. If you plan to accept this referral you must first create a Person record, or associate the referral with an existing Person.' Below this, there are input fields for 'Given name: Carmile' and 'Family name: Carrot', a 'Fuzzy' checkbox, and a 'Search' button. A message below the search button says: 'This person does not appear to be in the database. You might want to make sure by modifying the search criteria. If you are not sure about the spelling try using the # symbol as a wildcard.' At the bottom, the button 'Add Carmile Carrot as new Person' is highlighted with a red box.

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

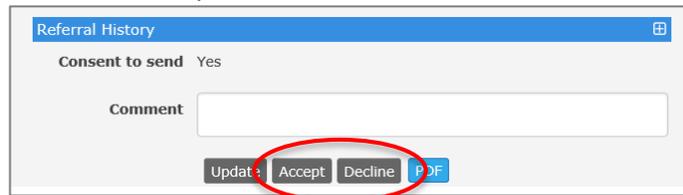
- For referrals from *familychildconnect* online, **Accept** the Referral.

The screenshot shows the 'Attachments' and 'Referral History' interface. The 'Attachments' section shows a table with columns 'File Name' and 'Uploaded'. The first row is 'Referral_2QQQ-45W9.pdf' with '07/03/2017 17:12:51'. Below this is the 'Referral History' section with a 'Comment' field. At the bottom, there are buttons 'Acknowledge', 'Update', 'Accept', and 'DF'. The 'Accept' button is circled in red.

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.

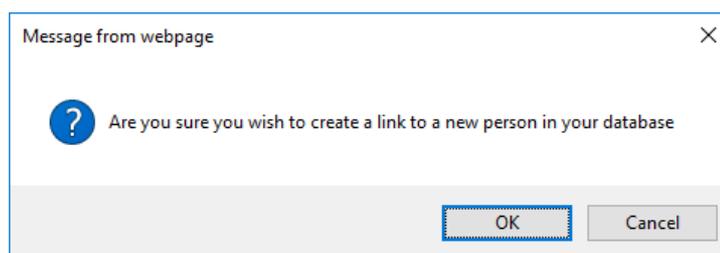


The following message will appear:



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.

IFS Training 1
Advice, Referral and Case Management (ARC) - Training

Home | My List | Team List | My Actions | Team Actions | **Referrals** | Service Directory | Enquiry

Persons | Groups | Days | Cases | Reports | Admin

Received | **Accepted** | Declined | Sent | Draft

Id	Send Date ↓	Status	Sent From	Sent By	Client
206	07/03/2017	Accepted	Hamilton Island FaCC FaCC Training 1	B Coordinator	Carmile Carrot DOB: 02/02/2012 Gender: male

1 to 1 of 1 results

Referral

Referral sent 07/03/2017 17:15:10

Status Accepted

From Hamilton Island FaCC

To Hamilton Island IFS

Service Hamilton Island IFS

Organisation IFS Training 1

For Carmile Carrot

Referred Persons

Additional associated clients	Relationship
Carl Carrot	Father

Details

* Service Type Referred - Intensive Family Support

Attachments

File Name	Uploaded
client_file_2283.pdf	07/03/2017 17:15:10

Referral History

Consent to send Yes

Comment

Update PDF

The referral also shows on the **Person** page, **Referrals** tab – for Carmile and Carl.

IFS Training 1
Carmile Carrot Male, DOB: 02/02/2012 (Age 5 yrs)

Home | Search | Details | Notes | Supports | Alerts | Consent | **Referrals** | Plans | Tasks | Assessments | Documents | Membership

Persons | Groups | Days | Cases | Reports | Admin

Referrals

Create new Referral

Id	Referral Date	Status	From	To
206	07/03/2017	Accepted	Hamilton Island FaCC FaCC Training 1	Hamilton Island IFS IFS Training 1

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.

The screenshot shows a web application interface for managing referrals. The top navigation bar includes 'Home', 'My List', 'Team List', 'My Actions', 'Team Actions', 'Referrals', 'Service Directory', and 'Enquiry'. The left sidebar has a menu with 'Persons', 'Groups', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area displays a 'Referrals' table with columns: Id, Send Date, Status, Sent From, Sent By, and Client. A single row is visible with ID 336, Send Date 01/08/2016 09:52:27, Status 'Waiting', and Client 'Peter Passionfruit'. A blue pencil icon in the 'Id' column is circled in red. To the right, the 'Referral' details panel is open, showing a warning message: 'This external referral is not yet associated with a Person on your database. If you plan to accept this referral you must first create a Person record, or associate the referral with an existing Person.' Below this, there are search fields for 'First' (Peter) and 'Last' (Passionfruit), a 'Fuzzy' checkbox, and a 'Search' button. A message states: 'This person does not appear to be in the database. You might want to make sure by modifying the search criteria. If you are not sure about the spelling try using the % symbol as a wildcard.' Below this is a button 'Add Peter Passionfruit as new Person'. The details panel also shows 'Referral sent 01/08/2016 09:52:27', 'Status: Waiting', 'From: FaCC - UAT Service', 'To: IFS - UAT Service', 'Service: IFS - UAT Service', 'Organisation: IFS - UAT Service organisation', 'For: Peter Passionfruit', 'Referred Persons: Peter Passionfruit, Pamela Passionfruit', 'Details: * Service Type: Referred - Intensive Family Support', 'Attachments: client_file_3145.pdf (01/08/2016 09:52:27)', 'Referral History', 'Consent to send: Yes', and a 'Comment' field. At the bottom of the details panel, the 'Acknowledge' button is circled in red.

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**.

Please select a reason for declining this referral

OK

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

The screenshot shows a 'Referral History' dialog box. It has a 'Consent to send' field, a 'Comment' field, and a 'Reason declined' dropdown menu. The dropdown menu is open, showing a list of reasons: 'No capacity at this time', 'Does not meet eligibility requirements', 'Insufficient information to assess referral', 'Outside catchment area', and 'Other reason for declining referral'. Below the dropdown menu are 'Decline' and 'PDF' buttons. The 'Decline' button is circled in red.

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

The screenshot shows the 'supporting families' web application interface. The top navigation bar includes 'Home', 'My List', 'Team List', 'My Actions', 'Team Actions', 'Referrals', 'Service Directory', and 'Enquiry'. The 'Referrals' tab is active, and the 'Declined' sub-tab is highlighted with a red circle. Below the navigation, there is a table of referrals with columns for Id, Send Date, Status, Sent From, Sent By, and Client. The table shows five entries, all with a status of 'Declined'. To the right of the table, there is a detailed view of a referral, including a 'Link referral to database' section, a search bar for 'Peter Passionfruit', and a 'Referral History' section. The 'Referral History' section shows the referral was sent by 'Worker Two, FaCC - UAT Service' on '01/08/16' at '9:52am Mon'. Below this, it shows the referral was declined by 'Worker Two, IFS - UAT Service' on '02/08/16' at '2:16pm Tue'. The 'Reason declined' is 'Insufficient information to assess referral'. There is also a 'Consent to send' field set to 'Yes' and a 'PDF' button.

Id	Send Date	Status	Sent From	Sent By	Client
336	01/08/2016 09:52:27	Declined	FaCC - UAT Service FaCC - UAT Service organisation	Worker Two	Peter Passionfruit DOB: 20/01/2010 Gender: Male
323	14/07/2016 14:53:53	Declined	FaCC Generic FaCC Generic organisation	Deborah Babulal	Katie Holmes DOB: 12/10/1988 Gender: Female
226	14/06/2016 11:43:05	Declined	FaCC - UAT Service FaCC - UAT Service organisation	Deborah Babulal	Ana Mints DOB: 10/10/1970 Gender: Female
224	14/06/2016 11:42:35	Declined	FaCC - UAT Service FaCC - UAT Service organisation	Deborah Babulal	Lisa Lane DOB: 01/01/1960 Gender: Female
218	14/06/2016 11:11:13	Declined	FaCC - Brisbane Mercy Community Services - Kurbingui	Jeff Mueller	John Doe DOB: 01/01/1960 Gender: Male

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

The screenshot shows the 'Referral History' segment expanded. It displays two entries: 'Referral sent by Worker Two, FaCC - UAT Service' on '01/08/16' at '9:52am Mon' and 'Referral declined by Worker Two, IFS - UAT Service' on '02/08/16' at '2:16pm Tue'. Below the entries, there is a 'Consent to send' field set to 'Yes' and a 'Reason declined' field with the text 'Insufficient information to assess referral'. There is also a 'PDF' button.

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 Infoexchange 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.

The screenshot displays the 'supporting families' interface for a person named Carmine Carrot. The page is titled 'IFS - UAT Service Carmine Carrot Female, DOB: 02/02/1980 (Age 38 yrs)'. The 'Details' tab is selected, showing various sections: Person / Alias, Relationships, Profiles, Cases, Address, Phone & other contacts, and Key Workers. At the bottom of the page, there are three buttons: 'Restriction', 'Export Details', and 'Refresh'. The 'Restriction' button is circled in red.

Name	Primary/Alias	Comments
Carmine Carrot	Primary Name	

Person	Relationship	DOB	Comments
Charles Carrot	Son	04/10/2012	
Carissa Carrot	Daughter	14/04/2006	

Description	Role	Workgroup	Start	Last Update
Carrot Family		IFS - UAT Service	08/05/2018	08/05/2018

Street	Locality	Type	Comments	Last Update
37 Pelican Drive	STANTHORPE QLD 4380	Home		24/04/2018

Contact	Type	Comments	Last Update
4558 9966	Phone (Hm)		08/05/2018

Worker	Workgroup	Role	Comments
Worker Two	IFS - UAT Service	Support worker	

2. The following screen will appear :

User restrictions for Carmine Carrot and all related... ✕

Select users who may NOT view these persons' records.

Select users

Restrictions will apply to:
Carmine Carrot, Carissa Carrot (Daughter), Charles Carrot (Son)

Save Cancel

Note: Coordinator users can always view client records

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

User restrictions for Carmine Carrot and all related... ✕

Select users who may NOT view these persons' records.

norm user A

Note: Coordinator users can always view client records

User restrictions for Carmine Carrot and all related... ✕

Select users who may NOT view these persons' records.

norm user A ✕

Restrictions will apply to:
Carmine Carrot, Carissa Carrot (Daughter), Charles Carrot (Son)

Save Cancel

Note: Coordinator users can always view client records

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:

Message from webpage ✕

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

OK

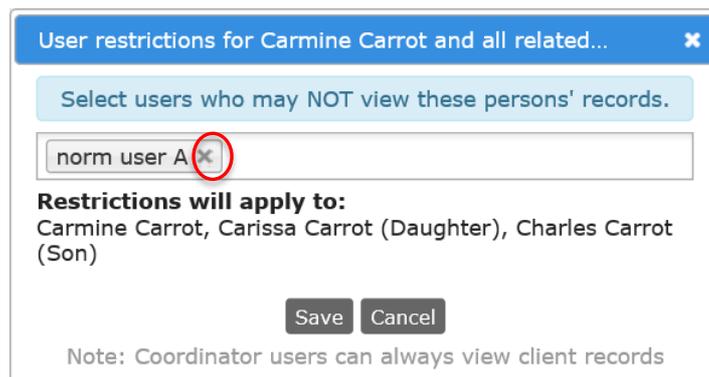
Key points:

- Normal Users can only view lists they have generated. Identifying details and unstructured data is not included in lists run by Normal Users.
- Normal Users 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.

The screenshot shows the 'supporting families' interface for 'Advice, Referral and Case Management (ARC)'. The user is logged in as 'Worker Two (Coordinator)'. The 'Audit' tab is selected, and the 'Person User Restrictions' sub-tab is active. Search filters include 'Start Date' (08/05/2018), 'End Date' (08/05/2018), and 'Person Id' (empty). The 'Worker' dropdown is set to 'Worker Two'. The search results table displays 5 records of restricted access.

Auditlog Id	Workgroup	Cluster	Access	Worker	Restricted Worker	Restricted Client Id	Action	Date Time	Then Restriction Id
1318	IFS - UAT Service	IFS - UAT Service	prohibit	Worker Two	norm user A	7828	added	08/05/2018 10:08:32	404
1317	IFS - UAT Service	IFS - UAT Service	prohibit	Worker Two	norm user A	4237	added	08/05/2018 10:08:32	404
1316	IFS - UAT Service	IFS - UAT Service	prohibit	Worker Two	norm user A	4238	added	08/05/2018 10:08:32	404
1315	IFS - UAT Service	IFS - UAT Service	prohibit	Worker Two	norm user A	4237	added	08/05/2018 10:07:01	96
1314	IFS - UAT Service	IFS - UAT Service	prohibit	Worker Two	norm user A	4238	added	08/05/2018 10:07:01	96

1 to 5 of 5 results

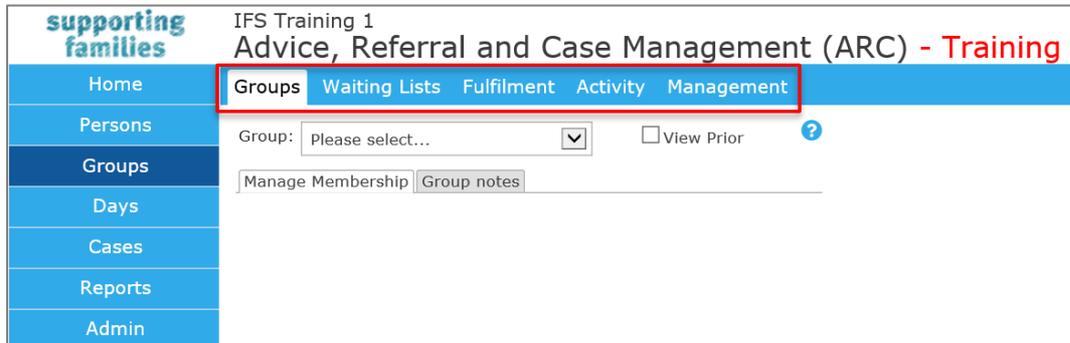
DESCRIPTION: Shows changes made to person user restrictions

NOTE: The Person ID is a unique number assigned by the computer to each person or alias. To determine the Person ID open up the Person Details page and hover your mouse over the person's name in the Person/Alias list. Two numbers (usually the same) will be displayed (separated by a forward slash). The first of those numbers is the Person ID.

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:

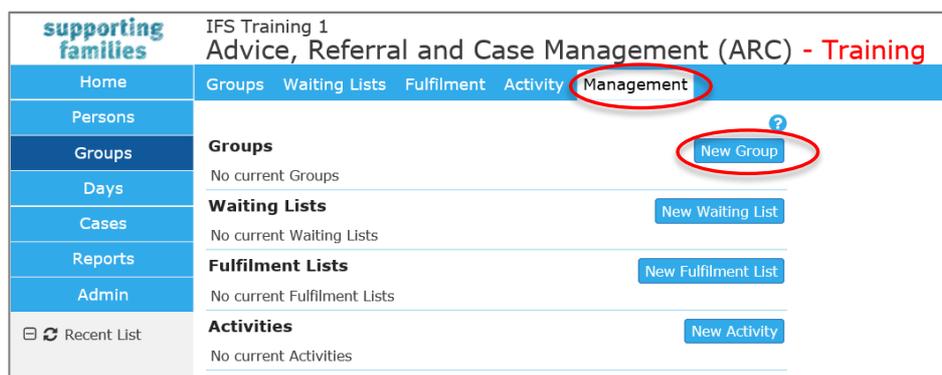


- **Groups:** to manage targeted group sessions delivered by your service. Membership and attendance at groups can be managed and recorded. Group Notes can be created for activities pertaining to the delivery of that group activity, recognizing attendance and capturing worker time spent on these activities. 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**.

Edit Group

* Group / List Name

Sub Group

Description

Nominal Length min

Set Individual Nominal Length Yes No

Maximum Number
The maximum number of persons permitted in the group.

Track Attendance Yes No

Count Others Yes No

* Start Date

End Date

* Current group? Yes No

Last update

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 screenshot shows the 'supporting families' web application interface. The top navigation bar includes 'Home', 'Persons', 'Groups', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area is divided into two sections: a left sidebar with navigation options and a main content area. The main content area is titled 'IFS Training 1 Advice, Referral and Case Management (ARC) - Training' and is currently on the 'Management' tab. The 'Groups' section is active, showing a list of groups. The 'Routines for Household Harmony' group is highlighted with a red circle. The 'Edit Group' form on the right shows the group name, description, start date, and other settings. The group name is 'Routines for Household Harmony', the description is 'Explores life skills for routines, responsibilities and family needs in the household', and the start date is '28/02/2018'. The form also includes options for 'Nominal Length', 'Set Individual Nominal Length', 'Maximum Number', 'Track Attendance', 'Count Others', and 'Attachments'. The 'Current group?' option is set to 'Yes'.

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

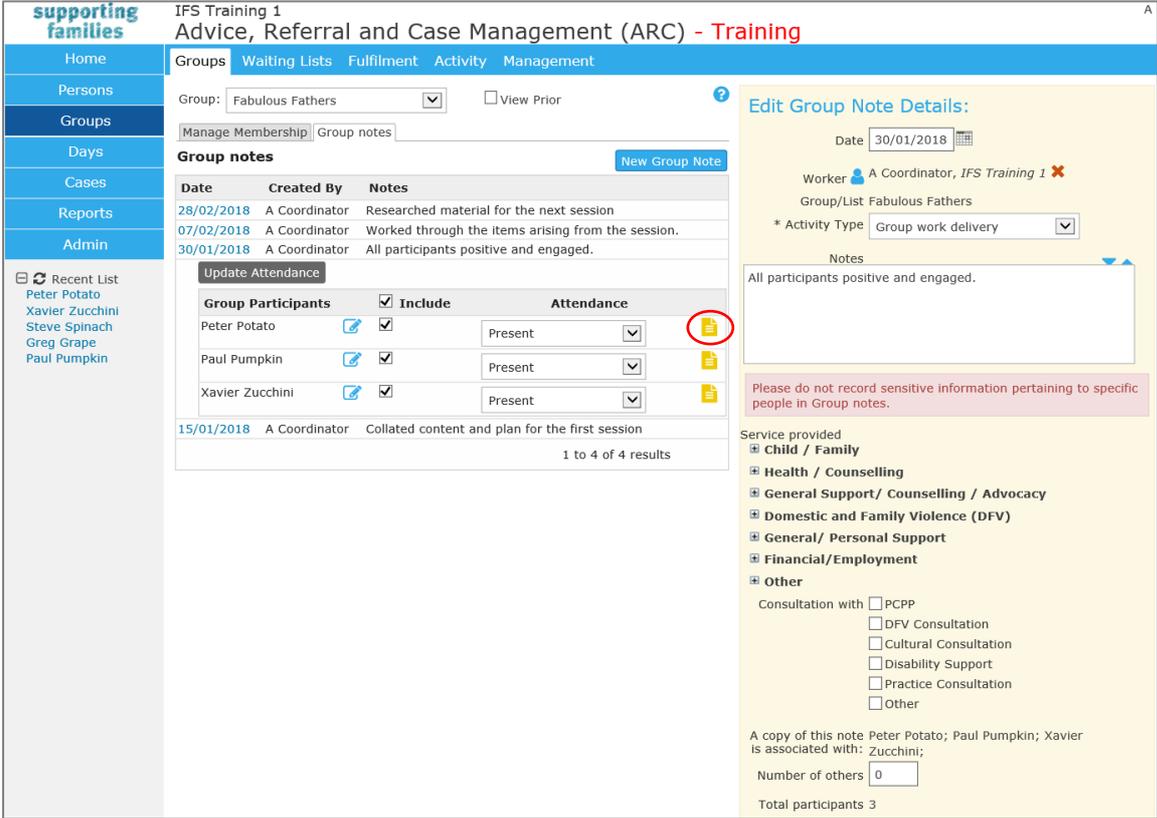
Additional Notes :

- 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.



IFS Training 1
Advice, Referral and Case Management (ARC) - Training

Home | Groups | Waiting Lists | Fulfilment | Activity | Management

Group: Fabulous Fathers View Prior

Manage Membership | Group notes

Group notes [New Group Note](#)

Date	Created By	Notes
28/02/2018	A Coordinator	Researched material for the next session
07/02/2018	A Coordinator	Worked through the items arising from the session.
30/01/2018	A Coordinator	All participants positive and engaged.

[Update Attendance](#)

Group Participants	Include	Attendance
Peter Potato	<input checked="" type="checkbox"/>	Present 
Paul Pumpkin	<input checked="" type="checkbox"/>	Present 
Xavier Zucchini	<input checked="" type="checkbox"/>	Present 

15/01/2018 A Coordinator Collated content and plan for the first session

1 to 4 of 4 results

Edit Group Note Details:

Date: 30/01/2018

Worker: A Coordinator, IFS Training 1

Group/List: Fabulous Fathers

* Activity Type: Group work delivery

Notes: All participants positive and engaged.

Please do not record sensitive information pertaining to specific people in Group notes.

Service provided:

- Child / Family
- Health / Counselling
- General Support/ Counselling / Advocacy
- Domestic and Family Violence (DFV)
- General/ Personal Support
- Financial/Employment
- Other

Consultation with: PCPP, DFV Consultation, Cultural Consultation, Disability Support, Practice Consultation, Other

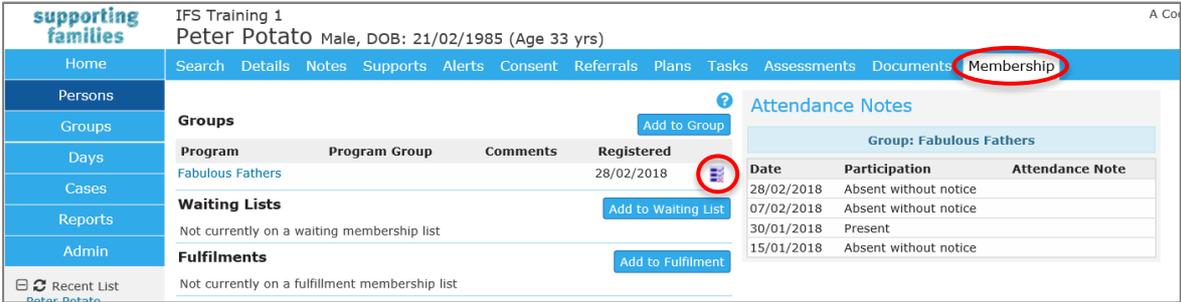
A copy of this note Peter Potato; Paul Pumpkin; Xavier is associated with: Zucchini;

Number of others: 0

Total participants: 3

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

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



IFS Training 1
Peter Potato Male, DOB: 21/02/1985 (Age 33 yrs)

Home | Search | Details | Notes | Supports | Alerts | Consent | Referrals | Plans | Tasks | Assessments | Documents | **Membership**

Attendance Notes

Group: Fabulous Fathers

Date	Participation	Attendance Note
28/02/2018	Absent without notice	
07/02/2018	Absent without notice	
30/01/2018	Present	
15/01/2018	Absent without notice	

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.

Option 1: 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.

Given Name	Family Name	Gender	DOB	Match	
Paul	Pumpkin	male	05/05/1985	3	ADD
Paige	Hahn	female	25/04/1988	4	ADD
Peter	Potato	male	21/02/1985	4	ADD

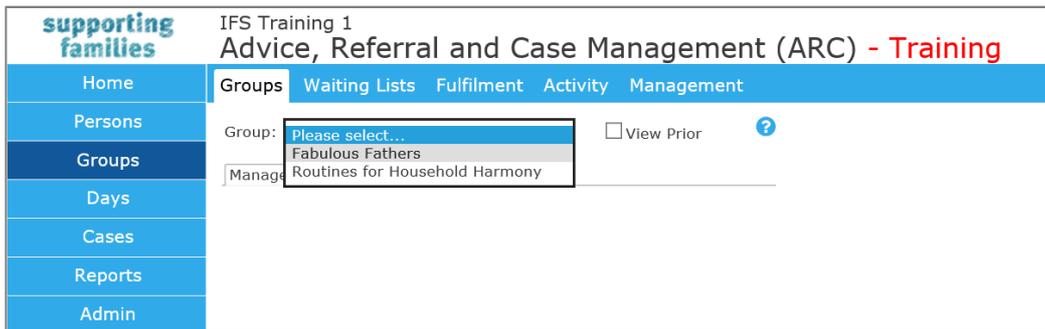
3. Enter any comments for each person, if relevant, and click **Save**. The Person is now listed in Group Members.

#	Given Name	Family Name	Registered		
1	Georgie	Grape	28/02/2018	Edit Membership	Remove
2	Greg	Grape	28/02/2018	Edit Membership	Remove
3	Paul	Pumpkin	28/02/2018	Edit Membership	Remove
4	Pamela	Pumpkin	28/02/2018	Edit Membership	Remove

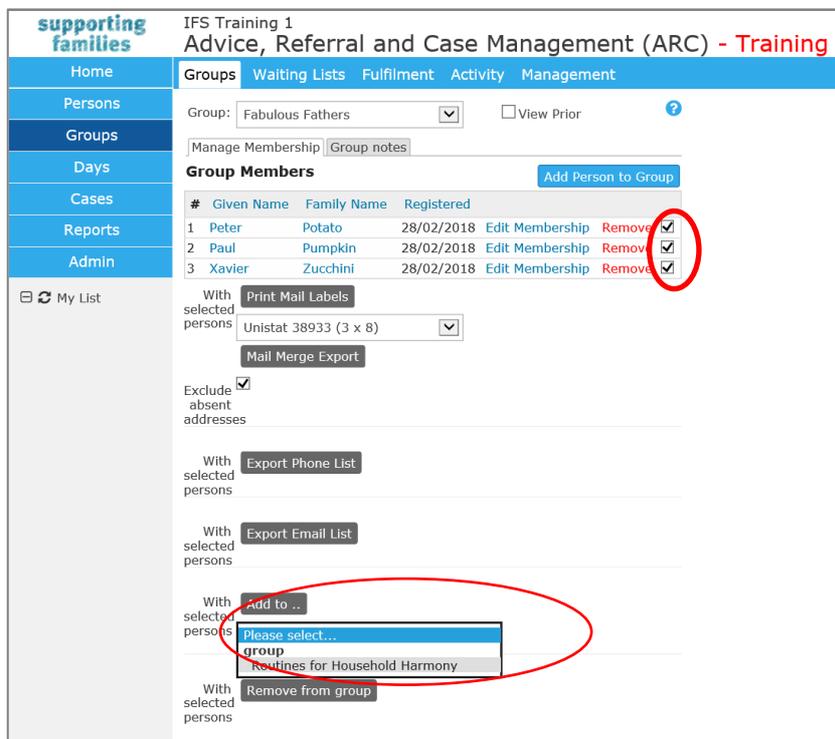
4. Repeat the above steps to add required Persons to the Group.

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

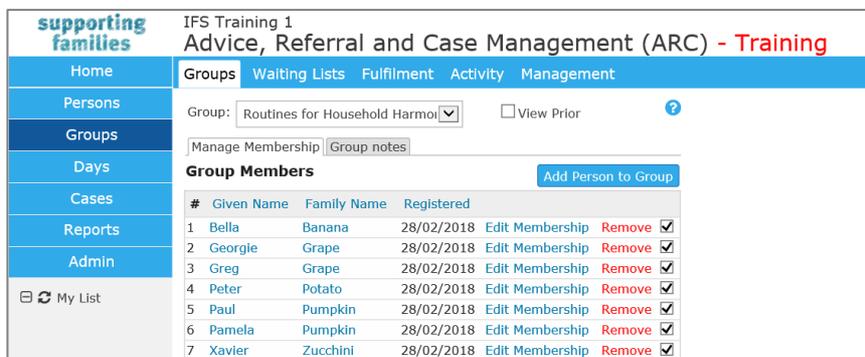
- From the **Groups** tab, select the group you want to copy members from.



- 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.



Option 3: On the Person page, Membership tab

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

The screenshot shows the 'supporting families' interface for a person named Bella Banana. The 'Membership' tab is selected and circled in red. In the 'Groups' section, the 'Add to Group' button is also circled in red. Other buttons include 'Add to Waiting List' and 'Add to Fulfilment'.

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

The 'Group Membership' form is shown. The 'Group' dropdown menu is open, with options: 'Please select...', 'Fabulous Fathers', and 'Routines for Household Harmony'. The 'Comments' field is empty. The 'Registered' date is set to 28/02/2018. The 'Save' button is highlighted.

Registered date defaults to today's date.

The screenshot shows the 'supporting families' interface for a person named Bella Banana. The 'Membership' tab is selected. In the 'Groups' section, the 'Add to Group' button is circled in red. Below it, a table shows the details of the group membership: 'Routines for Household Harmony' with a registered date of 28/02/2018. Other buttons include 'Add to Waiting List' and 'Add to Fulfilment'.

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 bottom of the screen.

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

Home Groups Waiting Lists Fulfilment Activity Management

Persons

Groups

Days

Cases

Reports

Admin

My List

Group: Routines for Household Harmoi View Prior

Manage Membership Group notes

Group Members Add Person to Group

#	Given Name	Family Name	Registered	Edit Membership	Remove	<input type="checkbox"/>
1	Bella	Banana	28/02/2018	Edit Membership	Remove	<input type="checkbox"/>
2	Georgie	Grape	28/02/2018	Edit Membership	Remove	<input type="checkbox"/>
3	Greg	Grape	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
4	Peter	Potato	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
5	Paul	Pumpkin	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
6	Pamela	Pumpkin	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
7	Xavier	Zucchini	28/02/2018	Edit Membership	Remove	<input type="checkbox"/>

With selected persons Print Mail Labels Unistat 38933 (3 x 8) Mail Merge Export

Exclude absent addresses

With selected persons Export Phone List

With selected persons Export Email List

With selected persons Add to .. Please select...

Family name search GO

With selected persons Remove from group

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.

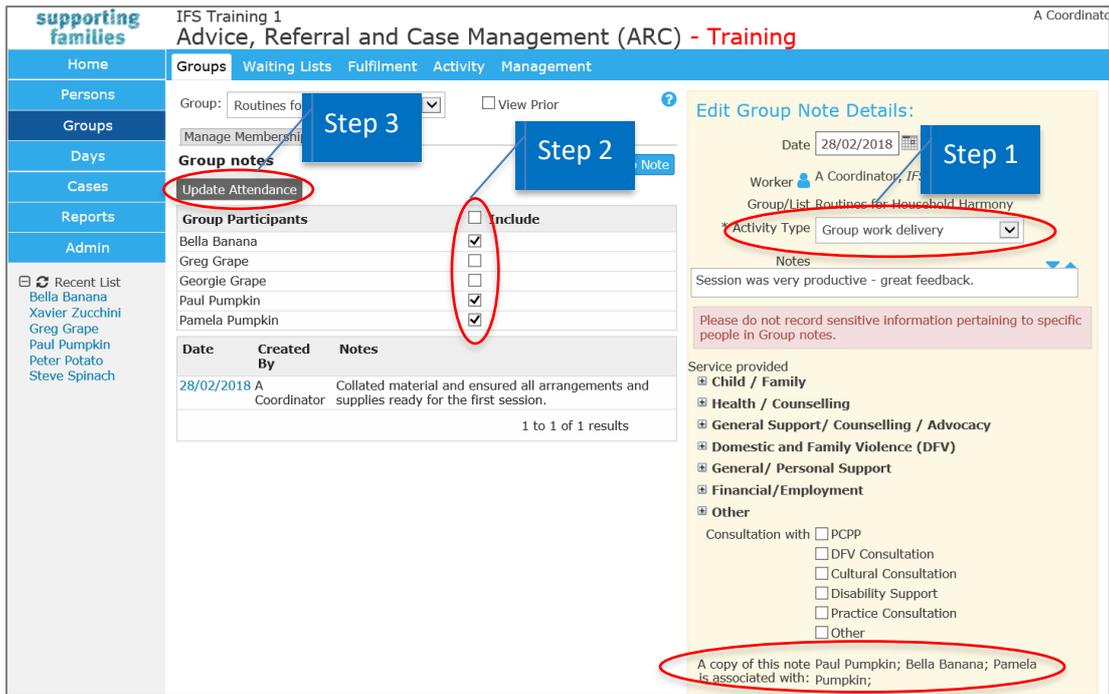
The screenshot shows the 'supporting families' web application interface. The main header is 'IFS Training 1 Advice, Referral and Case Management (ARC) - Training'. The left sidebar contains navigation options: Home, Persons, Groups, Days, Cases, Reports, and Admin. The 'Groups' tab is selected, and the 'Group notes' sub-tab is active. The 'Group' dropdown menu is set to 'Routines for Household Harmony'. The 'Edit Group Note Details' form is displayed, with the following fields and options:

- Date:** 28/02/2018
- Worker:** A Coordinator, IFS Training 1
- Group/List:** Routines for Household Harmony
- * Activity Type:** Group Work (selected), Planning and preparation, Group work delivery, Follow-up activity, Transport for Groups
- Notes:** (Empty text area)
- Service provided:**
 - Child / Family
 - Health / Counselling
 - General Support/ Counselling / Advocacy
 - Domestic and Family Violence (DFV)
 - General/ Personal Support
 - Financial/Employment
 - Other
- Consultation with:**
 - PCPP
 - DFV Consultation
 - Cultural Consultation
 - Disability Support
 - Practice Consultation
 - Other
- A copy of this note is associated with:** No persons selected
- Total participants:** 0
- * Activity Length:** Contact, Case Work, Travel (mins)

Additional elements in the form include a 'Group notes' sub-tab, a 'New Group Note' button, and a table for 'Group Participants' with columns for Name, Date, Created By, and Notes. The table is currently empty.

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, to associate this note with group members:
 - on the left-hand side of the screen, tick the **Include** box for all clients who attended the session
 - then click the **Update Attendance** button.
 Their names will be added to the Group Note and a copy of this Note will appear on their Person record, Notes tab.
- IMPORTANT NOTE:** This must be done prior to saving the Group Note.



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

The following screen will display:

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

Home Groups Waiting Lists Fulfilment Activity Management

Group: Routines for Household Harmony View Prior

Manage Membership Group notes [New Group Note](#)

Date	Created By	Notes
28/02/2018	A Coordinator	Session was very productive - great feedback.
28/02/2018	A Coordinator	Collected material and ensured all arrangements and materials ready for the first session.

1 to 2 of 2 results

Group Participants

Name	Include
Bella Banana	<input checked="" type="checkbox"/>
Paul Pumpkinkin	<input checked="" type="checkbox"/>
Pamela Pumpkinkin	<input checked="" type="checkbox"/>
Greg Grape	<input type="checkbox"/>
Georgie Grape	<input type="checkbox"/>

Update Attendance

Edit Group Note Details:

Date: 28/02/2018

Worker: A Coordinator, IFS Training 1

Group/List: Routines for Household Harmony

* Activity Type: Group work delivery

Notes: Session was very productive - great feedback.

Please do not record sensitive information pertaining to specific people in Group notes.

Service provided:

- Child / Family
- Health / Counselling
- General Support/ Counselling / Advocacy
- Domestic and Family Violence (DFV)
- General/ Personal Support
- Financial/Employment
- Other

Consultation with PCPP

- DFV Consultation
- Cultural Consultation
- Disability Support
- Practice Consultation
- Other

A copy of this note Paul Pumpkinkin; Bella Banana; Pamela is associated with: Pumpkinkin;

Total participants 3

* Activity Length: Contact 60 mins, Case Work, Travel

Family name search GO

Please do not record sensitive information pertaining to specific people in Group notes.

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

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

Home | **Groups** | Waiting Lists | Fulfilment | Activity | Management

Group: Fabulous Fathers View Prior

Manage Membership | Group notes

Group Members [Add Person to Group](#)

Group is under subscribed. (Group has a maximum size of 5 persons).

#	Given Name	Family Name	Registered			
1	Peter	Potato	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
2	Paul	Pumpkin	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
3	Xavier	Zucchini	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>

- Where the Maximum number has been reached

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

Home | **Groups** | Waiting Lists | Fulfilment | Activity | Management

Group: Fabulous Fathers View Prior

Manage Membership | Group notes

Group Members [Add Person to Group](#)

Group is fully subscribed. (Group has a maximum size of 5 persons).

#	Given Name	Family Name	Registered			
1	Greg	Grape	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
2	Peter	Potato	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
3	Paul	Pumpkin	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
4	Steve	Spinach	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
5	Xavier	Zucchini	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>

- Where the Maximum number has been exceeded

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

Home | **Groups** | Waiting Lists | Fulfilment | Activity | Management

Group: Fabulous Fathers View Prior

Manage Membership | Group notes

Group Members [Add Person to Group](#)

Group is over subscribed by 1 person/s.
(Group has a maximum size of 5 persons).

#	Given Name	Family Name	Registered			
1	Blake	Banana	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
2	Greg	Grape	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
3	Peter	Potato	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
4	Paul	Pumpkin	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
5	Steve	Spinach	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>
6	Xavier	Zucchini	28/02/2018	Edit Membership	Remove	<input checked="" type="checkbox"/>

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

- 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.
- Complete as outlined in the Persons section and complete the record accordingly.

- 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.

The screenshot shows the 'supporting families' interface for a person record. The 'Documents' tab is selected, and the 'Create New Document' button is highlighted with a red circle. The 'Edit Document Details' form is open, showing the following fields and options:

- Date: 29/01/2019
- Bring Up: [calendar icon]
- Worker/s: A Coordinator, IFS Training 1
- Document Type: Attachment
- Document Type: [dropdown menu]
- Case Summary: Potato Family (29/01/2019 - current)
- Description: [text area]

Below the form, there is a table showing records associated with the document:

Name	Relationship	Associate record with:
Pamela Potato	Mother	<input type="checkbox"/>
Percy Potato	Brother	<input type="checkbox"/>

At the bottom, there are 'Save' and 'Save Final' buttons.

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:

The screenshot shows a dropdown menu for the 'Type' field. The options are:

- Referral
- Assessment
- Other

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

The screenshot shows the 'supporting families' interface for Peter Potato. The 'Documents' tab is active, displaying a table with one document entry: Date 29/01/2019, Worker A Coordinator, Document Type Attachment, and Description Bowen State School Report 2018. The 'Edit Document Details' form on the right includes fields for Date (29/01/2019), Bring Up, Worker/s (A Coordinator, IFS Training 1), Document Type (Attachment), Document (with a circled 'Select File...' button), Type (Other), Case Summary (Potato Family (29/01/2019 - current)), and Description (Bowen State School Report 2018). Below the form is a table for 'This document is associated with (tick):' with columns for Name, Relationship, and Associate record with. The table lists Pamela Potato (Mother) and Percy Potato (Brother), both with unchecked boxes. At the bottom, there are 'Save', 'Delete', and 'Save Final' buttons.

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

The screenshot shows an Internet Explorer window titled 'Load File - Internet Explorer' with the URL 'https://srs-qld-families-training.infochangeapps.net.au/loaddoc.php?notesid=821&doctype=Attachment'. The main content area is titled 'Upload File' and features the 'supporting families' logo. It contains a 'Select File' text box, a 'Browse...' button, and '(Max File Size: 5 MB)'. Below these are 'Upload File' and 'Cancel' buttons. An 'Instructions' section lists:

- First select the file to load to the server using the browse button.
- Once the file has been selected, click 'Upload File' to load to server.
- You will receive a confirmation when the action has been completed.

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 immediately.

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**.

Document Details

Date 29/01/2019

Bring Up

Worker/s A Coordinator, IFS Training 1

Work group IFS Training 1

Type Attachment

Type Other

Case Summary Potato Family

Document Name Bowen State School Report.docx

Description
Bowen State School Report 2018

Last update A Coordinator, IFS Training 1
29/01/2019 10:58:05 AEST

Edit locked 29/01/2019 
[View Document](#)

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

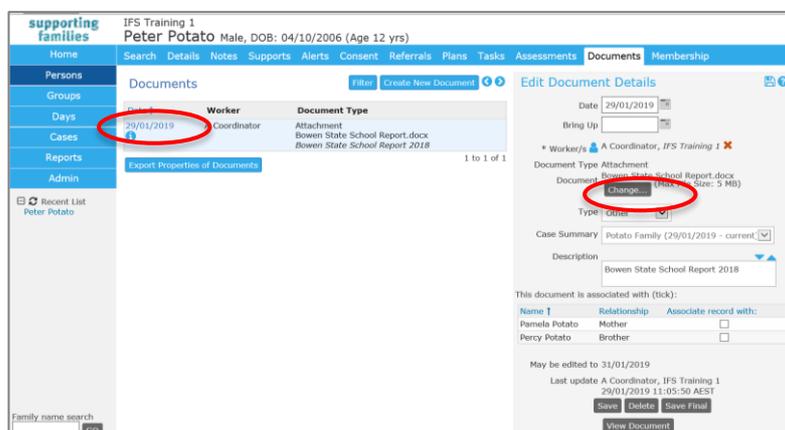
If you wish to make any changes to this document ensure you save them by going File > Save As and choose a location (not in the windows temp directory) You will then need to upload the document to SRS if you wish to keep the latest copy on record.

[OK](#)

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.



The screenshot shows the 'supporting families' interface for user 'IFS Training 1' viewing the profile of 'Peter Potato'. The 'Documents' tab is active, displaying a table with one document record. The date '29/01/2019' in the table is highlighted in blue. To the right, the 'Edit Document Details' form is open, showing the document's metadata. The 'Change...' button is highlighted in red.

Worker	Document Type
29/01/2019 Coordinator	Attachment Bowen State School Report.docx Bowen State School Report 2018

Edit Document Details

Date: 29/01/2019

Bring Up: [dropdown]

Worker/s: A Coordinator, IFS Training 1

Document Type: Attachment

Document: Bowen State School Report.docx (Size: 5 MB)

Type: Other

Case Summary: Potato Family (29/01/2019 - current)

Description: Bowen State School Report 2018

This document is associated with (tick):

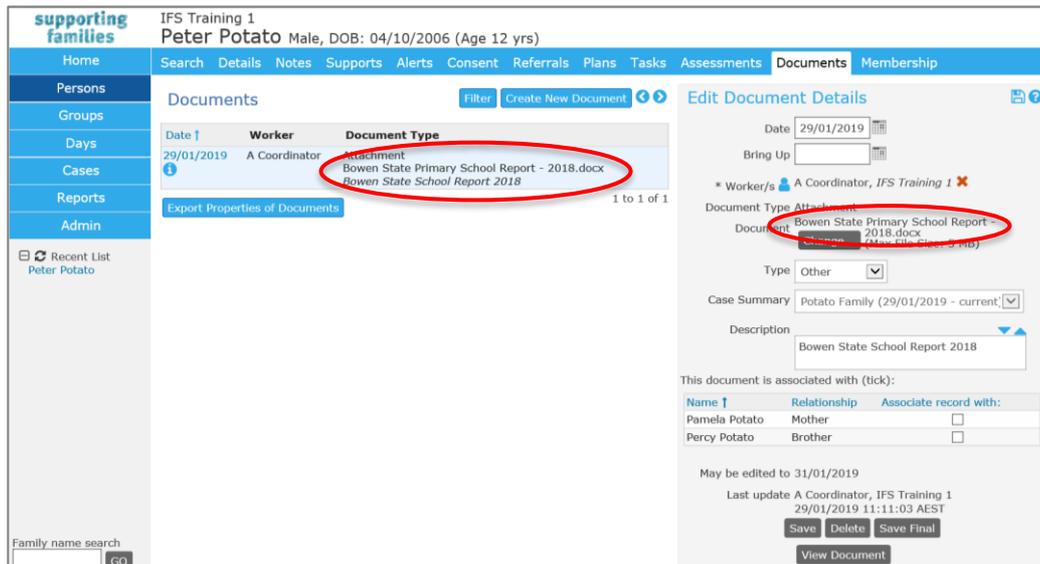
Name	Relationship	Associate record with:
Pamela Potato	Mother	<input type="checkbox"/>
Percy Potato	Brother	<input type="checkbox"/>

May be edited to 31/01/2019

Last update: A Coordinator, IFS Training 1
29/01/2019 11:05:50 AEST

Buttons: Save, Delete, Save Final, View Document

- 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.
- 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 object and save.
2. The option to attach a document will appear:

The image displays three screenshots of web forms, each with a red circle highlighting the 'Attach Document' button. The first screenshot is 'Edit Note Details', the second is 'Edit Support/Brokerage Details', and the third is 'Edit Review Details'. Each form includes fields for date, worker information, activity type, case summary, and various checkboxes for service types. The 'Attach Document' button is located at the bottom of each form, with a note below it stating 'There are no files associated with this document. To upload, click the upload button or in newer browsers drag and drop files here.' The 'Edit Review Details' form also includes a 'Comments' section and a table for associated records.

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

The screenshot shows the 'supporting families' logo and the page title 'IFS Training 2 Advice, Referral and Case Management (ARC) - Training'. The navigation bar includes 'Home', 'Reports', 'Lists', 'Financial', 'Referrals', 'Groups', 'Custom', and 'Results'. The 'Reports' tab is circled in red. Below the navigation bar, there are several dropdown menus: 'Workgroup' (IFS Training 2), 'Report type' (Please select), 'Include in report' (Please select), 'Period of Interest', 'Start date', and 'End date'. The 'Include in report' dropdown is open, showing a list of report types: 'Please select', 'Demographic Report', 'Profile Report', 'Contact Report', 'Family Report (using relationships)', 'Plan Report', 'Group Report', 'ARC Demographics Report', 'ARC Performance Report', 'Contract Report (IFS)', and 'Service Hours by Worker / by Case'. The 'Service Hours by Worker / by Case' option is highlighted with a red box.

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**

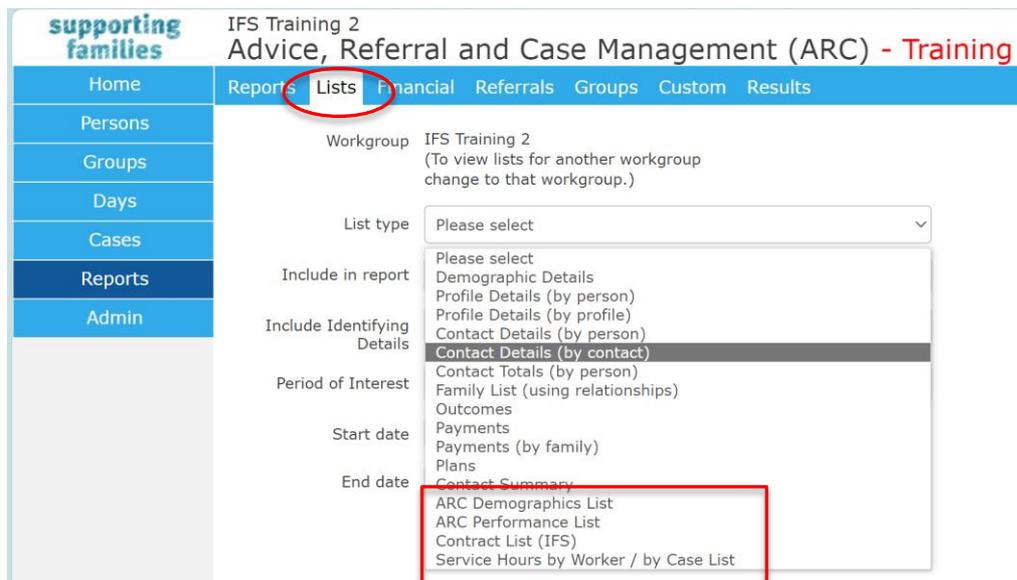
This report allows services to run accurate reports/lists for individual workers hours and to perform case reviews.

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.

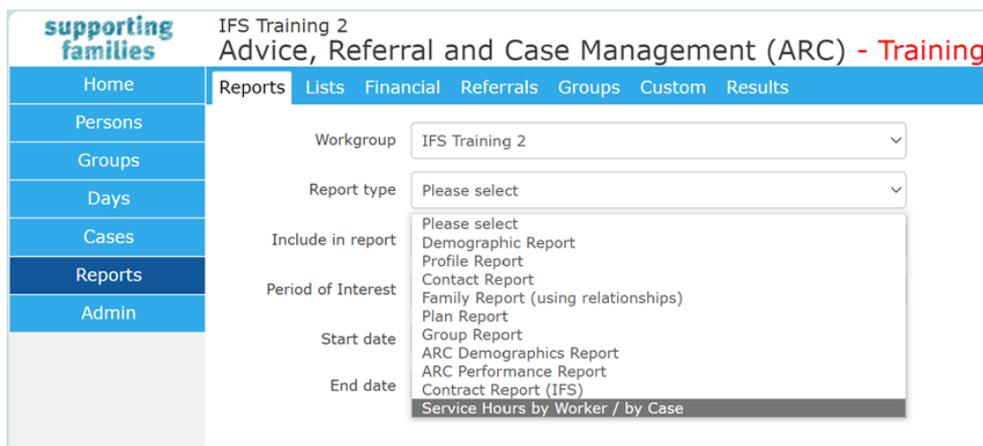
17.1.5 Custom tab

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**.



supporting families IFS Training 2
Advice, Referral and Case Management (ARC) - Training

Home Reports Lists Financial Referrals Groups Custom Results

Persons
Groups
Days
Cases
Reports
Admin

Workgroup IFS Training 2

Report type Please select

Include in report Please select
Demographic Report
Profile Report
Contact Report
Family Report (using relationships)
Plan Report
Group Report
ARC Demographics Report
ARC Performance Report
Contract Report (IFS)
Service Hours by Worker / by Case

Period of Interest

Start date

End date

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.



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

Home Reports Lists Financial Referrals Groups Custom Results

Persons
Groups
Days
Cases
Reports
Admin

Report type ARC Performance Report

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

Start date

End date

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

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

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).

Report/List ID	Run By	Processing Time	Date Range	Workgroup	Type	Included persons / Report Title	Actions
Report 1938 28/02/2018 15:35	A Coordinator	28/02/2018 15:35 0.736557 secs	From: 01/02/2018 To: 28/02/2018	IFS Training 1	ARC Performance Report		Delete Report View Report
List 1939 28/02/2018 15:37	A Coordinator	28/02/2018 15:37 0.451875 secs	From: 01/02/2018 To: 28/02/2018	IFS Training 1	ARC Performance List		Delete List View List
Report 1941 28/02/2018 15:37	A Coordinator	28/02/2018 15:37 0.404161 secs	From: 01/02/2018 To: 28/02/2018	IFS Training 1	OASIS Report		Delete Report View Report
List 1942 28/02/2018 15:38	A Coordinator	28/02/2018 15:38 0.411384 secs	From: 01/02/2018 To: 28/02/2018	IFS Training 1	OASIS List		Delete List View List

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

supporting families IFS Training 1 A Coordinator (Coordinator)

Advice, Referral and Case Management (ARC) - Training

Home Reports Lists Financial Referrals Groups Custom Results Menu

Persons Back to Report Results List Delete this Report

Groups

Days

Cases

Reports

Admin

ARC PERFORMANCE REPORT (IFS)

Report Information	
Service Name	IFS Training 1
Service Outlet Number	17
Organisation Name	
Service Type No	T327
Service Type	Intensive Family Support
Service Type Name	Support - Intensive Family Support
Reporting Period Start Date	01/02/2018
Reporting Period End Date	28/02/2018

INTENSIVE FAMILY SUPPORT PERFORMANCE MEASURES

ENQUIRIES (Non Case Activity)

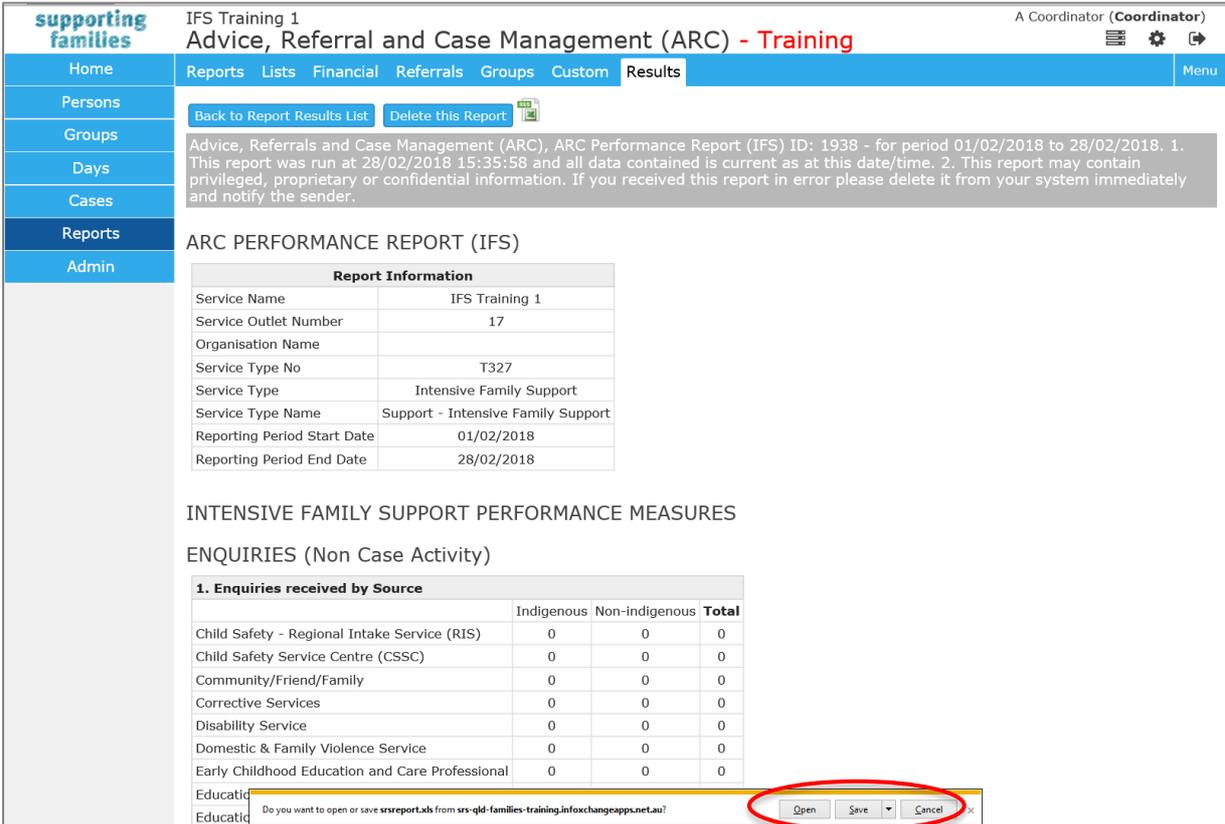
1. Enquiries received by Source			
	Indigenous	Non-indigenous	Total
Child Safety - Regional Intake Service (RIS)	0	0	0
Child Safety Service Centre (CSSC)	0	0	0
Community/Friend/Family	0	0	0

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**



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

Home Reports Lists Financial Referrals Groups Custom Results Menu

Persons Back to Report Results List Delete this Report

Groups

Days

Cases

Reports

Admin

ARC PERFORMANCE REPORT (IFS)

Report Information	
Service Name	IFS Training 1
Service Outlet Number	17
Organisation Name	
Service Type No	T327
Service Type	Intensive Family Support
Service Type Name	Support - Intensive Family Support
Reporting Period Start Date	01/02/2018
Reporting Period End Date	28/02/2018

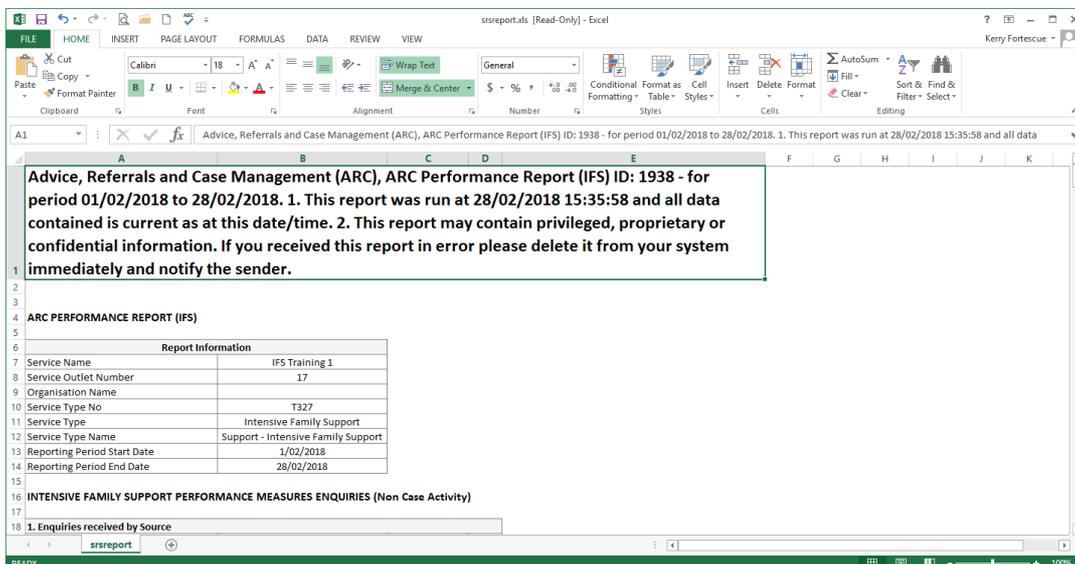
INTENSIVE FAMILY SUPPORT PERFORMANCE MEASURES ENQUIRIES (Non Case Activity)

1. Enquiries received by Source			
	Indigenous	Non-indigenous	Total
Child Safety - Regional Intake Service (RIS)	0	0	0
Child Safety Service Centre (CSSC)	0	0	0
Community/Friend/Family	0	0	0
Corrective Services	0	0	0
Disability Service	0	0	0
Domestic & Family Violence Service	0	0	0
Early Childhood Education and Care Professional	0	0	0
Educational			
Educational			

Do you want to open or save srsreport.xls from srs-qld-families-training.infochangeapps.net.au?

Open Save Cancel

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



srsreport.xls [Read-Only] - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Calibri 18 A A Wrap Text General Conditional Formatting Table Styles Cell Styles Insert Delete Format AutoSum Fill Sort & Find & Filter Select Clear

A1 : Advice, Referrals and Case Management (ARC), ARC Performance Report (IFS) ID: 1938 - for period 01/02/2018 to 28/02/2018. 1. This report was run at 28/02/2018 15:35:58 and all data

A B C D E F G H I J K

1 Advice, Referrals and Case Management (ARC), ARC Performance Report (IFS) ID: 1938 - for period 01/02/2018 to 28/02/2018. 1. This report was run at 28/02/2018 15:35:58 and all data contained is current as at this date/time. 2. This report may contain privileged, proprietary or confidential information. If you received this report in error please delete it from your system immediately and notify the sender.

2

3

4 ARC PERFORMANCE REPORT (IFS)

5

6 Report Information

7 Service Name IFS Training 1

8 Service Outlet Number 17

9 Organisation Name

10 Service Type No T327

11 Service Type Intensive Family Support

12 Service Type Name Support - Intensive Family Support

13 Reporting Period Start Date 1/02/2018

14 Reporting Period End Date 28/02/2018

15

16 INTENSIVE FAMILY SUPPORT PERFORMANCE MEASURES ENQUIRIES (Non Case Activity)

17

18 1. Enquiries received by Source

srsreport

READY

18 Admin Page

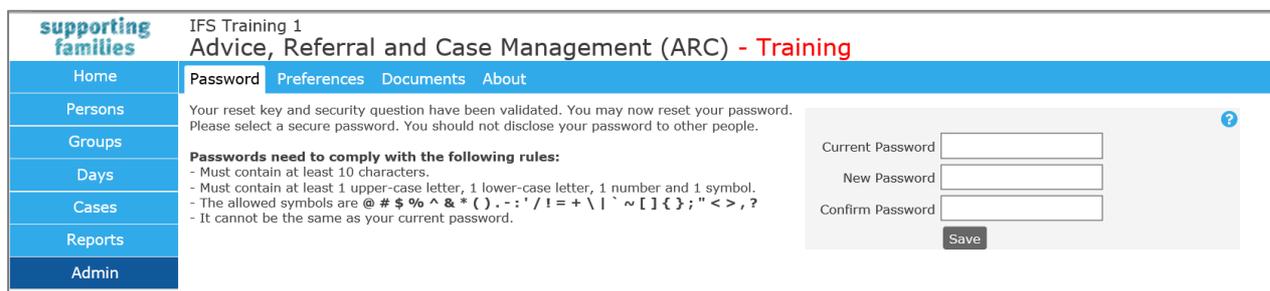
The tabs within the **Admin** page allow users to manage their logon, email address and other details used within ARC.

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:



The screenshot shows the 'supporting families' interface. The top navigation bar includes 'Home', 'Password', 'Preferences', 'Documents', and 'About'. The 'Password' tab is active. The main content area displays a message: 'Your reset key and security question have been validated. You may now reset your password. Please select a secure password. You should not disclose your password to other people.' Below this, a section titled 'Passwords need to comply with the following rules:' lists requirements: at least 10 characters, 1 upper-case letter, 1 lower-case letter, 1 number, and 1 symbol. It also lists allowed symbols: @ # \$ % ^ & * () . - : ' / ! = + \ | ` ~ [] { } ; " < > , ? and states it cannot be the same as the current password. To the right, there are three input fields labeled 'Current Password', 'New Password', and 'Confirm Password', followed by a 'Save' button. A help icon (?) is visible in the top right of the form area.

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 Password Preferences Documents About

Persons
Groups
Days
Cases
Reports
Admin

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

* 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.

supporting families		IFS Training 1 Advice, Referral and Case Management (ARC) - Training											
Home	Password	Preferences	Documents	Finance	Bulk Actions	Users	Merge	Audit	Templates	Reference Data	About		
Persons													
Groups	Document List												
Days	Document Name ↓	Version	Description						Start Date				
Cases	Wellbeing Domains Assessment											21/09/2017	
Reports	SDM Wheels for FAST											1	01/07/2019
Admin	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**.

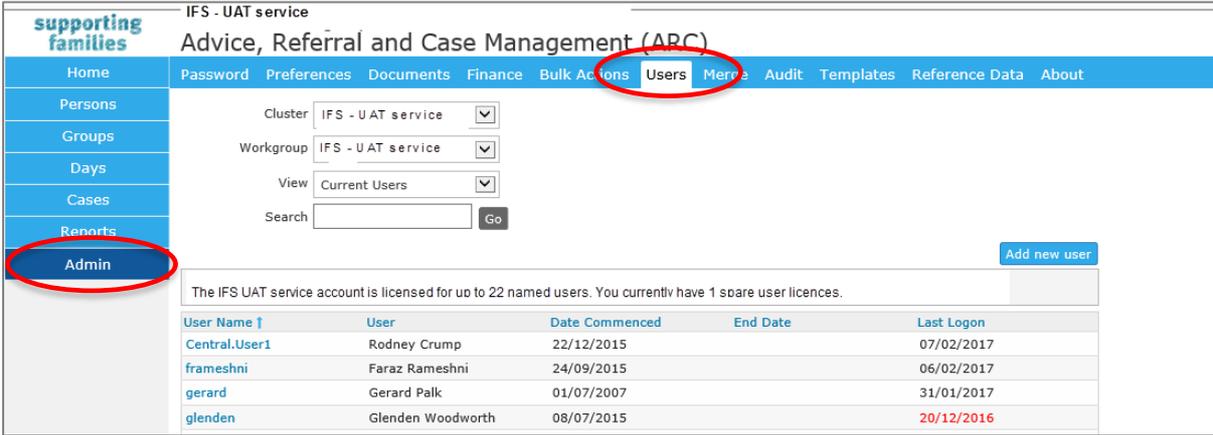
Please contact childandfamilycommissioning@dcssds.qld.gov.au if you would like additional documents available.

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.



The screenshot displays the 'supporting families' interface for 'IFS - UAT service'. The page title is 'Advice, Referral and Case Management (ARC)'. The left sidebar has 'Admin' highlighted. The top navigation bar has 'Users' highlighted. The main content area includes filters for Cluster (IFS - UAT service), Workgroup (IFS - UAT service), and View (Current Users). A search box and 'Go' button are present. An 'Add new user' button is in the top right. A message states: 'The IFS UAT service account is licensed for up to 22 named users. You currently have 1 spare user licences.' Below this is a table of users:

User Name ↑	User	Date Commenced	End Date	Last Logon
Central.User1	Rodney Crump	22/12/2015		07/02/2017
frameshni	Faraz Rameshni	24/09/2015		06/02/2017
gerard	Gerard Palk	01/07/2007		31/01/2017
glenden	Glenden Woodworth	08/07/2015		20/12/2016

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

The screenshot shows the 'Users' management interface for the IFS UAT service. The 'Add new user' button is highlighted with a red circle. Below the button is a table of existing users:

User Name	User	Date Commenced	End Date	Last Logon
Central.User1	Rodney Crump	22/12/2015		07/02/2017
frameshni	Faraz Rameshni	24/09/2015		06/02/2017
gerard	Gerard Palk	01/07/2007		31/01/2017
glenden	Glenden Woodworth	08/07/2015		20/12/2016
michelle.hollywood	Michelle Hollywood	23/06/2015		25/10/2016
simon.hendry	Simon Hendry	02/07/2015		02/07/2015
trish	Trish Anderson	26/11/2015		21/12/2016

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 not ticked.
6. Tick the **Change Password** checkbox - this will force the user to change their password when they first log into ARC.
7. Click **Save**. The User account has been saved but there is a warning that the user has not been allocated to any Workgroup.

The 'Edit user record' form shows the following details:

- * User Name: Barry.Banana
- * First Name: Barry
- * Last Name: Banana
- Email Address: [Empty]
- * Default Cluster: IFS - UAT Service
- Start Date: 13/02/2017
- New Password: [Empty]
- Confirm Password: [Empty]
- User Blocked:
- Change password:

A yellow warning box at the bottom states: "A new user has been created. You must now add them to a workgroup to complete the process." Below this, there is a dropdown menu for 'Add to workgroup' (Please select...) and a 'Last Update' timestamp: Worker Two, IFS - UAT Service, 13/02/2017 16:44:27. At the bottom are 'Save' and 'Remove User' buttons.

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**.

The screenshot shows the 'Edit user record' form with the following fields and values:

- * User Name: Barry.Banana
- * First Name: Barry
- * Last Name: Banana
- Email Address: (empty)
- * Default Cluster: IFS - UAT Service
- Start Date: 13/02/2017
- New Password: (empty)
- Confirm Password: (empty)
- User Blocked:
- Change password:

A yellow message box states: "A new user has been created. You must now add them to a workgroup to complete the process." Below this, the 'Add to workgroup' dropdown menu is highlighted with a red box and shows 'IFS - UAT Service' selected. At the bottom, there are 'Save' and 'Remove User' buttons.

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.

The screenshot shows the 'Edit user record' form with an error message at the top, highlighted with a red box: "Sorry, you have reached your user limit. Please remove non-current users or contact Infoxchange to negotiate your user license arrangements." Below the error message, the form fields are partially visible:

- * User Name: Don.Bradnam
- * First Name: Don
- * Last Name: Bradman
- Email Address: (empty)

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.

The screenshot shows the 'Edit user record' form for a user named Barry.Banana. The form includes fields for User Name, First Name, Last Name, Email Address, Default Cluster, and Start Date. The 'New Password' and 'Confirm Password' fields are highlighted with a red box. The 'Change password' checkbox is also highlighted with a red oval. Below these fields, there is a table with columns for Workgroup, Role, and Operational Remove. The table shows the user is in the 'IFS - UAT Service' workgroup with a 'Normal User' role. The 'Operational Remove' checkbox is checked. There is also a 'Save' button at the bottom.

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

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 screenshot shows the 'Edit user record' form for a user named Barry.Banana. The 'User Blocked' checkbox is highlighted with a red oval. The 'Change password' checkbox is unchecked. Below these fields, there is a table with columns for Workgroup, Role, and Operational Remove. The table shows the user is in the 'IFS - UAT Service' workgroup with a 'Normal User' role. The 'Operational Remove' checkbox is checked. There is also a 'Save' button at the bottom.

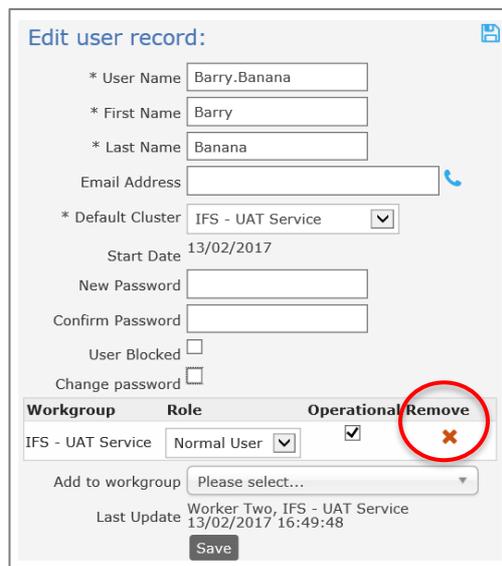
The user account can be unblocked by simply unchecking the **User Blocked** check box (highlighted above) and clicking **Save**.

19.1.4 Removing User Access

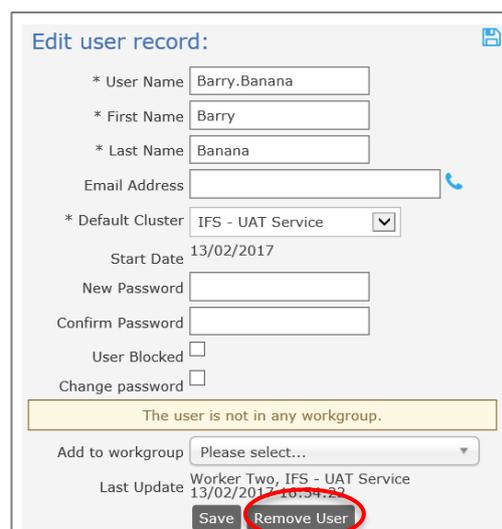
When a staff member leaves your service, you have a choice as to how you manage their User record within ARC. The steps outlined below address the User management functions – all records made by this User within ARC are retained.

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'.



The screenshot shows the 'Edit user record' form for a user named Barry.Banana. The form includes fields for User Name, First Name, Last Name, Email Address, Default Cluster, Start Date, New Password, Confirm Password, User Blocked, and Change password. Below these fields is a table with columns for Workgroup, Role, Operational, and Remove. The 'Remove' column contains a red 'X' icon, which is circled in red. The 'Operational' column has a checked checkbox. The 'Add to workgroup' dropdown is set to 'Please select...'. The 'Last Update' field shows 'Worker Two, IFS - UAT Service' on '13/02/2017 16:49:48'. A 'Save' button is at the bottom.



The screenshot shows the 'Edit user record' form for the same user. The 'Remove' button is no longer visible. Instead, a yellow message box states 'The user is not in any workgroup.' The 'Add to workgroup' dropdown is still 'Please select...'. The 'Last Update' field shows 'Worker Two, IFS - UAT Service' on '13/02/2017 16:49:48'. A 'Save' button and a 'Remove User' button are at the bottom, with the 'Remove User' button circled in red.

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.

supporting families IFS Training 1 Advice, Referral and Case Management (ARC) - Training B Coordinator (Coordinator)

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

Persons Merge Persons Search Duplicates

Groups Search for duplicate persons records:

Days Match Threshold 5 Records 50 Search Clear

Cases Search Result 3 [Possible Match]

Reports 4

Admin 5

6 [Exact Match]

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

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

To perform the possible duplicates search:

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

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

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

Persons Merge Persons Search Duplicates

Groups Search for duplicate persons records:

Days Match Threshold 3 [Possible Match] Records 50 Search Clear

Cases Search Results: Potential Duplicates: 1

View	Person ID	Given Name	Family Name	DOB	Alias?	View	Person ID	Given Name	Family Name	DOB	Alias?	Match	Merge
	6378	Alan	Robinhood	20/01/1990			6379	Alan	Robinhood	20/01/1990		6	Select

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

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

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

3. Click on the 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.

ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Actions
2275	Alan	Robinhood	M	20/01/2010	0	0	Open Select
2277	Robert	Robinhood	M	02/08/1990	0	0	Open Select
2283	Allan	Robinhood	M	20/01/2001	0	0	Open Select

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

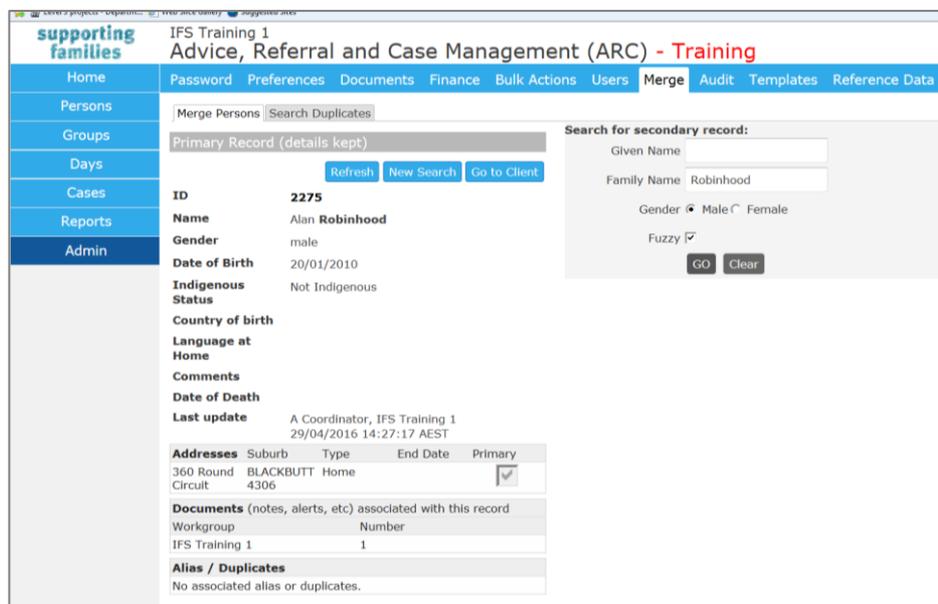
Note: You can obtain the **Person ID** by holding the mouse over the client's name in the Person **Details** tab (see image below). The first number is the Person ID, the second number (if different) is the alias record ID. In the example below, the **Person ID** is '2275' and the **Alias ID** is '2275'.

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.



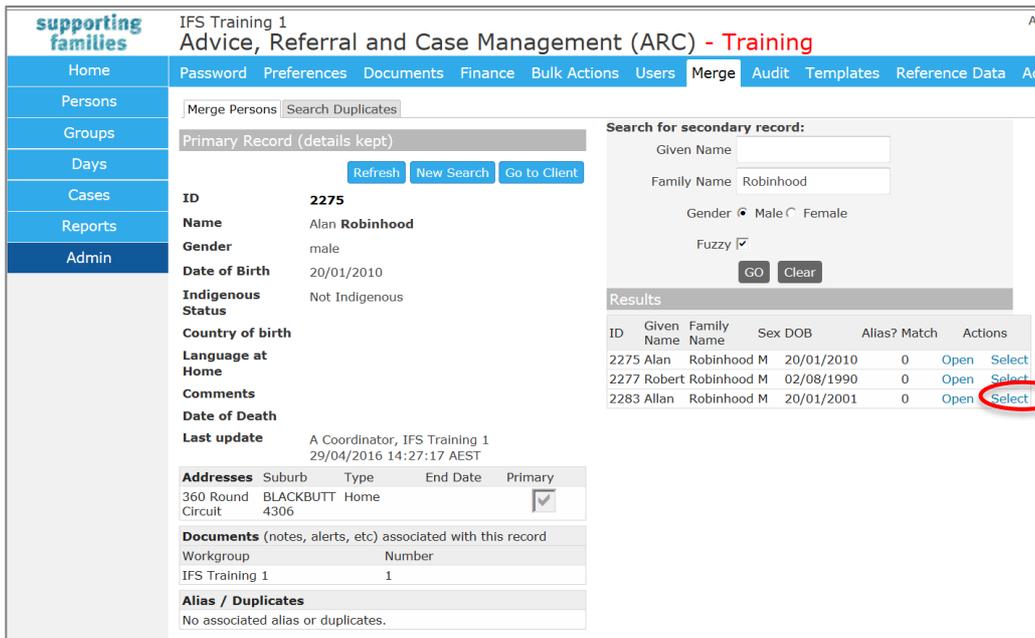
When you have finished reviewing the record close the tab and return to the **Merge** tab.

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



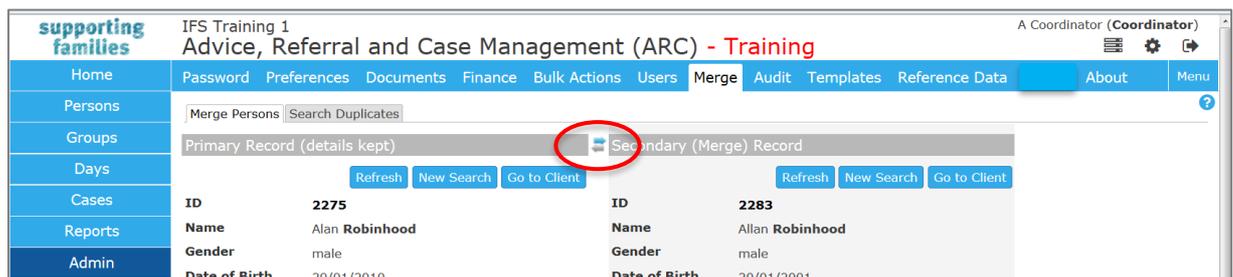
If you need to modify any details on the primary person record, you can click the **Go to Client** button (see image above) to open the client's **Person Details** tab in another browser tab. Once you have saved any changes in the **Person Details** tab, switch back to the current Merge process and click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

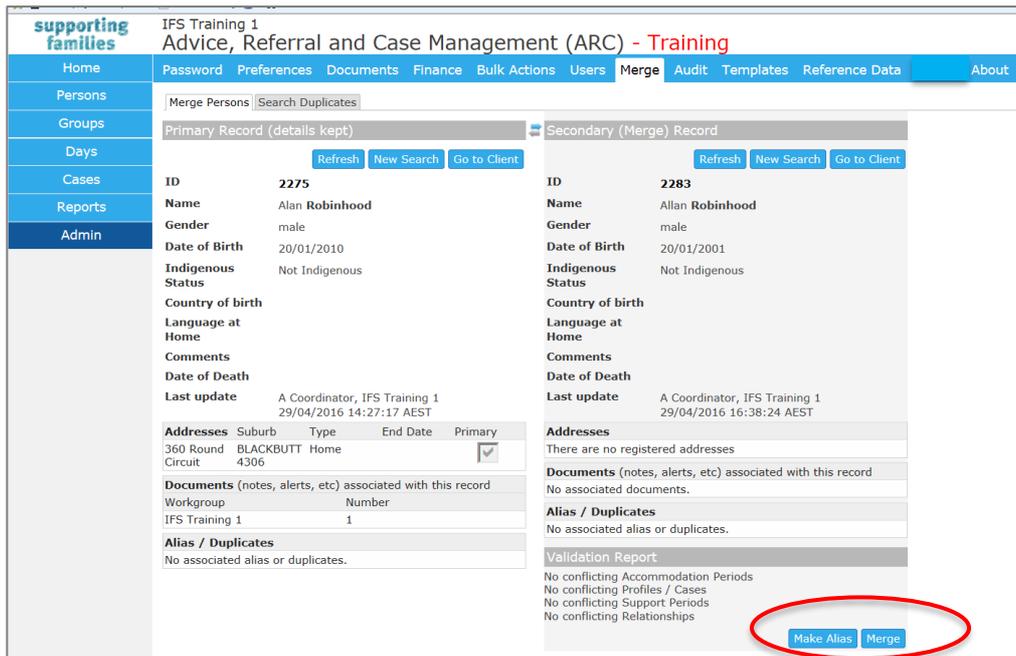


If you need to modify any details on the secondary person record, you can click the **Go to Client** button to open the client's Person Details tab in another browser tab. Once you have saved any changes in the Person Details tab, switch back to the current Merge process and click the **Refresh** button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

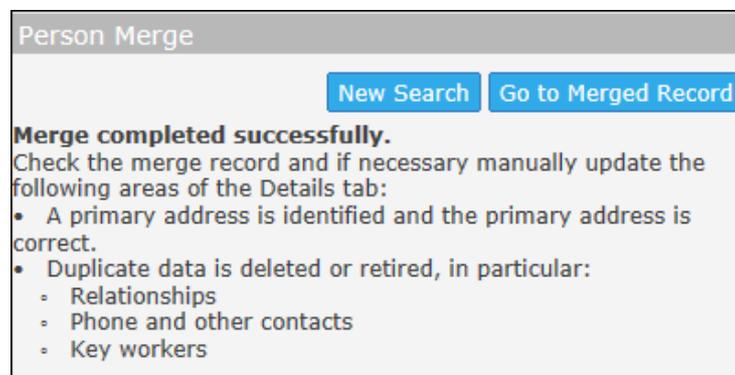
- Carefully consider both records to ensure they relate to the same client.
Note: in addition to merging the records, clicking **Make Alias** will also create an Alias record from the name and gender details of the secondary person record. For example, the **Make Alias** function would be used if you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



- 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.

The screenshot shows the 'supporting families' web application interface. The main header is 'IFS Training 1 Advice, Referral and Case Management (ARC) - Training'. The navigation menu includes Home, Persons, Groups, Days, Cases, Surveys, Reports, and Admin. The 'Merge' tab is active, showing a 'Person Merge' section with a 'Merge completed successfully' message. Below this, there are instructions to check the merge record and update details. The 'Alias / Duplicates' table lists a record for John Dough with an 'Undo Merge ID(5)' link circled in red.

ID	Given Name	Family Name	Alias/Duplicate	Last Update
2262	John	Do	H Coordinator;0 IFS Training 1	13/01/2016 10:46:39 AEST

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.

IFS Training 1
Advice, Referral and Case Management (ARC) - Training

A Coordinator (Coordinator)

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

Persons **Person Views** Person Updates Referral Views

Groups From: 28/02/2018 To: 28/02/2018 Person ID: Worker: Please select... Go

Days

Cases

Reports

Admin

Audit Log

DESCRIPTION: Shows each time a person has been viewed

NOTE: The Person ID is a unique number assigned by the computer to each person or alias. To determine the Person ID open up the Person Details page and hover your mouse over the person's name in the Person/Alias list. Two numbers (usually the same) will be displayed (separated by a forward slash). The first of those numbers is the Person ID.

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

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

IFS Training 1
Advice, Referral and Case Management (ARC) - Training

A Coordinator (Coordinator)

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

Persons **Person Views** Person Updates Referral Views

Groups From: 28/02/2018 To: 28/02/2018 Person ID: 3373 Worker: Please select... Go

Days

Cases

Reports

Admin

Audit Log

Date ↓	Person ID	Given Name	Family Name	Alias/Duplicate	Worker	Workgroup
28/02/2018 10:04:03 AEST	3373	Bella	Banana		A Coordinator	IFS Training 1
28/02/2018 10:00:42 AEST	3373	Bella	Banana		A Coordinator	IFS Training 1
28/02/2018 09:54:01 AEST	3373	Bella	Banana		A Coordinator	IFS Training 1

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**.

IFS Training 1
Advice, Referral and Case Management (ARC) - Training

A Coordinator (Coordinator)

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

Persons **Person Updates** Referral Views

Groups Start Date: 28/02/2018 End Date: 28/02/2018 Person Id: Worker: A Coordinator Go

Days

Cases

Reports

Admin

Search Results

Date ↓	Person Id	Given Name	Family Name	Alias	Action	Worker Id	Last Update By
28/02/2018 15:15:43	1286	Blake	Banana		UPDATE	102	A Coordinator, IFS Training 1
28/02/2018 09:55:21	3375	Georgie	Grape		INSERT	102	A Coordinator, IFS Training 1
28/02/2018 09:54:38	3374	Pamela	Pumpkin		INSERT	102	A Coordinator, IFS Training 1
28/02/2018 09:54:01	3373	Bella	Banana		INSERT	102	A Coordinator, IFS Training 1

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**.

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

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

Person Views Person Updates **Referral Views**

From: 28/02/2018 To: 28/02/2018 Person ID: Worker: A User Go

Audit Log

No matches to your search.

DESCRIPTION Shows each time a referral has been viewed. Specify by person and/or worker

NOTE: The Person ID is a unique number assigned by the computer to each person or alias. To determine the Person ID open up the Person Details page and hover your mouse over the person's name in the Person/Alias list. Two numbers (usually the same) will be displayed (separated by a forward slash). The first of those numbers is the Person ID.

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

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

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 \(familychildconnect.org.au\)](https://familychildconnect.org.au)

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