

Advice, Referrals and Case Management (ARC) system

Family and Child Connect (FaCC)

User Manual

August 2024

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.

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1 About ARC

Advice, Referrals and Case Management (ARC) is the system developed for Family and Child Connect 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

The **News** section will keep you informed of any software updates or system outages

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

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Advice Referrals and Case Management
This database contains private and confidential information. Access to this information is subject to State privacy legislation. Only authorised persons should access this database.
You should not give your username and password to any other person. Please keep your password secret. All access to this application is logged and is subject to regular audits.

Login to your account

Username

Password

[Forgot your password?](#)

[Sign in](#)

About ARC
Advice, Referrals and Case Management (ARC) is an online client management system developed in partnership with, and funded by the Department of Child Safety, Youth and Women (DCSYW), to support service delivery for Family and Child Connect, Intensive Family Support and Aboriginal and Torres Strait Islander Family Wellbeing services in Queensland.
ARC improves the efficiency and effectiveness of service delivery by helping organisations manage information and activities for vulnerable children and families.
Access to ARC is managed through Infoxchange with DCSYW receiving reports containing prescribed de-identified and limited identified data. The latter is used only for tracking program performance and is reviewed by a small number of staff subject to tight controls and is destroyed after use.

News
What's new for you - December news
Get the low-down on new features and recent changes [here](#)
SPECIAL ALERT - Referrals now attach to all Person records!
IMPORTANT NOTICE about Contact Report and group activities
The Contact Report, a standard SRS report, does not accurately reflect worker time recorded via Group Notes or Activity Records. Adjustments are required to reconcile recorded worker time using this report. >> [Read more](#)
Are you up-to-date with...
• Mastering the Cases Page - using the Associated Records feature
• Using the Groups feature - for IFS services and for A&TSLI Family Wellbeing services
• Understanding your Reports - providing insights for managing your service and understanding reporting requirements
• for FaCC and IFS services
• for A&TSLI Family Wellbeing services
For your reference:
• FaCC Program Guidelines
• IFS Program Guidelines
• A&TSLI Family Wellbeing Program Guidelines

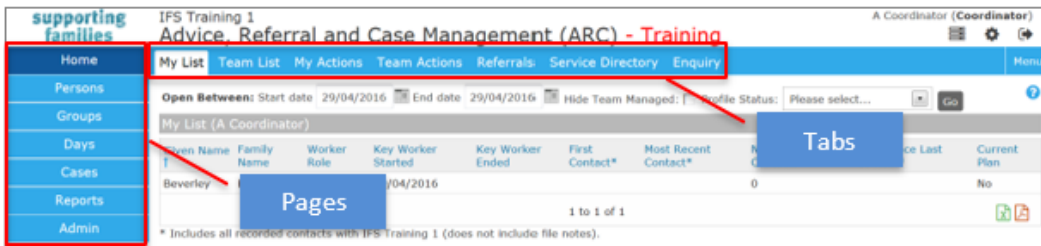
Need help using ARC?
Detailed 'how to' guidance is available in the User Manual. Simply click here to access:
• User Manual for FaCC
• User Manual for IFS
• User Manual for A&TSLI Family Wellbeing
• User Manual for ARC
• User Manual for A&TSLI Family Participation Program
If you experience any problems with ARC, please contact Infoxchange Helpline on 1300 366 516 or (03) 9419 7487 or email cas-support@infoxchange.org. If you contact the Helpline, please quote the web address you use to access ARC and the workgroup you belong to.
Support for practice related queries is available from Supporting Families and Family and Child Connect.
For any queries relating to practice matters, please email faccandifsupport@csyw.qld.gov.au or ATSLIteam@csyw.qld.gov.au

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. Do not write down your password.

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

1.3 Navigating ARC



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

Each screen within ARC comprises 3 areas :

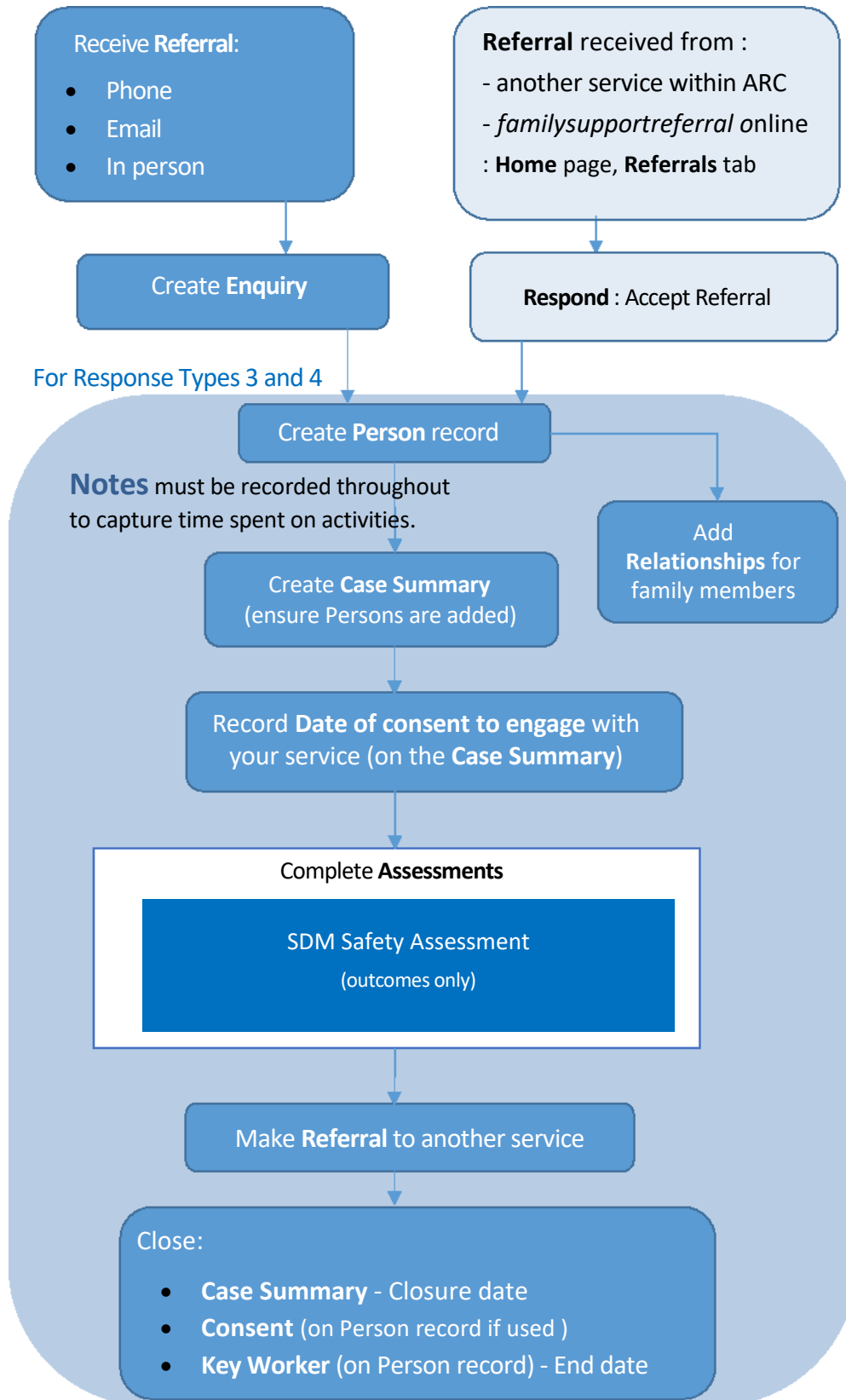
- Pages – 6 options on the left-hand side
- Tabs – appear across the top for each Page
- Workspace area – the central area.

Pages are grouped according to theme :

Home page:	Range of worker tools + Enquiry form
Persons page:	Search for clients and manage client records
Days page:	Enter or view data related to a particular day/date
Cases page:	View and access Case Summaries
Reports page:	Define and run various reports
Admin page:	User preferences, documents and coordinator functions

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

The diagram below is a useful reference for understanding the process (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 FaCC Training 1
Beverley Banana Female, DOB: 01/01/2000 (Age 16 yrs)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks

Persons **Person / Alias:** Beverley Banana Primary Name [Create new alias](#)

Days

Cases **Relationships:** [Create new relationship](#)

Person	Relationship	DOB	Comments
Briana Banana	Mother	01/04/1981	
Byron Banana	Brother	02/01/2005	

Reports

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

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

Description	Role	Workgroup	Start	Last Update
Case Summary Banana Family		FaCC Training 1	05/05/2016	05/05/2016

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

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

Screenshot 2

supporting families FaCC Training 1
Beverley Banana Female, DOB: 01/01/2000 (Age 16 yrs)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tasks

Persons **Person / Alias:** Beverley Banana Primary Name [Create new alias](#)

Days

Cases **Relationships:** [Create new relationship](#)

Person	Relationship	DOB	Comments
Briana Banana	Mother	01/04/1981	
Byron Banana	Brother	02/01/2005	

Reports

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

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

Description	Role	Workgroup	Start	Last Update
Case Summary Banana Family		FaCC Training 1	05/05/2016	05/05/2016
Prior Case Case Summary Banana Family	Referred Child	FaCC Training 1	15/03/2016	01/05/2016



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

1.5 Toggle for access to Person records

On the lefthand 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:

1. Click the toggle icon  to select your required display
2. Click on the blue name to open that Person record
3. 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.



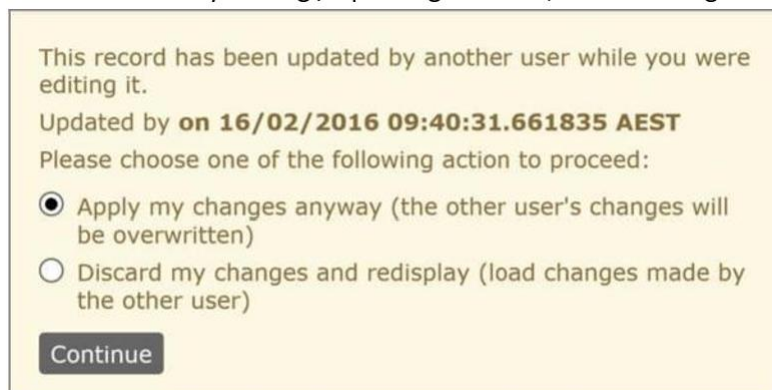
The workgroup options you have available will display. Simply select the radio button for the required workgroup and click OK.



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:



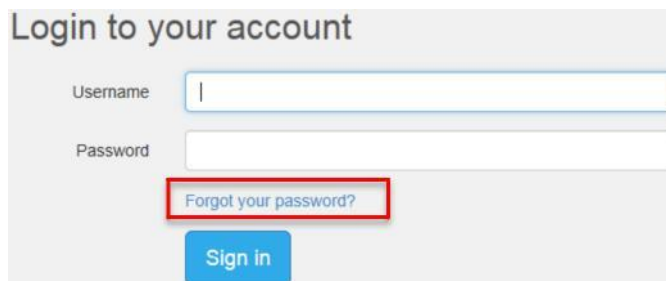
Select the required option, then click **Continue**.

1.9 Forgotten password

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

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

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



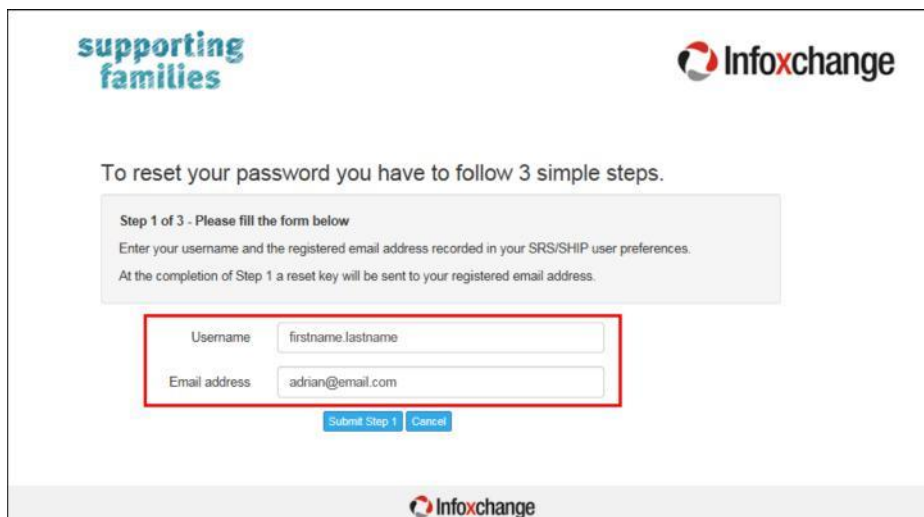
Login to your account

Username

Password

[Forgot your password?](#)

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



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

Step 1 of 3 - Please fill the form below

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

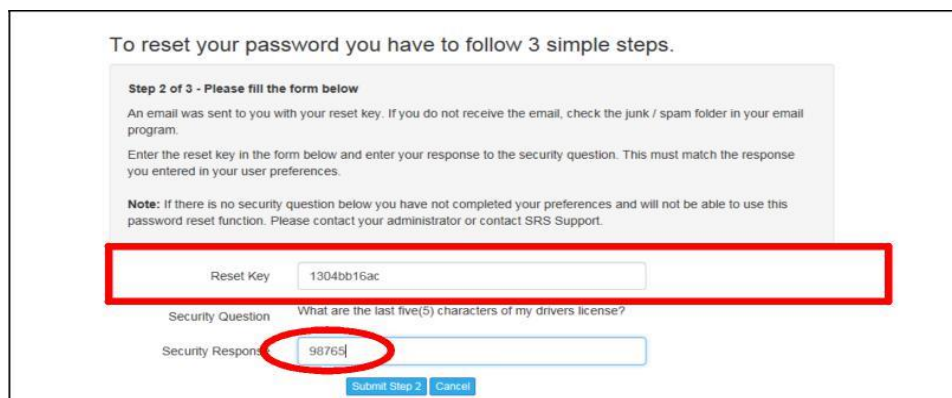
Username

Email address

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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

Security Response

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](#)

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



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

Your password was changed successfully!

[Login now](#)

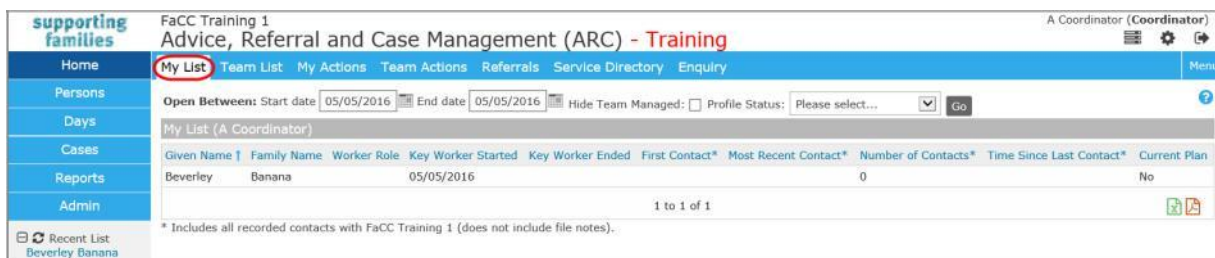
2 Home Page

2.1 My List

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

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

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



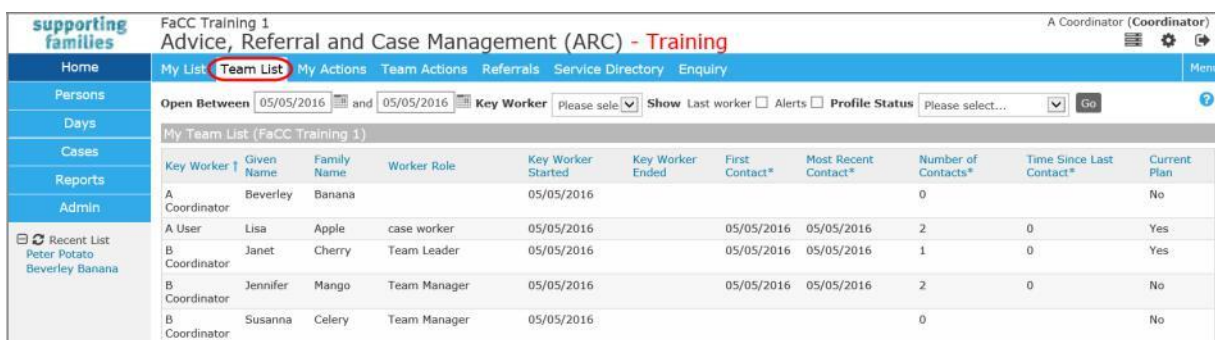
The following options can be used to customise your view:

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

2.2 Team List

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

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



The following options can be used to customise your view:

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

2.3 My Actions

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

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

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

The following options can be used to customise your view:

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

2.4 Team Actions

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

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

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

2.5 Service Directory

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

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

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



2. Enter Keywords to be used in the search such as 'youth' or 'aged care'. You can enter multiple Keywords to be used in your search. For example, if you would like to locate youth services that provide accommodation in a particular suburb, enter 'youth accommodation' and the name or postcode of the suburb. You can also separate search terms with commas such as 'youth, accommodation'.
3. Click **Search** or press **Enter**
Your search results from Service Seeker will be displayed. Each entry includes an extract of the service description from Service Seeker. To view the full Service Seeker details of the agency within a new browser tab, click the 'More Information' link. This link will also display a map showing the service location.
4. You can click on the star to add a service to 'Favourites'. Once you have done this the star becomes yellow.
5. Once you have flagged a favourite you can also add comments to the record. Do this by clicking the pencil icon. After you save the comment, it will be available to all members of the workgroup.

Additional Notes:

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

Search Hints:

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

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

3 Enquiries

The **Enquiry** form is the first point of data capture (including time spent) in ARC. This has been specifically designed to accommodate queries/enquiries received about the potential for providing support to vulnerable children and families e.g. telephone calls, emails or in-person interactions, and to recognise web (online form) referrals received (by email).

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

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

Enquiry Date	Worker	Person	Type	Status	Priority	Notes
05/05/2016 10:20 am	A User	Child Safety Officer	Professional	Closed	Normal	Father and care giver
05/05/2016 09:43 am	B Coordinator	Health Officer	Community	Closed	Normal	ACTIVE ENGAGEMENT
05/05/2016 09:43 am	E User	Child Safety Officer	Professional	Closed	Normal	ACTIVE ENGAGEMENT
05/05/2016 09:43 am	C User	Disability Officer	Professional	Responding	Normal	
05/05/2016 09:42 am	G User	School Teacher	Professional	Closed	Normal	ACTIVE ENGAGEMENT
05/05/2016 09:40 am	A User	Child Safety Officer	Professional	Closed	Normal	Child Safety referral

- 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.

Time and Date: 11:08 am Thu 27/06/2019

Worker: A Coordinator

Channel: Phone Email In person Fax Web Form

Enquirer: [Search]

Enquiry about: Self Other

Enquiry From: Community Professional

Name: Given name [] Family name []

Notes: []

Status: Pending

Suburb of family: []

* Do any Persons identify as indigenous: Yes No

* Referred from: []

Consent given for referral in Presenting Concerns: Yes No

Presenting Concerns:

- 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

Priority: Normal

Response type: []

* Total time (in minutes): []

Last Updated: []

Save

Important: all fields should be completed accurately as possible as many of these fields are used for reporting purposes.

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

- To record the name of the Person /s of concern (whom the enquiry is about), select the **Add Person** button on the Enquiry screen. Record the name of the person/s whom the enquiry is about in the **Associated person** fields.

The screenshot shows a web form titled "New enquiry details". At the top, it displays "Time and Date: 4:30 pm Tue 02/08/2016" and "Worker: E User". Below this is a "Channel" section with radio buttons for Phone, Email, In person, Fax, and Web Form. The "Enquirer" section has a dropdown for "Enquiry about" (Self, Other) and "Enquiry From" (Community, Professional). There are input fields for "Name" (containing "Bruce") and "Family name". The "Associated person" section has input fields for "Name" (containing "Person (first name)") and "of Concern (surname)". A blue "Add Person" button is located at the bottom right of the form, circled in red.

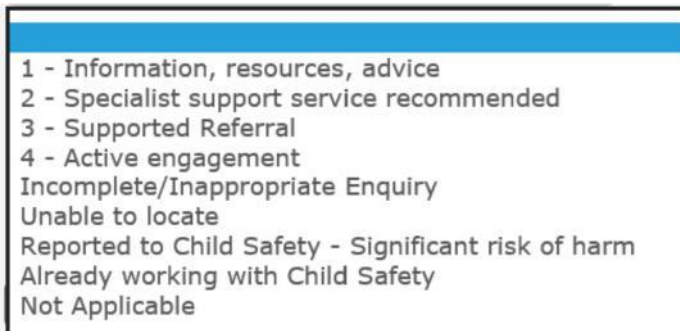
- Enter the **Suburb *** of the family
- Select a value for **Do any Persons identify as indigenous? ***
- Select a value from the **Referred from *** list

The screenshot shows a dropdown menu titled "* Referred from". The menu is open, displaying a list of service providers. The list is organized into three sections: "Prescribed entity", "Specialist service providers", and "Not a prescribed entity".

- 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), Family and Child Connect (FaCC), Intensive Family Support (IFS).
- Not a prescribed entity:** 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.

- Record if consent has been provided for
- Select enquiry **Status:*** from 3 available options :
 - Pending* (new Enquiry)
 - Responding* (in progress, being actioned by someone in your service)
 - Closed* (finalised/complete)
- Add **Notes** to reflect the nature of the enquiry

12. Indicate the **Presenting Concerns** (multi-select available)
13. Select the **Priority** (defaults to Normal) – this is used as prescribed by your service.
14. Select the **Response type *** from the list



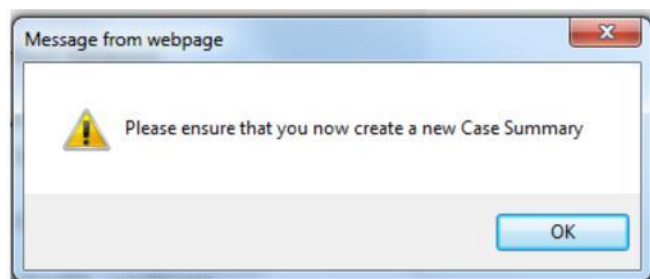
Response type is mandatory * when the **Status** is set to *Closed*.

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

Note:

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

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

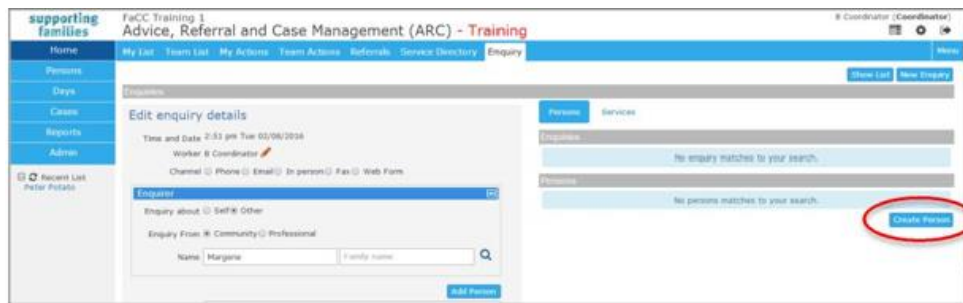


Additional Notes:


- To cancel an Enquiry before it is saved, simply click on the **Enquiry** tab at the top of the page.
- To view Enquiries prior to the 30 days displayed, use **Show Filters** to define the criteria for your search.

3.2 Create Person record from an Enquiry

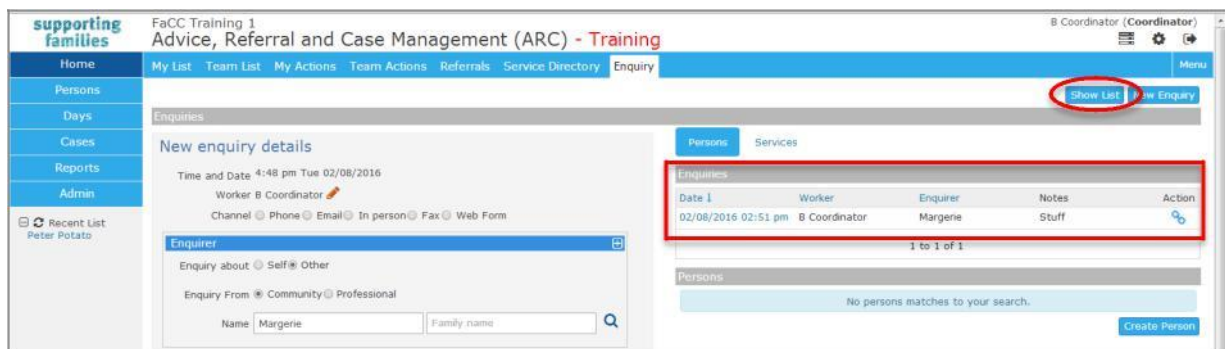
1. To create a new Person record from an **Enquiry**, enter the person's name in either the **Enquirer** section (for self-referral) or in the **Associated Person** section and select the icon.
2. If there is no record displayed, select **Create Person** on the right hand side of the screen. This will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



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. Any additional time must be added to the existing total, so it reflects the cumulative amount.

Note: It is not possible to access Enquiry records from the Person record.



3.4 Using the Enquiry List

- From the **Home** Page, select the **Enquiry** tab. A list of enquiries recorded with the last 30 days displays. Each of the columns may be used to sort displayed data – shown by the blue arrow.

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'A Coordinator (Coordinator)'. The main navigation bar includes 'Home', 'My List', 'Team List', 'My Actions', 'Team Actions', 'Referrals', 'Service Directory', and 'Enquiry'. The 'Enquiry' tab is active. Below the navigation bar, there are buttons for 'Show Filters' (circled in red) and 'New Enquiry'. The main content area displays a table of enquiries with columns: Enquiry Date, Worker, Person, Type, Status, Priority, and Notes. The table contains six rows of data. A 'Recent List' sidebar is visible on the left, and a pagination indicator '1 to 6 of 6' is at the bottom.

Enquiry Date	Worker	Person	Type	Status	Priority	Notes
05/05/2016 10:20 am	A User	Child Safety Officer	Professional	Closed	Normal	Father and care giver
05/05/2016 09:43 am	B Coordinator	Health Officer	Community	Closed	Normal	ACTIVE ENGAGEMENT
05/05/2016 09:43 am	E User	Child Safety Officer	Professional	Closed	Normal	ACTIVE ENGAGEMENT
05/05/2016 09:43 am	C User	Disability Officer	Professional	Responding	Normal	
05/05/2016 09:42 am	G User	School Teacher	Professional	Closed	Normal	ACTIVE ENGAGEMENT
05/05/2016 09:40 am	A User	Child Safety Officer	Professional	Closed	Normal	Child Safety referral

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

This screenshot shows the same 'supporting families' web application interface, but with the filter buttons highlighted. The 'Apply Filters', 'Clear Filters', and 'Hide Filters' buttons are circled in red. The table below the filters shows a different set of data, indicating that filters have been applied. The 'Enquiry Date' column now shows '05/04/2016' and '05/05/2016' with calendar icons. The 'Worker' column has a dropdown menu. The table contains three rows of data.

Enquiry Date	Worker	Person	Type	Status	Priority	Notes
05/04/2016						
05/05/2016						
05/05/2016 10:20 am	A User	Child Safety Officer	Professional	Closed	Normal	Father and care giver
05/05/2016 09:43 am	B Coordinator	Health Officer	Community	Closed	Normal	ACTIVE ENGAGEMENT

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

4. Person Details

4.1 Searching for a Person

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

There are 2 ways you can search for a Person :

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



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

Fuzzy searching allows you to search for clients with names that are a close match, or sound similar, to the one you typed. It is highly recommended to always do Fuzzy searching because of the variety in the way people spell names. For example a search of 'Doe' will also pick up 'Dough'.

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

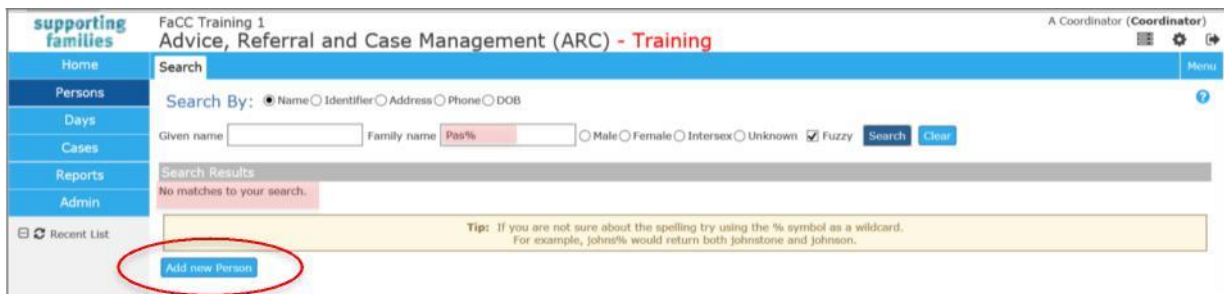
ARC recognises the * and % characters as wild cards. The * and % are both available to be used for wildcard searching and their use is identical and down to personal preference.

Some example wildcard searches include:

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

4.2 Add a Person

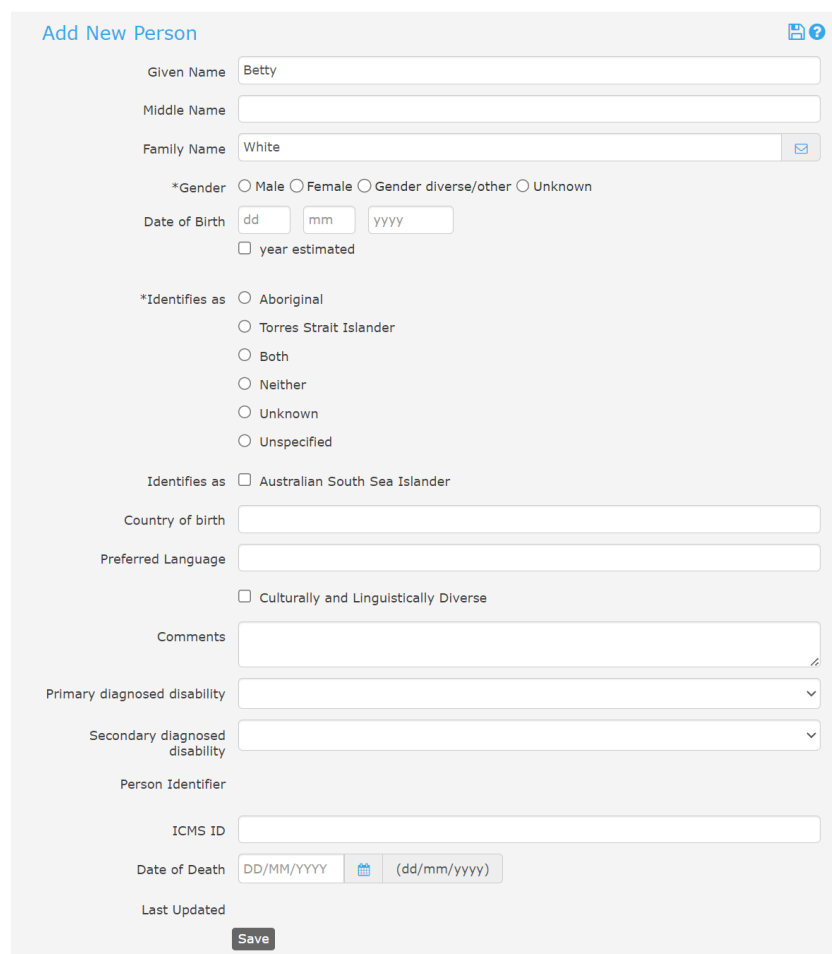
1. On the **Persons** page, **Search** tab, enter the criteria for the person you are searching for. Click **Search**.



The screenshot shows the 'supporting families' web application interface. The top navigation bar includes 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The 'Persons' page is active, and the 'Search' tab is selected. The search criteria are: Name (selected), Identifier, Address, Phone, and DOB. The search results show 'No matches to your search.' A red circle highlights the 'Add new Person' button at the bottom left of the search results area.

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 Aboriginal and Torres Strait Islander status are mandatory fields (*).
If the exact date of birth is unknown, select a year only and tick the **year estimated** checkbox.




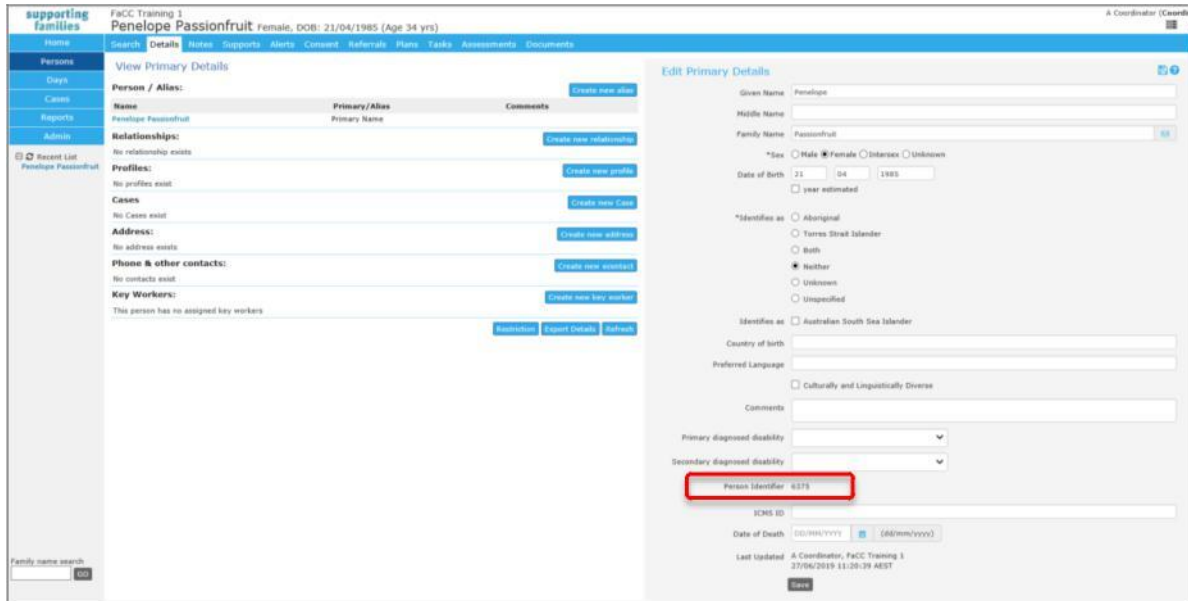
The screenshot shows the 'Add New Person' form. The form contains the following fields and options:

- Given Name: Betty
- Middle Name: (empty)
- Family Name: White
- *Gender: Male Female Gender diverse/other Unknown
- Date of Birth: dd, mm, yyyy
- year estimated
- *Identifies as: Aboriginal Torres Strait Islander Both Neither Unknown Unspecified
- Identifies as: Australian South Sea Islander
- Country of birth: (empty)
- Preferred Language: (empty)
- Culturally and Linguistically Diverse
- Comments: (empty)
- Primary diagnosed disability: (empty)
- Secondary diagnosed disability: (empty)
- Person Identifier: (empty)
- ICMS ID: (empty)
- Date of Death: DD/MM/YYYY (calendar icon) (dd/mm/yyyy)
- Last Updated: (empty)
- Save button

For recording Aboriginal and Torres Strait Islander identity:

- *Unknown* – the person does not know their status
- *Unspecified* – the person does not wish to specify their Aboriginal and/or Torres Strait Islander 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.

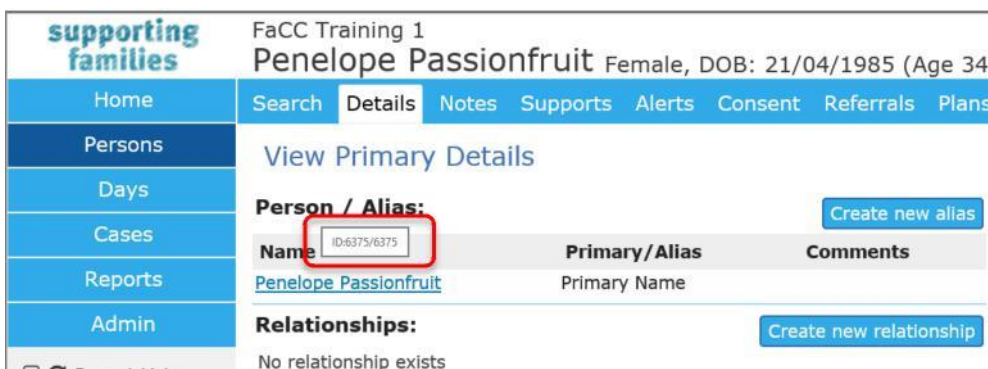


The screenshot shows the 'Edit Primary Details' form for a person named Penelope Passionfruit. The form is divided into several sections:

- Personal Information:** Given Name (Penelope), Middle Name, Family Name (Passionfruit), Sex (Male, Female, Intersex, Unknown), Date of Birth (21/04/1985).
- Identity:** *Identifies as (Aboriginal, Torres Strait Islander, Both, Neither, Unknown, Unspecified), Identifies as (Australian South Sea Islander).
- Other Fields:** Country of birth, Preferred Language, Comments, Primary diagnosed disability, Secondary diagnosed disability.
- Person Identifier:** A red box highlights the 'Person Identifier' field with the value '6375'.
- SCMS ID:** A field for the SCMS ID.
- Date of Death:** A field for the date of death.
- Last Updated:** A field for the last update date and time.

Person Identifier / Person ID :

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



The screenshot shows the 'View Primary Details' page for a person named Penelope Passionfruit. The page includes a navigation menu on the left and a main content area. The main content area shows the person's name and a red box highlighting the 'Person Identifier' field with the value 'ID:6375/6375'. The page also includes sections for 'Person / Alias', 'Relationships', and 'Key Workers'.

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 person named Carissa Carrot. The 'Details' tab is active, and the 'Person / Alias' section is displayed. A red circle highlights the 'Create new alias' button. To the right, the 'Add New Alias' form is visible, with fields for Given Name, Middle Name, and Family Name, and a 'Save' button at the bottom.

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 person, Carissa Carrot. The 'Details' tab is active, and the 'Person / Alias' section is displayed. The 'Princess' alias is selected, and the 'Edit Alias Details' form is visible on the right side of the page. The form contains the same fields as the 'Add New Alias' form, but the 'Given Name' field is populated with 'Princess'. The 'Save' button is visible at the bottom of the form.

4.4 Create Relationships

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

supporting families FaCC Training 1
Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

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

Persons **Person / Alias:**
Carissa Carrot Primary Name
Princess Alias

Days

Cases

Reports

Admin

Recent List
Carissa Carrot
Beverley Banana
Peter Potato

Relationships:
No relationship exists

Profiles:
No profiles exist

Cases:
No Cases exist

Address:
No address exists

Phone & other contacts:
No contacts exist

Key Workers:
This person has no assigned key workers

Search for related person: ?
Given name
Family name
Sex Male Female
Fuzzy

Results

- Search for the related person – enter either name and gender. Click Go. If no records are found, select **Add new person**.

supporting families FaCC Training 1
Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

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

Persons **Person / Alias:**
Carissa Carrot Primary Name
Princess Alias

Days

Cases

Reports

Admin

Recent List
Carissa Carrot
Beverley Banana
Peter Potato

Relationships:
No relationship exists

Profiles:
No profiles exist

Cases:
No Cases exist

Address:
No address exists

Phone & other contacts:
No contacts exist

Key Workers:
This person has no assigned key workers

Search for related person: ?
Given name Charles
Family name Carrot
Sex Male Female
Fuzzy

Results
No matches to your search.
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.

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

supporting families FaCC Training 1
Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

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

Persons **Person / Alias:**
Carissa Carrot Primary Name
Princess Alias

Days

Cases

Reports

Admin

Recent List
Carissa Carrot
Beverley Banana
Peter Potato

Relationships:
No relationship exists

Profiles:
No profiles exist

Cases:
No Cases exist

Address:
No address exists

Phone & other contacts:
No contacts exist

Key Workers:
This person has no assigned key workers

Edit Relationship

Related person Charles Carrot
is Carissa Carrot's
Start Date 05/05/2016
End Date
Comments
Last update

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

Note: the start date for a relationship may be Date of Birth or it could be the start date of care (e.g. foster care).

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

Person	Relationship	DOB	Comments
Charles Carrot	Father	01/01/1981	

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

Person	Relationship	DOB	Comments
Carissa Carrot	Daughter	14/04/2006	

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

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

4.5 Create Profile

Two profile templates are available in ARC : Child Profile + Report to Child Safety.

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

The screenshot shows the 'supporting families' web application interface. The main content area displays the profile for Charles Carrot (Male, DOB: 01/01/1981, Age 35 yrs). The 'Person / Alias' section shows Charles Carrot as the Primary Name. The 'Relationships' section lists Carissa Carrot as the Daughter (DOB: 14/04/2006). The 'Profiles' section indicates 'No profiles exist'. The 'Cases' section indicates 'No Cases exist'. The 'Address' section indicates 'No address exists'. The 'Phone & other contacts' section indicates 'No contacts exist'. The 'Key Workers' section indicates 'This person has no assigned key workers'. A 'Create new profile' dialog is open on the right, showing options for 'Child Profile' and '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.

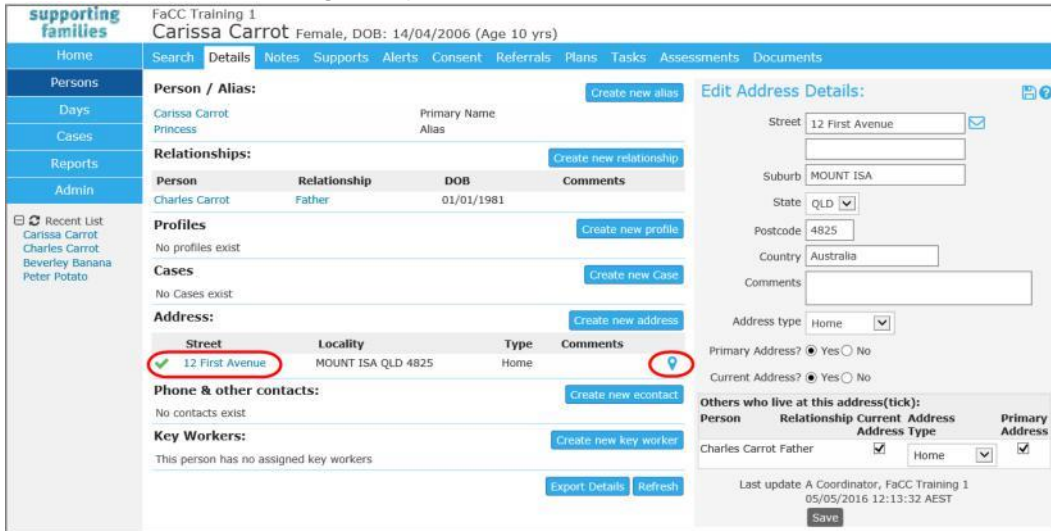
A single address can be associated with multiple related persons.

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

The screenshot shows the 'supporting families' web application interface for Carissa Carrot (Female, DOB: 14/04/2006, Age 10 yrs). The 'New Address Details' form is open on the right. The form includes fields for Street, Suburb, State (QLD), Postcode, Country (Australia), and Comments. It also has radio buttons for 'Primary Address?' and 'Current Address?'. A table at the bottom shows 'Others who live at this address' with columns for Person, Relationship, Current Address, Address Type, and Primary Address. The 'Create new address' button in the main content area is circled in red.

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.

- The address can be recorded, where relevant, to related persons by ticking the checkbox, in the **Others who live at this address** box.
- Select **Save**. The Primary address is indicated by the **green tick**.
- To edit the address, select the address blue text - the Edit Address Details form will open.
To view address in Google maps, select the  icon.



supporting families FaCC Training 1
Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

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

Person / Alias: Carissa Carrot (Primary Name), Princess (Alias) [Create new alias](#)

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Charles Carrot	Father	01/01/1981	

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

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

Address: [Create new address](#)


Street	Locality	Type	Comments
12 First Avenue	MOUNT ISA QLD 4825	Home	

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

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

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

Edit Address Details:

Street: 12 First Avenue 

Suburb: MOUNT ISA

State: QLD

Postcode: 4825

Country: Australia

Comments:

Address type: Home

Primary Address? Yes No

Current Address? Yes No

Others who live at this address(tick):

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

Last update: A Coordinator, FaCC Training 1
05/05/2016 12:13:32 AEST

[Save](#)

Note: When you start typing the Suburb, a list of possible options will appear.

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



New Address Details:

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

Street:

Suburb:

State: QLD

Postcode:

Country: Australia

Comments:

Address type: Home

Primary Address? Yes No

Current Address? Yes No

Others who live at this address(tick):

Person	Relationship	Current Address	Address Type	Primary Address
Charles Carrot	Father	<input type="checkbox"/>		
Patricia Parsnip	Mother	<input type="checkbox"/>		

Last update

[Save](#)

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

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

supporting families FaCC Training 1
Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

Home Search Details Notes Supports Alerts Consent Referrals Plans Tas

Persons **Person / Alias:** Create new alias

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Princess	Alias	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Charles Carrot	Father	01/01/1981	

Profiles: Create new profile
No profiles exist

Cases: Create new Case
No Cases exist

Address: Create new address

Street	Locality	Type	Comments	Last Update
✓ 12 First Avenue	MOUNT ISA QLD 4825	Home		02/03/2017
172 Golf Drive	QUILPIE QLD 4480	Home	For school holidays	02/03/2017

Phone & other contacts: Create new econtact
No contacts exist

Key Workers: Create new key worker
This person has no assigned key workers

Export Details Refresh

4.7 Create Phone & other contacts

A Person can have multiple electronic contact records such as phone, email 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.

supporting families FaCC Training 1
Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

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

Persons **Person / Alias:** Create new alias

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	
Princess	Alias	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Charles Carrot	Father	01/01/1981	

Profiles: Create new profile
No profiles exist

Cases: Create new Case
No Cases exist

Address: Create new address

Street	Locality	Type	Comments	Last Update
✓ 12 First Avenue	MOUNT ISA QLD 4825	Home		02/03/2017
172 Golf Drive	QUILPIE QLD 4480	Home	For school holidays	02/03/2017

Phone & other contacts: Create new econtact
No contacts exist

Key Workers: Create new key worker
This person has no assigned key workers

Export Details Refresh

Edit CONTACT Details:

*Contact

*Contact type

Safety Issues

Comments

Start Date 02/03/2017

End Date

Current econtact? Yes No

Last update

Save

2. In the **Contact** field, record the telephone number, email address etc.
3. Select a **Contact type** from the drop down menu.
Selecting *Emergency Contact* will display a yellow alert icon against that contact.

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

Phone & other contacts:			
		Create new econtact	View Prior
Contact	Type	Comments	Last Update
 4789 4789	Phone (Hm)	Relevant comments here	02/03/2017
carrot@carrot.com.au	Email	Accessed by both Charles and Carissa	02/03/2017
 0444 478 789	Emergency Contact	For Charles	02/03/2017
Prior contacts			
Contact	Type	Comments	Last Update
ccarrot@telstra.com	Email		02/03/2017

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 working with the family e.g. a doctor, a counsellor. **Note:** Persons external to your workgroup do not have access to ARC - their name is simply entered for information purposes only.

When you create a new Key Worker, you have the option to record useful comments about the role of the key worker and his or her responsibilities.

1. Select **Create new key worker**. The **Edit Key Worker** form will appear on the right of screen.
2. Select the **Key Worker** from the drop down list.
To record a key worker external to your service, select 'Other, please specify:' from the bottom of the **Key Worker** list. Then enter their name, role and organisation details.
3. Add **Role** and **Comments** as required.
4. In **May be viewed by**, select Workgroup.
5. The **Start Date** defaults to today's date.
6. Select **Save**. To modify the details, click on the Key Worker name - the edit screen will display on the right hand side. Update the details and select **Save**.

The screenshot shows the 'supporting families' interface for a person named Penelope Passionfruit. The 'Details' tab is active, displaying various information sections. The 'Key Workers' section at the bottom is highlighted with a red box, showing a table with columns for Worker, Workgroup, Role, and Comments. The 'Edit Key Worker' form on the right is also highlighted with a red box, showing fields for Name, Workgroup, Role, Comments, Start Date, End Date, and Current Key Worker status.

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

- Select **No** for **Current Key Worker?**
- Click **Save**. The End Date auto-populates to 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. Refer to Sections 5.3 and 5.5 for more information

5 Cases / Case Summary

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

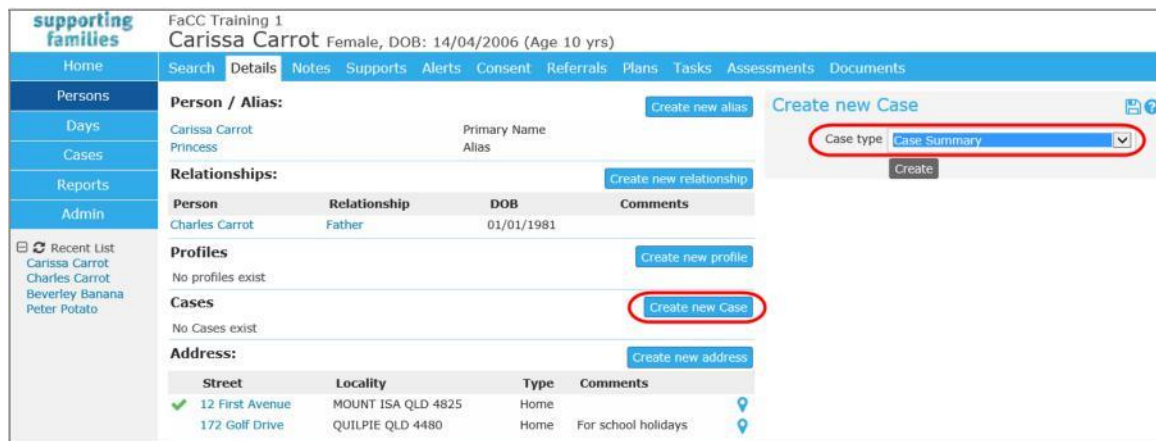
A Person can only be associated with one open Case Summary at any one time.

Case Summaries can be created in two ways:

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

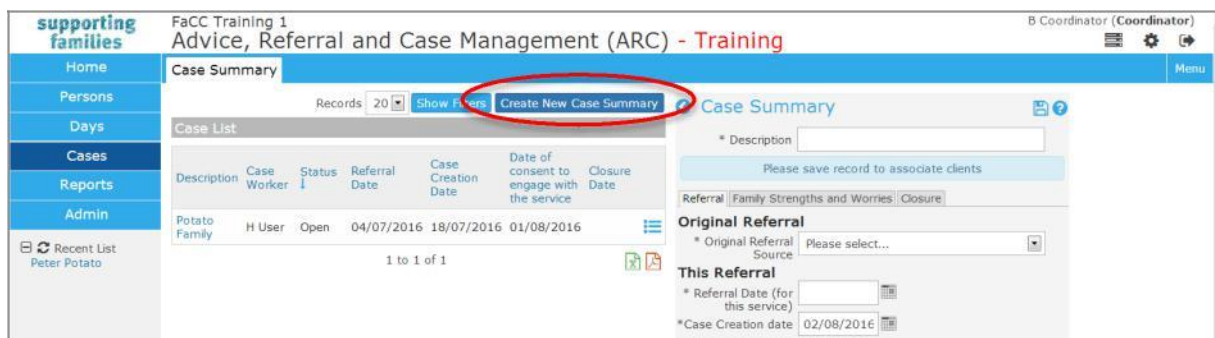
5.1 Create a Case / Case Summary from Persons page

- From the **Persons** page, **Details** tab, select the **Create new Case** button.
- Select **Case Summary** from the **Case type** list. Click **Create**.
The form will open in the right-hand side of your screen.
Complete as outlined in Section 5.3 below



5.2 Create Case / Case Summary from the Cases page

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



5.3 Complete Case Summary details

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

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

The mandatory fields are marked with an asterisk *.

The screenshot shows a 'Case Summary' form with several sections. Red boxes highlight the following fields: the 'Description' field at the top; the 'Referral' tab; the 'Original Referral Source' dropdown; the 'Referral Date (for this service)' date field; the 'Case Creation date' date field; the 'Referral Source' dropdown; the 'Date of consent to engage with the service' date field; and the 'Case Worker' dropdown. The form includes sections for 'Original Referral', 'This Referral', 'Other Referral Details', and 'Service Response'. A 'Save' button is 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 procedures of 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 **Referral Date (for this service)** * – the date this referral was *received* by your service.

4. Enter **Case Creation Date*** – this defaults to today’s date (can be backdated).

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

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

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

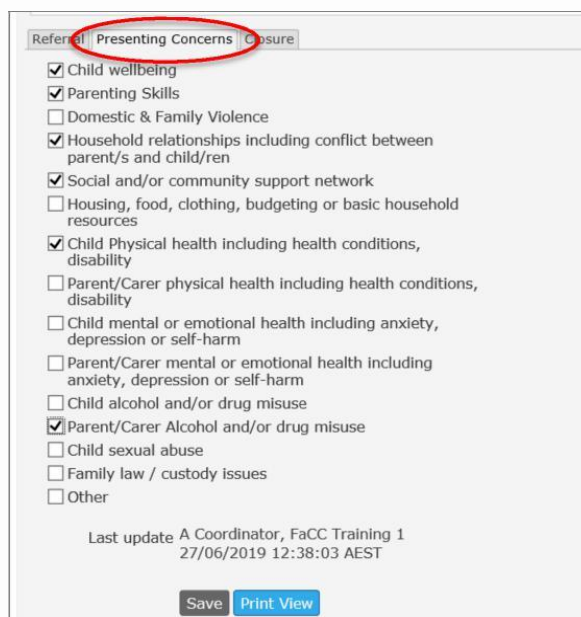
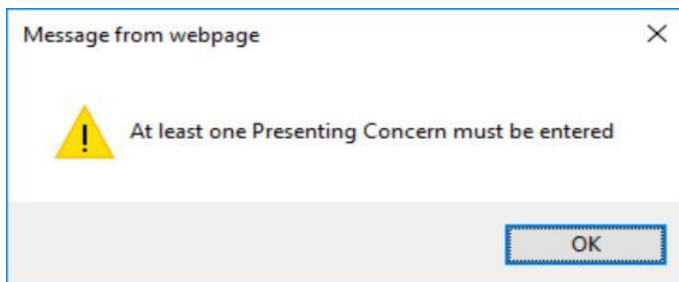
* Referral Source

- 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

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 and the Type of referral.

7. Select **Save**.

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



Referrals | **Presenting Concerns** | Closure

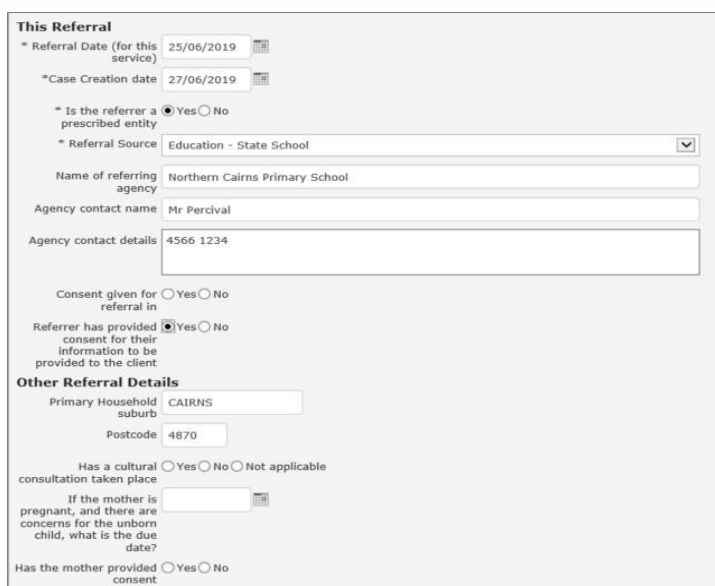
- Child wellbeing
- Parenting Skills
- Domestic & Family Violence
- Household relationships including conflict between parent/s and child/ren
- Social and/or community support network
- Housing, food, clothing, budgeting or basic household resources
- Child Physical health including health conditions, 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

Last update A Coordinator, FaCC Training 1
27/06/2019 12:38:03 AEST

Save Print View

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

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



This Referral

* Referral Date (for this service) 25/06/2019

* Case Creation date 27/06/2019

* Is the referrer a prescribed entity Yes No

* Referral Source Education - State School

Name of referring agency Northern Cairns Primary School

Agency contact name Mr Percival

Agency contact details 4566 1234

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 CAIRNS

Postcode 4870

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**.

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

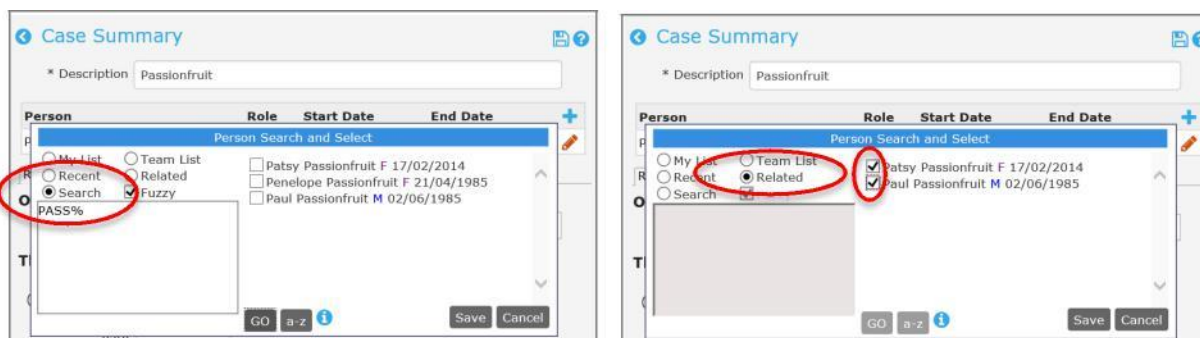


12. This will open the **Person Search and Select** pop up box.

Select the Search radio button, enter the client's 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.

Tick the checkbox for those Persons to be added to the Case Summary and click **Save**.



Click **Save**.

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

Click the **red** crayon for each Person to assign their Role - the **Edit association details** box will display. Click **Save**.

Case Summary

* Description: Passionfruit

Person	Role	Start Date	End Date
Patsy Passionfruit		27/06/2019	
Paul Passionfruit		27/06/2019	
Penelope Passionfruit		27/06/2019	

Referral | Presenting Concerns | Closure

Original Referral

* Original Referral Source: Education - State School

Edit association details

Person: Patsy Passionfruit

Role: **Please select...**

- Carer/parent
- Referred Child
- Other
- Primary Carer

* Start Date: [calendar icon]

End Date: [calendar icon]

Comments: [text area]

Last update: A Coordinator, FaCC Training 1
27/06/2019 12:49:32 AEST

Save | Delete | Cancel

The **Start Date** reflected in the *Person* section defaults to today's date.

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

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

Case Summary

* Description: Passionfruit

Person	Role	Start Date	End Date
Patsy Passionfruit	Referred Child	27/06/2019	
Paul Passionfruit	Carer/parent	27/06/2019	
Penelope Passionfruit	Primary Carer	27/06/2019	

Referral | Presenting Concerns | Closure

Original Referral

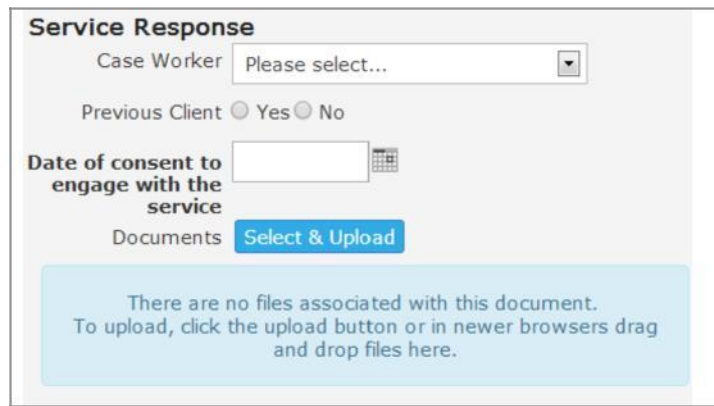
* Original Referral Source: Education - State School

This Referral

* Referral Date (for this service): 25/06/2019

* Case Creation date: 27/06/2019

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



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

Refer [Managing Cases](#) for more information.

14. Click **Save**.

15. **Secondly**, **Date of consent to engage with the service*** is the date the family consented to work with your service. This field is very important for reporting purposes.

Typically, this will be obtained some time after you have created the Case Summary.

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

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

5.4 Close a Case / Case Summary

The accurate closure of the Case/Case Summary is very important for reporting purposes. **Closing a Case Summary means you have finished working with the family**. Complete the following steps to close a Case/Case Summary :

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

Case Summary

* Description: Carrot Family

Person	Role	Start Date	End Date	
Patricia Parsnip	Carer/parent	02/03/2017		
Charles Carrot	Carer/parent	02/03/2017		
Carissa Carrot	Referred Child	02/03/2017		

Referral | Presenting Concerns | **Closure**

Exit referrals / links with other agencies

Closure date:

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

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

Feedback

- Feedback to referrer
- Feedback to family regarding referral outcome

Last update A Coordinator, FaCC Training 1
02/03/2017 16:36:00

- Use the **Exit Referrals/Links with other agencies** text box to record any relevant details.
- 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 the **Reason for case summary closure*** from the list of values available (can only select one).

Please select...

Please select...

Referral to another service

- Referred - ATSI Family Wellbeing
- Referred - CALD/Migrant support service
- Referred - Counselling - Financial
- Referred - Counselling - Relationship/Family
- Referred - DFV Service
- Referred - Disability Service
- Referred - Drug and Alcohol Service
- Referred - Education - Early Childhood Education and Care
- Referred - Education - school support
- Referred - Emergency relief/Financial support
- Referred - Employment and training services
- Referred - Family and Child Connect
- Referred - Family Support (not IFS)
- Referred - Health - CYMHS
- Referred - Health Visiting Program
- Referred - Housing and homelessness service
- Referred - Intensive Family Support
- Referred - Medical - Allied Health

- Complete the **Closure checklist** - Procedure Review, Data Collection and Feedback sections as appropriate, in accordance with your service procedures.

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
Beetroot Family Referral	G User	Open	05/05/2016	05/05/2016	05/05/2016	
Carrot Family	A Coordinator	Open	01/05/2016	05/05/2016	05/05/2016	
Cherry Family Referral	B Coordinator	Open	05/05/2016	05/05/2016		
Initial Referral	C User	Open	05/05/2016	05/05/2016		
Mango Family	E User	Open	05/05/2016	05/05/2016		
Banana Family	A Coordinator	Closed	01/03/2016	15/03/2016		01/05/2016
Banana Family	A Coordinator	Closed	02/05/2016	02/05/2016		03/05/2016
Fox Family	B Coordinator	Closed	15/02/2016	17/02/2016	29/02/2016	12/04/2016
Mushroom Referral	A User	Closed	05/05/2016	05/05/2016	05/05/2016	05/05/2016
Referral for Apple family	A User	Closed	05/05/2016	05/05/2016	04/05/2016	05/05/2016

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.

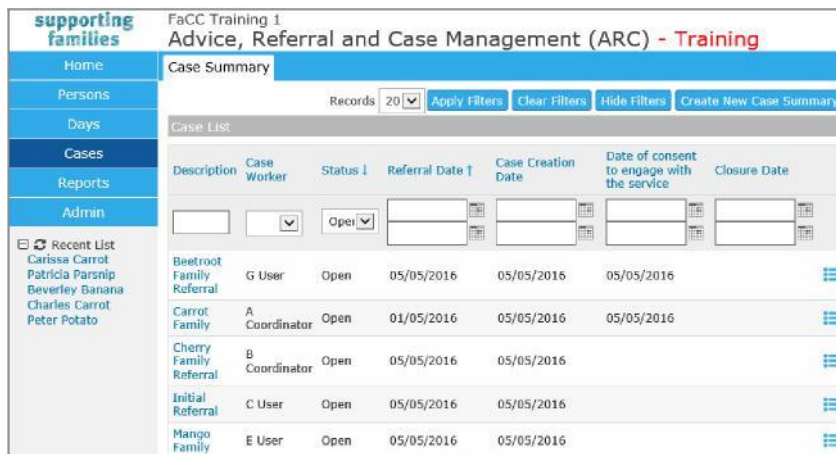
Description	Case Worker	Status	Referral Date ↑	Case Creation Date	Date of consent to engage with the service	Closure Date
Beetroot Family Referral	G User	Open	05/05/2016	05/05/2016	05/05/2016	
Carrot Family	A Coordinator	Open	01/05/2016	05/05/2016	05/05/2016	
Cherry Family Referral	B Coordinator	Open	05/05/2016	05/05/2016		
Initial Referral	C User	Open	05/05/2016	05/05/2016		
Mango Family	E User	Open	05/05/2016	05/05/2016		
Banana Family	A Coordinator	Closed	01/03/2016	15/03/2016		01/05/2016
Banana Family	A Coordinator	Closed	02/05/2016	02/05/2016		03/05/2016
Fox Family	B Coordinator	Closed	15/02/2016	17/02/2016	29/02/2016	12/04/2016
Mushroom Referral	A User	Closed	05/05/2016	05/05/2016	05/05/2016	05/05/2016
Referral for Apple family	A User	Closed	05/05/2016	05/05/2016	04/05/2016	05/05/2016

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 to tailor a new search.

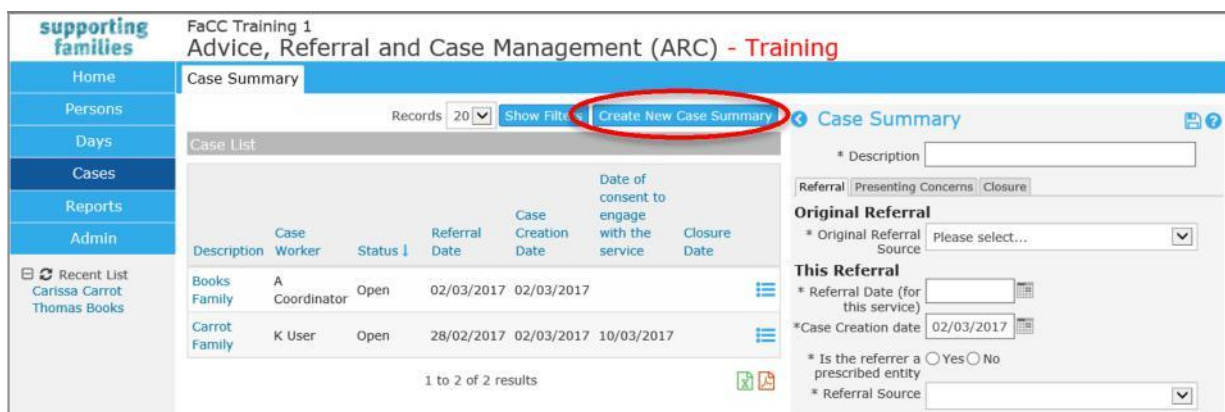


Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Beetroot Family Referral	G User	Open	05/05/2016	05/05/2016	05/05/2016	
Carrot Family	A Coordinator	Open	01/05/2016	05/05/2016	05/05/2016	
Cherry Family Referral	B Coordinator	Open	05/05/2016	05/05/2016		
Initial Referral	C User	Open	05/05/2016	05/05/2016		
Mango Family	E User	Open	05/05/2016	05/05/2016		

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



Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Books Family	A Coordinator	Open	02/03/2017	02/03/2017		
Carrot Family	K User	Open	28/02/2017	02/03/2017	10/03/2017	

Complete the six mandatory data fields (marked with *) and click SAVE.

d) View associated records

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

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

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

The screenshot shows the 'Case Summary' page for 'FaCC Training 1'. It features a 'Case List' table with columns: Description, Case Worker, Status, Referral Date, Case Creation Date, Date of consent to engage with the service, and Closure Date. Below this is an 'Associated Records' table with columns: Date, Record, Type, and Notes. The first record in the 'Associated Records' table is circled in red, and an 'i' icon is visible in its 'Date' column.

Date	Record	Type	Notes
05/05/2016	Assessment [SDM Family Risk Evaluation]		
05/05/2016	Assessment [SDM Safety Assessment]		
05/05/2016	Support	Brokerage	Pediatric Assessment for Barr...
05/05/2016	Support	Emergency Relief	Groceries
05/05/2016	Note		Consult with PCPP
05/05/2016	Note		Intake Home Visit Completed
05/05/2016	Note		REFERRAL CREATION

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

This screenshot shows the 'Associated Records' table with a pop-up window displaying details for the first record. The pop-up window contains the following information:

- Workers / Workgroups**
- G User, FaCC Training 1
- Information**
- * Final Risk Level: High
- * Override Applied: No
- * Date of Assessment: 05/05/2016

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

This screenshot shows the 'Associated Records' table with the 'Date' column header circled in red, indicating it is the active sort column. The table contains the following records:

Date	Record	Type	Notes
05/05/2016	Assessment [SDM Safety Assessment]		
05/05/2016	Assessment [SDM Family Risk Evaluation]		
05/05/2016	Support	Emergency Relief	Groceries
05/05/2016	Support	Brokerage	Pediatric Assessment for Barr...
05/05/2016	Note		REFERRAL CREATION
05/05/2016	Note		Intake Home Visit Completed

The **Filter** button enables you to define the parameters for 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 are search filters: 'From:' and 'To:' with calendar icons, and 'Record:' with a dropdown menu showing 'Please select...'. There are 'Go' and 'Clear' buttons. Below the filters is a table with columns: Date, Record, Type, and Notes.

Date	Record	Type	Notes
05/05/2016	Assessment [SDM Safety Assessment]		
05/05/2016	Assessment [SDM Family Risk Evaluation]		
05/05/2016	Support	Emergency Groceries Relief	
05/05/2016	Support	Brokerage	Pediatric Assessment for Barr...
05/05/2016	Note		REFERRAL CREATION

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. A dropdown menu is open, listing record types: Note, Support, Alert, Task, Assessment (bolded), SDM Safety Assessment, SDM Family Risk Evaluation, and Document. The table below shows one record: 02/03/2017, Note.

Date	Record	Type
02/03/2017	Note	

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.

The screenshot shows a form section titled 'This note is associated with (tick):'. It lists three names with checkboxes: Cedric Cucumber (checked), Craig Cucumber (checked), and Carla Cucumber (unchecked).

This note is associated with (tick):	
Cedric Cucumber	<input checked="" type="checkbox"/>
Craig Cucumber	<input checked="" type="checkbox"/>
Carla Cucumber	<input type="checkbox"/>

6 Record Consent

The *Program Guidelines* for Family and Child Connect 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:

- A. 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
- B. In the **Consent** tab on the Person record.

To record consent:

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

The screenshot shows a form titled "Service Response". It includes a "Case Worker" dropdown menu with "K User" selected. Below that is a "Previous Family" section with radio buttons for "Yes" and "No". The "Date of consent to engage with the service" field is highlighted with a red box and contains the date "19/12/2018" next to a calendar icon.

This field is used for reporting purposes for your service.

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

The screenshot shows the "Edit Consent Details" form in the "supporting families" system. The user is logged in as "FaCC Training 1" and is viewing the profile of "Penelope Passionfruit". The "Consent" tab is active, and the "Create New Consent" button is highlighted with a red circle. The form includes fields for "Start date" (27/06/2019), "Review date", and "End Date". There is a section for "Consent to engage with the service" with radio buttons for "Yes" and "No". A "Notes" field is also present. At the bottom, there is a section for "This consent is also associated with (tick):" with a table listing family members and their relationships. The "Save" button is at the bottom right.

8. 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.

The screenshot shows a file upload area. It has a "Scanned copy" label and a "Browse..." button. Below this, it says "(Max File Size: 5 MB)". A blue box contains the message: "There are no files associated with this document. To upload, click the upload button or in newer browsers drag and drop files here."

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.

9. Once the documents have been uploaded, 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.

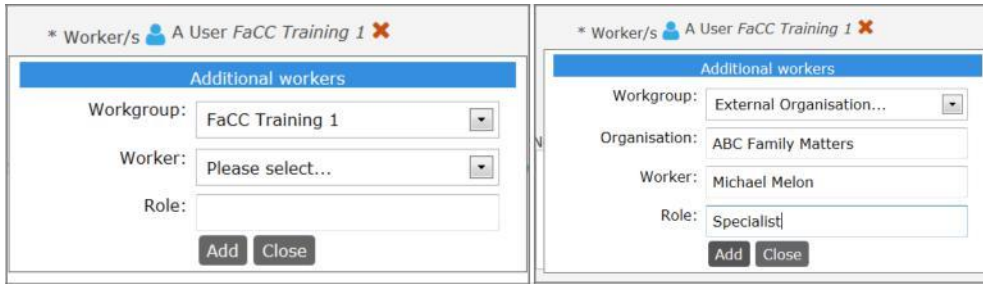
2. Click **Create New Note**.

The screenshot shows the 'supporting families' web application interface. The main header displays 'FaCC Training 1' and 'Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)'. The navigation menu includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Assessments', and 'Documents'. The 'Notes' tab is active, showing a table with columns for 'Activity Date', 'Worker / Type', and 'Notes'. A 'Create New Note' button is circled in red. The 'Edit Note Details' panel on the right contains the following information:

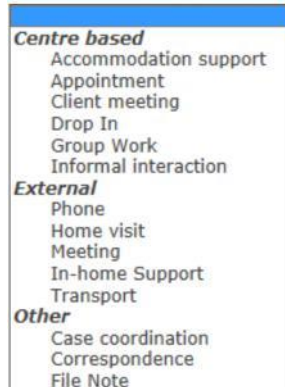
- Activity Date: 03/08/2016
- Worker/s: F User, FaCC Training 1
- Activity Type: Phone
- Case Summary: Carrot Family
- Notes: Contacted family to arrange initial meeting
- Service provided: Child / Family, Health / Counselling, General Support / Counselling / Advocacy, Domestic and Family Violence (DFV), General / Personal Support, Financial/Employment, FaCC Services (Create referral, Client transfer to another service, Warm handover, Stakeholder meeting / liaison, Safety planning), 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): Charles Carrot (Father), Patricia Parsnip (Mother)
- Activity Length: 20 mins
- May be edited to 06/08/2016
- Last update: B Coordinator, FaCC Training 1, 03/08/2016 08:46:30
- Buttons: Save, Delete, Save Final, Print View

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

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



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



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

Reported to
 Child Safety (RIS)
 Child Safety (CSSC)

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

Consultation with PCPP
 DFV Consultation
 Cultural Consultation
 Disability Support
 Practice Consultation
 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 the note. Notes will become locked/uneditable after 3 days of saving.
 14. Select **Save Final** to lock the note.

Edit Note Details 📄 ?

Activity Date 📅

* Worker/s 👤 F User, FaCC Training 1 ✖

* Activity Type ▼

Case Summary ▼

Notes

Contacted family to arrange initial meeting

Service provided

- Child / Family**
- Health / Counselling**
- General Support/ Counselling / Advocacy**
- Domestic and Family Violence (DFV)**
- General/ Personal Support**
- Financial/Employment**
- FaCC Services**
 - Create referral
 - Client transfer to another service
 - Warm handover
 - Stakeholder meeting / liaison
 - Safety planning
- 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):

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

Activity Length mins

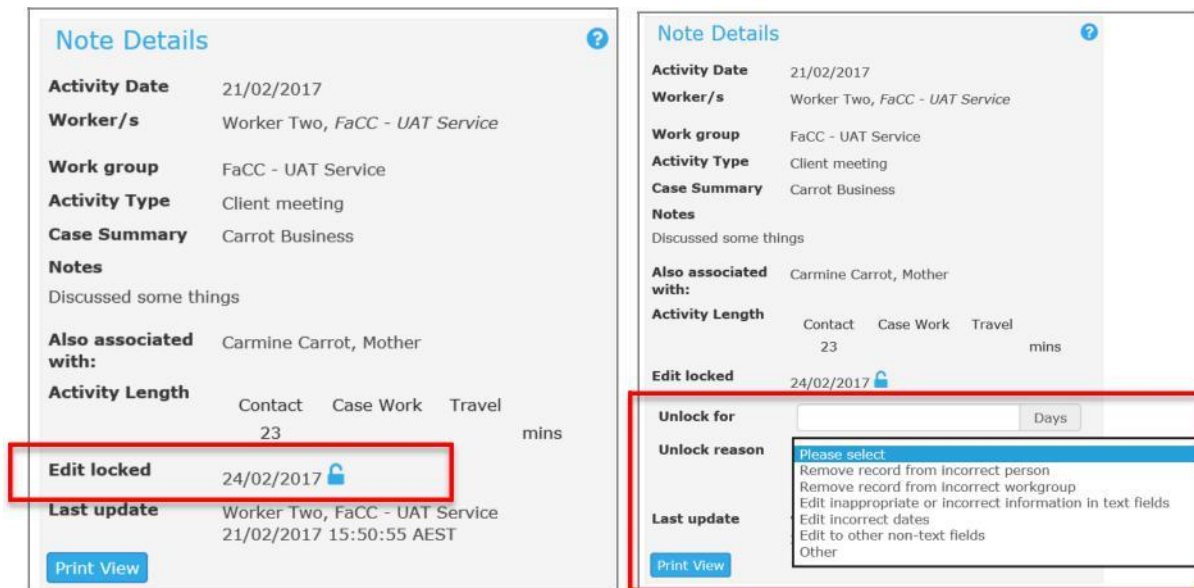
May be edited to 06/08/2016

Last update B Coordinator, FaCC Training 1
03/08/2016 08:46:30

Additional Notes:

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

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



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

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

Activity Date ↑	Worker / Type	Notes
22/07/2016	G User File Note	CLOSE CASE SUMMARY
12/07/2016	G User Client meeting	..insert details...
05/07/2016	G User Appointment	...insert details...
04/07/2016	G User Client meeting	...insert details...
28/06/2016	G User Client meeting	Met with family - secured consent. Very positive meeting.
20/06/2016	G User Phone	Contacted Patricia to arrange initial meeting
15/06/2016	G User File Note	CREATE CASE SUMMARY

8 Assessments

8.1 Record Assessments

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

The Assessments available are:

- SDM Safety Assessment (outcomes only)
- **Note:** Family Risk Evaluation is no longer being used in FaCC

NOTE: Useful documents relating to Assessments can be found in the **Documents** tab on the **Admin** page.

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





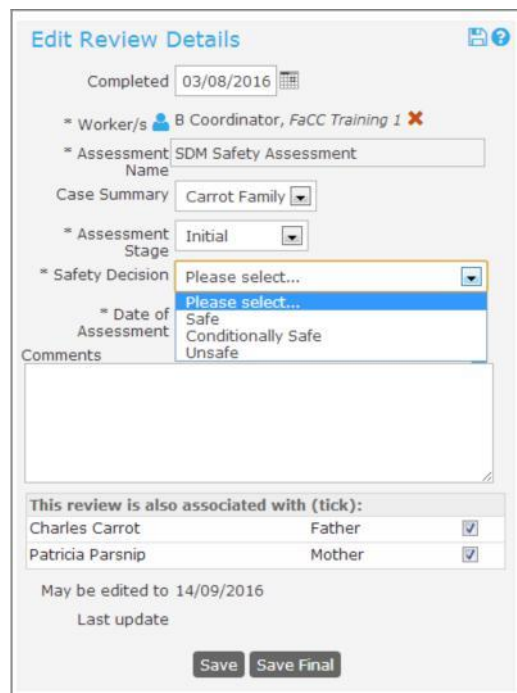
Additional Notes :

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

8.2 Complete SDM Safety Assessment



Note: The *SDM Safety Assessment* in ARC is only capturing the outcome of the assessment for reporting purposes, not the actual assessment.

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, FaCC 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 14/09/2016
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.

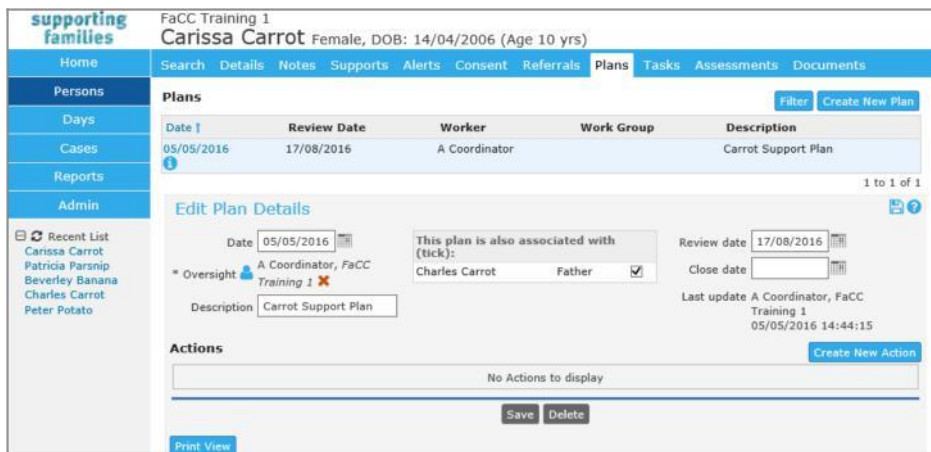
A family can have multiple plans, if this is required for the specific needs being addressed by your service. Each plan can have multiple actions enabling the identification and recording of issues, goals, actions and outcomes.

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.



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 to add the relevant worker/s from the drop down list. To delete workers, select the icon
6. In the **This plan is also associated with** section, select the family members involved in this Plan (as for the Case Summary).
7. Click **Save**. Once the plan is saved, you are able to add Actions.



9.2 Create new Action within a Plan

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

The screenshot shows the 'Edit Plan Details' form for a plan named 'Carrot Support Plan'. The plan is associated with 'Carissa Carrot' (DOB: 14/04/2006, Age 10 yrs) and has a review date of 17/08/2016. The 'Actions' section is currently empty, and a 'Create New Action' button is highlighted with a red circle. Below the 'Actions' section is the 'Edit Action Details' form, which includes fields for Date, Review date, Closed date, Oversight, Domain, Concerns and Worries, Strengths and Resources, Goal, Outcome, and Comments on Outcome. The 'Outcome' section has radio buttons for 'Goal not achieved', 'Goal fully achieved', and 'N/A'. The 'Order' field is set to 0.

2. Enter the **Date** and **Review date** (if applicable).
 3. The **Oversight** field will default to the user entering the Action. If additional workers are involved with this Action, select the icon to add the relevant worker/s from the drop down list. To delete workers, select the icon
 4. Select the **Domain** from the list box.
 5. Enter details for the **Concerns and Worries**, **Strengths and Resources**, **Goal** and **Actions**.
 6. To **Add a Service** to the Action, 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 Action. To remove a Service from a plan, select the icon.
- Note:** The adding of a Service is for information purposes only. The external Service does not have access to ARC.
7. To change the order in which the Actions appear in your Plan, highlight the Action in the Plan and enter the required position in the **Order** field in the bottom right corner of the screen.
 8. Select **Save**.
 9. To **record a Referral** from the Action, select the icon next to the Service (note, a Service must be added to the Action, as outlined in the steps above, for this icon to appear). This will take the user to the Referral form within the Referrals tab. Refer [Managing Referrals](#)
 10. To record another Action, click **Create New Action** – 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 Actions is shown below :

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

Edit Plan Details

Date: 05/05/2016
 * Oversight: A Coordinator, FaCC Training 1
 Description: Carrot Support Plan
 This plan is also associated with (tick): Charles Carrot, Father
 Review date: 17/08/2016
 Close date:
 Last update: A Coordinator, FaCC Training 1, 05/05/2016 14:46:29

Actions

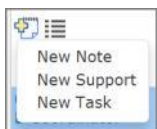
Date/Worker	Domain, Strengths, Concerns/Worries	Goals	Actions	Review/Close
05/05/2016 A Coordinator	Domain: Family Safety Concerns and Worries: ...enter details here.. Strengths: ...enter details here.. Service:	...enter details here..	...enter details here..	Review: Closed:
05/05/2016 A Coordinator	Domain: Material Wellbeing Concerns and Worries: ...enter details here.. Strengths: ...enter details here.. Service:	...enter details here..	...enter details here..	Review: Closed:
05/05/2016 A Coordinator	Domain: Health Concerns and Worries: ...enter details here.. Strengths: ...enter details here.. Service:	...enter details here..	...enter details here..	Review: Closed:

Edit Action Details

Date: 05/05/2016
 Review date:
 Closed date:
 * Oversight: A Coordinator, FaCC Training 1
 Last update: A Coordinator, FaCC Training 1, 05/05/2016 14:46:29

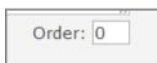
Domain: Health
 Goal: ...enter details here..
 Actions: ...enter details here..
 Concerns and Worries: ...enter details here..
 Strengths and Resources: ...enter details here..
 Outcome: Goal not achieved (1 radio), Goal fully achieved (5 radio), N/A (radio)
 Comments on Outcome:
 Service:
 Order: 0

Buttons: Save, Delete, Print View




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

This is a particularly useful, time-efficient feature.



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

Additional Notes:

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

9.3 Close an Action within a Plan

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

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

The screenshot displays the 'Supporting Families' interface for a user named Carissa Carrot. The main navigation bar includes Home, Search, Details, Notes, Supports, Alerts, Consent, Referrals, Plans, Tasks, Assessments, and Documents. The left sidebar shows navigation options: Persons, Days, Cases, Reports, Admin, and a Recent List. The main content area is titled 'Plans' and shows a table of 'Prior Plans' with columns for Date, Review Date, Worker, Work Group, and Description. Below this is the 'Edit Plan Details' form, which includes fields for Date, Review date, Close date (circled in red), and Description. The 'Actions' section contains a table with columns for Date/Worker, Domain, Strengths, Concerns/Worries, Goals, Actions, and Review/Close. The 'Edit Action Details' form below it includes fields for Date, Review date, Closed date (circled in red), Domain, Concerns and Worries, Strengths and Resources, Outcome, and Service. The 'Closed date' field in the 'Edit Action Details' form is circled in red, matching the 'Close date' field in the 'Actions' table.

9.5 Delete an Action within a Plan

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

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

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

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 'B Coordinator, FaCC Training 1'. The main navigation menu includes Home, Persons, Days, Cases, Reports, and Admin. The 'Supports' tab is selected, and the 'Create New Support / Brokerage' button is highlighted. The form is titled 'Edit Support/Brokerage Details' and contains the following fields:

- Date: 03/08/2016
- Worker/s: B Coordinator, FaCC Training 1
- Case Summary: Potato Family
- Support type: Emergency Relief (selected)
- Amount \$: (empty)
- Details: (empty)
- Payment: Approval (selected)
- Provider Name: (empty)
- Service Type: Please select...
- Expenditure type: Goods (selected)
- Brokerage code: (empty)
- Method of payment: Please select...
- Payment date: (empty)
- Last update: (empty)

A 'Save' button is located at the bottom right of the form.

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 e.g. 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**, e.g. 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' web application interface. At the top, it displays 'FaCC Training 1' and 'Peter Potato Male, DOB: 15/05/2005 (Age 11 yrs)'. The main navigation bar includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', and 'Documents'. The left sidebar has a 'Persons' menu with sub-items: 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. Below 'Admin' is a 'Recent List' with names: Peter Potato, Carissa Carrot, and Thomas Tomato. The main content area is titled 'Support/Brokerage' and contains a table with columns: 'Date', 'Worker / Type', 'Details', and 'Amount'. The table lists three entries for 'Medical Assessment', 'Participation in After School Care - FOC', and 'Medical supplies', with a total amount of '\$160.00'. An 'Export Support / Brokerages' button is located below the table. To the right is the 'Edit Support/Brokerage Details' form, which includes fields for 'Date', 'Worker/s', 'Case Summary', 'Support type', 'Amount', 'Details', 'Payment' (with 'Approval' sub-tab), 'Provider Name', 'Service Type', 'Expenditure type', 'Brokerage code', 'Method of payment', and 'Payment date'. The 'Last update' information is shown at the bottom of the form.

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.

This close-up screenshot shows the 'Approval' sub-tab of the 'Edit Support/Brokerage Details' form. The 'Approval' tab is circled in red. Below the tab, there are radio buttons for 'Approved' with 'Yes' selected and 'No' unselected. A text input field labeled 'Reason not approved' is present. Below this are three more input fields: 'Authorised by' (containing 'Mary Contrary'), 'Position' (containing 'Team Leader'), and 'Authorised date' (containing '05/05/2016'). At the bottom, it shows 'Last update A Coordinator, FaCC Training 1 05/05/2016 15:10:19' and 'Save' and 'Delete' buttons. A 'Print View' button is located at the bottom left of the form area.

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. To create a Task, on the **Persons** page, select the **Tasks** tab.
2. Click **Create New Task**.

The screenshot shows the 'supporting families' web application interface. The user is logged in as 'FaCC Training 1' for 'Carissa Carrot' (Female, DOB: 14/04/2006, Age 10 yrs). The 'Tasks' tab is selected in the top navigation bar. The 'Create New Task' button is highlighted with a red circle. The main content area displays a table of tasks with columns for Action Date, Start/End, Worker, and Task. The 'Edit Task Details' form on the right includes fields for Task date, Start time, End time, Worker/s, Task type, Notes, Send to calendar, This task is also associated with (tick), Created, Completed/Closed, and Last update. A 'Save' button is located at the bottom of the form.

3. Enter **Task date** and **times**.
4. The **Worker/s** field will default to the user entering the Task details. To add more workers, select the  icon. To delete workers, select the  icon.
5. Select **Task type** and add any **Notes**.
6. Select 'Yes' to **Send to calendar** if the task is to be sent as a Microsoft Outlook calendar invitation. All workers associated with the task will receive a Microsoft Outlook calendar invitation if their email address has been supplied via their User Preferences details.
7. Include related family members as relevant by checking the tickbox in the **This task is also associated with (tick)** : section
8. Click **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: 05/05/2016

Start time: 8:00 am

End time: 9:00 am

* Worker/s: A Coordinator, FaCC Training 1
B Coordinator, FaCC Training 1

* Task type: Review

Notes: Internal case review meeting

Send to calendar: Yes No

This task is also associated with (tick):
Charles Carrot Father

Created: 05/05/2016
Completed/Closed:

Last update: A Coordinator, FaCC Training 1
05/05/2016 15:12:59

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.

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

supporting families FaCC Training 1 Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

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

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

Action	Date	Start/End	Worker	Task
	05/05/2016	8:00 am - 9:00 am	A Coordinator	Review
	02/05/2016	7:00 am - 8:00 am	A Coordinator	Review
				Internal case review meeting
				Review file for Carrot family

Export Tasks 1 to 2 of 2

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

supporting families FaCC Training 1 Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)

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

Persons **Tasks:** Filter: Day Week **Month**

Calendar View: May 2016

Task details popup:
Review
Task Date: 05/05/2016
Start Time: 08:00 am
End Time: 09:00 am
Notes: Internal case review meeting
Workers / Workgroups:
A Coordinator, FaCC Training 1
B Coordinator, FaCC Training 1

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

Overdue Tasks are highlighted in pink – as below.

The screenshot shows the 'supporting families' web application interface. At the top, there's a header with the logo and user information: 'FaCC Training 1 Advice, Referral and Case Management (ARC) - Training' and 'B Coordinator (Coordinator)'. Below the header is a navigation bar with tabs: 'Home', 'My List', 'Team List', 'My Actions', 'Team Actions', 'Referrals', 'Service Directory', and 'Enquiry'. A sidebar on the left contains menu items: 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area displays a 'My Tasks' table with columns: 'Due Date', 'Time', 'Action Type', 'Workgroup', 'Person', 'Description', and 'Details'. Three tasks are listed, with the last two highlighted in pink. Below the table, there's a 'NOTE' and a 'Recent List' sidebar.

Due Date	Time	Action Type	Workgroup	Person	Description	Details
08/07/2016		Task	FaCC Training 1	Patricia Parsnip	Check-in with the Carrot Family	Go to Task
05/05/2016	08:00 AM	Task	FaCC Training 1	Carissa Carrot Patricia Parsnip	Internal case review meeting	Go to Task
02/05/2016	03:00 PM	Task	FaCC Training 1	Patricia Parsnip	Review file for Carrot Family	Go to Task

Additional Notes:

- Once a Task has been completed, record 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 date range, task Type or Worker.



The screenshot shows the 'Tasks' filter and list interface. At the top, there's a 'Tasks:' header with buttons for 'Filter', 'Calendar View', and 'Create New Task'. Below the header is a 'Filter:' section with fields for 'From:', 'To:', 'Type:', and 'Worker:'. Below the filter section is a table of tasks with columns: 'Action Date', 'Start/End', 'Worker', and 'Task'. Two tasks are listed. At the bottom left, there's an 'Export Tasks' button. At the bottom right, there's a page indicator '1 to 2 of 2'.

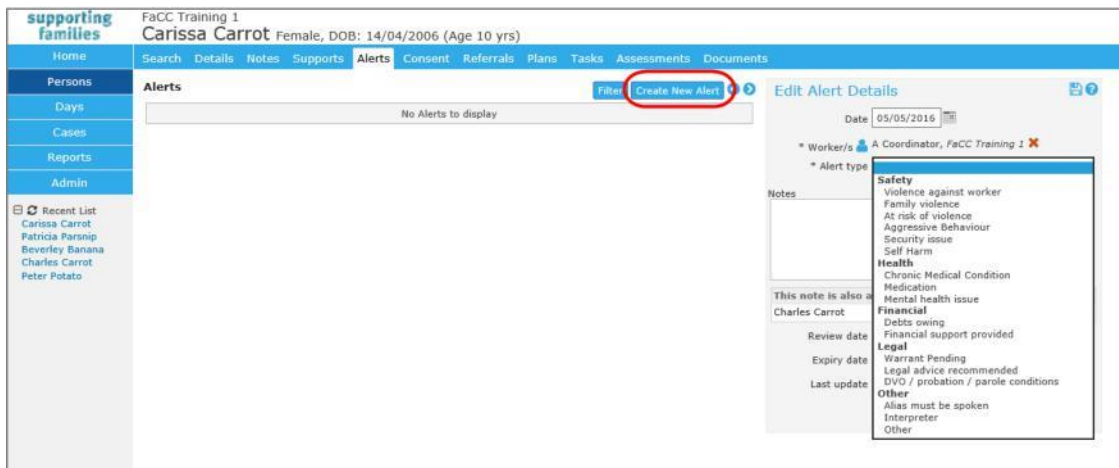
Action Date	Start/End	Worker	Task
05/05/2016	8:00 am 9:00 am	A Coordinator	Review Internal case review meeting
02/05/2016	3:00 pm 4:00 pm	A Coordinator	Review Review file for Carrot Family

- 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**
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 'FaCC Training 1' viewing the profile of 'Carissa Carrot' (Female, DOB: 14/04/2006, Age 10 yrs). The 'Alerts' tab is active, and the 'Create New Alert' button is highlighted with a red circle. The 'Edit Alert Details' form is open, showing a date of 05/05/2016 and a dropdown menu for 'Alert type' with options like Safety, Health, Financial, and Legal.

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 'FaCC Training 1' viewing the profile of 'Carissa Carrot' (Female, DOB: 14/04/2006, Age 10 yrs). A red warning icon is visible next to the name. The 'Edit Primary Details' form is open, showing fields for Given Name, Middle Name, and Family Name.

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 a referral to another service

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

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



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 :

Id	Send Date	Status	Sent From	Sent To	Sent By	Client
205	05/05/2016	Waiting	Hamilton Island FaCC FaCC Training 1	abc	D Coordinator	Natalie Cherry DOB: 31/07/2012 Gender: Female
204	05/05/2016	Waiting	Hamilton Island FaCC FaCC Training 1	RAI Beenleigh UCC Community	C User	Kiana Pineapple DOB: 17/05/1984 Gender: Female
203	05/05/2016	Waiting	Hamilton Island FaCC FaCC Training 1	RAI Logan UCC	B Coordinator	Janet Cherry DOB: 25/09/1987 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*, *IFS* or *FW*, to bring up the list of services within ARC.
4. Select the required service from the dropdown list which appears
5. Select **Submit**.


The screenshot shows the 'supporting families' interface. At the top, it identifies the user as 'Worker Two (Coordinator)' and the person as 'Peter Potato, Male, DOB: 15/05/2005 (Age 11 yrs)'. The 'Referrals' tab is active, displaying a table with one entry: ID 342, Referral Date 02/08/2016, Status Accepted, From FaCC - UAT Service, and To IFS - UAT Service. A 'Create new Referral' button is visible. A dropdown menu is open, showing 'Family Services' selected, with a list of services including 'IFS - Brisbane South', 'Churches of Christ Care', 'IFS Generic', and 'IFS - UAT Service'. The 'Submit' button is also highlighted.

The Referral form appears.

The screenshot shows the 'Referral' form. The status is 'New referral'. The 'From' field is 'FaCC - UAT Service' and the 'To' field is 'IFS - UAT Service'. The 'Service' field is 'IFS - UAT Service' and the 'Organisation' is 'IFS - UAT Service organisation'. The 'For' field is 'Peter Potato'. The 'Referred Persons' field is empty. The 'Details' section includes a 'Service Type' dropdown, a 'Presenting issues' text area, and an 'Additional Information' text area. The 'Attachments' and 'Referral History' sections are also visible. The 'Consent to send' field is set to 'Yes'.

6. Select **Service Type ***, then click **Save Draft**.
The message in the pink box below will appear if you attempt to save the Referral without selecting the relevant **Service Type**. **Service Type** is required for departmental reporting.

The screenshot shows a 'Referral' form with a pink error message at the top: 'Service Type field must be completed. Record was not saved.' The form includes fields for Status (New referral), From (FaCC - UAT Service), To (IFS - UAT Service), Service (IFS - UAT Service), Organisation (IFS - UAT Service organisation), and Referred Persons. A red box highlights the '* Service Type' dropdown menu. At the bottom, the 'Save Draft' button is 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 status 'Draft'. The 'Referred Persons' section is populated with 'Peter Potato'. A red circle highlights a plus icon (+) in the bottom right corner of the 'Referred Persons' section, indicating where to click to add more persons.

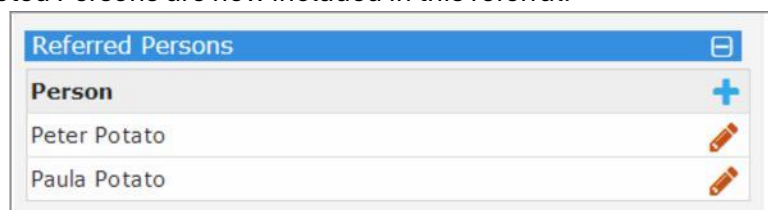
8. Using the **Related** search button, select the Persons to be included in the referral.

Note : It may be that only some of the Persons with whom relationships are held are included in the Case. Click **Save**.



Click **Save**.

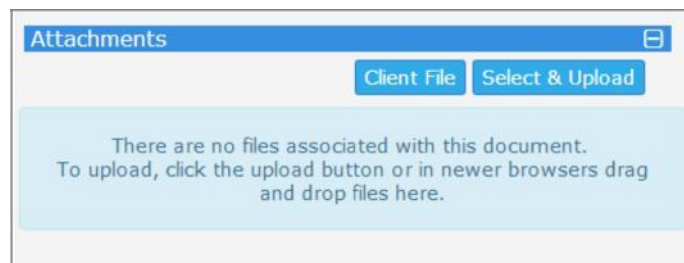
The selected Persons are now included in this referral.



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 open Case Summary is included in the Client File. A validation message will appear if there is no open Case Summary.
Select the **Page control**, **Order**, **Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes** and select **Attach file**.

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

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

13. To attach other documentation, expand the **Attachments** segment by selecting the icon. You can attach documentation from **Browse ! Select and Upload** files located on the your computer ! service network. (external to ARC)
14. Check **Consent to send*** has been provided.

- 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 for every Person included in the referral.

The screenshot shows the 'Referrals' tab for Peter Potato. A table lists a referral with ID 190, dated 02/03/2017, with a status of 'Waiting'. The 'Status' column is circled in red. The right-hand panel shows the details of this referral, including the service 'Hamilton Island IFS' and the organisation 'IFS Training 1'. The status 'Waiting' is also circled in red in the details panel.

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

The screenshot shows the 'Referrals' tab with the 'Sent' sub-tab selected and circled in red. Below the sub-tabs is a table of referrals. The first row shows a referral with ID 190, sent on 02/03/2017 at 18:04:45, with a status of 'Waiting'. The 'Sent From' is 'Hamilton Island FaCC' and the 'Sent To' is 'Hamilton Island IFS'. The 'Sent By' is 'A Coordinator' and the 'Client' is 'Peter Potato'. The 'Status' column is circled in red.

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

- If the Referral needs to be recalled, select **Recall**. This will only function while the Status is *Waiting*.

Once a referral is accepted, the user can create a **Copy** of the referral. This would be used in the instance where the user has to complete multiple referrals for the family.

12.1.2 Record a Manual Referral

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



The **actual** referral notification and documentation must be sent via channels external to ARC.

- 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 'FaCC - UAT Service' and 'Carissa Carrot Female, DOB: 14/04/2006 (Age 10 yrs)'. The navigation menu includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', and 'Documents'. The 'Referrals' section is active, showing 'This person has no history of referrals on record' and a 'Create new Referral' button. On the right, the 'Referral' form is visible, with the 'Manual' radio button selected and circled in red. The form fields include 'Service Name' (ABC Better Living), 'Program / Group', 'Organisation Name', 'Phone' (1234 9876), 'Fax', and 'Email'. The 'Submit' button is also circled in red.

The Referral form will appear.

NOTE: As highlighted in the message in the light blue box at the top of the form, the actual referral notification and documentation must be sent via channels external to ARC.

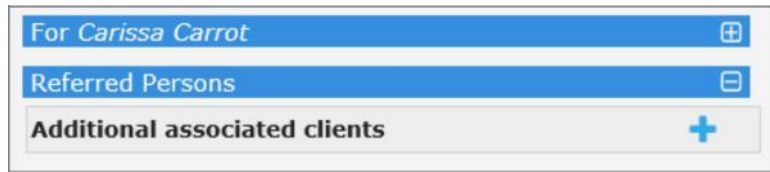
The screenshot shows the 'Referral' form with a warning message in a light blue box: 'This type of referral will NOT be sent electronically. You may wish to PDF the referral and send this manually to the destination service.' Below the warning, the form displays 'Referral sent' as '07/03/2017' and 'Status' as 'New referral'. The form is filled with the following information: 'From Hamilton Island FaCC', 'To ABC Better Living', 'Service: ABC Better Living', 'Program / Group', 'Organisation', 'Phone: 1234 9876', 'Fax', and 'Email'. There are also sections for 'For Carissa Carrot', 'Referred Persons', and 'Details'. A button says 'Please save record to associate clients'. At the bottom, there is a dropdown menu for '* Service Type'.


5. Select **Service Type*** value from the list. Click **Save Draft**.

The screenshot shows the '* Service Type' dropdown menu with the following list of options:

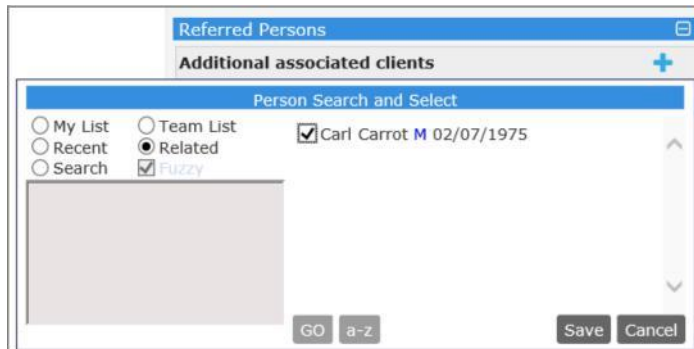
- Referred - CALD/Migrant support service
- Referred - Counselling - Financial
- Referred - Counselling - Relationship/Family
- Referred - DFV Service
- Referred - Disability Service
- Referred - Drug and Alcohol Service
- Referred - Education - Early Childhood Education and Care
- Referred - Education - school support
- Referred - Emergency relief/Financial support
- Referred - Employment and training services
- Referred - Family Support (not IFS)
- Referred - Health - CYMHS
- Referred - Health Visiting Program
- Referred - Housing and homelessness service
- Referred - Medical - Allied Health
- Referred - Medical - GP
- Referred - Medical - Paediatrician/Specialist
- Referred - Mental Health Service
- Referred - Parenting programs
- Referred - Youth service
- Referred - Other service


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

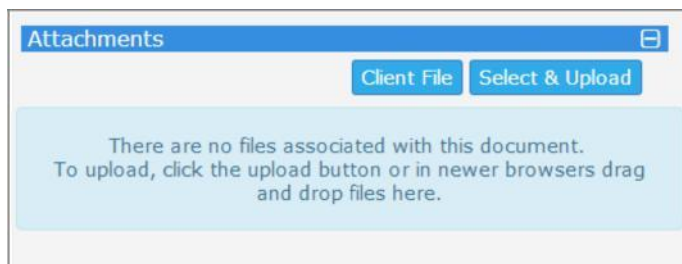


Click on the  icon to attach the other Persons in the Case to the

- 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.



- 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 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 must be included. Select the **Page control, Order, Export Period** (to define how the information will be displayed on the pdf) and include any **Additional notes** and select **Attach file**.

This file is now shown on the Referral form in the Attachments segment.

Any documents included in the Case Summary will also be automatically included in the referral. You can choose which document to record as having provided to the receiving service by deleting any using the red cross.

13. Check **Consent to send*** has been provided.
14. Set referral to **Waiting**.
15. Once the referral has been accepted (by way of a communication exchange outside of ARC), you must manually update the **Status** of the referral to **Accepted** or **Declined**.
The referral can also be modified or Recalled by selecting **Update** or **Recall**.

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 07/03/2017

Status Waiting

From Hamilton Island FaCC

To ABC Better Living

Service ABC Better Living

Phone 1234 9876

For Carissa Carrot

Referred Persons

Additional associated clients	Relationship
Carl Carrot	Father

Details

* **Service Type** Referred - Other service

Attachments

File Name	Uploaded
client_file_2283.pdf	07/03/2017 17:59:53
client_file_1_Original referral.pdf	07/03/2017 17:59:53
client_file_2_CSS Report card.docx	07/03/2017 17:59:53

Referral History

Consent to send Yes

Comment

Linked Enquiry

[Create New](#)

There are no records associated.

Status to: [Update](#) [Recall](#) [PDF](#) [Accepted](#) [Declined](#)

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

16. Once a referral is **Accepted**, the user can create a **Copy** of the referral. This would be used in the instance where the user has to complete multiple referrals.
17. The Sent referral will show on the **Person** page, **Referral** tab for every Person included in the referral AND on the **Home** Page, **Referrals** tab, **Sent** sub-tab.

supporting families		FaCC Training 1																			
		Carissa Carrot Male, DOB: 14/04/2006 (Age 10 yrs)																			
Home		Search Details Notes Supports Alerts Consent Referrals Plans																			
Persons		Referrals Create new Referral																			
Days		<table border="1"> <thead> <tr> <th>Id</th> <th>Referral Date</th> <th>Status</th> <th>From</th> <th>To</th> </tr> </thead> <tbody> <tr> <td>206</td> <td>07/03/2017</td> <td>Accepted</td> <td>Hamilton Island FaCC FaCC Training 1</td> <td>Hamilton Island IFS IFS Training 1</td> </tr> <tr> <td>208</td> <td>07/03/2017</td> <td>Waiting</td> <td>Hamilton Island FaCC FaCC Training 1</td> <td>ABC Better Living</td> </tr> </tbody> </table>					Id	Referral Date	Status	From	To	206	07/03/2017	Accepted	Hamilton Island FaCC FaCC Training 1	Hamilton Island IFS IFS Training 1	208	07/03/2017	Waiting	Hamilton Island FaCC FaCC Training 1	ABC Better Living
Id	Referral Date	Status	From	To																	
206	07/03/2017	Accepted	Hamilton Island FaCC FaCC Training 1	Hamilton Island IFS IFS Training 1																	
208	07/03/2017	Waiting	Hamilton Island FaCC FaCC Training 1	ABC Better Living																	
Cases																					
Reports																					
Admin																					



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

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

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

Note: If you search via suburb, type as "Suburb", click **Search**.

3. Select Appropriate Service from the List and select **Make a referral**.



The Referral form will appear.

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 03/08/2016

Status New referral

From FaCC - 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 Peter Passionfruit

Referred Persons

Please save record to associate clients

Details

* Service Type

4. Complete by following steps 5 – 16 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 (in your service) manually updating the Status
- for *Family Services Referrals* – by the other service in ARC.

The screenshot shows the 'supporting families' web interface. At the top, it displays 'FaCC - UAT Service' and 'Peter Passionfruit Male, DOB: 20/01/2010 (Age 6 yrs)'. The navigation menu includes Home, Persons, Days, Cases, Reports, and Admin. The 'Referrals' tab is active, showing a table of referrals. One referral with ID 334, dated 01/08/2016, is highlighted in red and has a status of 'Declined'. The 'View Recalled and Declined' link is also circled in red. To the right, the detailed view of this referral is shown, with the 'Status Declined' field circled in red. The 'Reason declined' is listed as 'Insufficient information to assess referral'. There are buttons for 'PDF' and 'Copy' at the bottom.

Id	Referral Date	Status	From	To
335	03/08/2016	Waiting	FaCC - UAT Service FaCC - UAT Service organisation	IFS - UAT Service IFS - UAT Service organisation
334	01/08/2016	Declined	FaCC - UAT Service FaCC - UAT Service organisation	IFS - UAT Service IFS - UAT Service organisation

12.2 Receiving Referrals

Referrals received from another service using ARC or submitted by members of the public, professionals or Child Safety using the *family support 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 (i.e. are in Draft format) can be viewed by clicking the relevant sub-tab.

12.2.1 To accept a Referral

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

The screenshot shows the 'supporting families' interface. The top navigation bar includes 'Home', 'My List', 'Team List', 'My Actions', 'Team Actions', 'Referrals', 'Service Directory', and 'Enquiry'. The 'Referrals' sub-tab is selected and highlighted with a red circle. Below the navigation, a table lists referrals with columns for 'Id', 'Send Date', 'Status', 'Sent From', 'Sent By', and 'Client'. Two referrals are visible: ID 185 (sent 02/03/2017 13:30:53, status 'Waiting', sent from 'Hamilton Island IFS IFS Training 1') and ID 182 (sent 02/03/2017 09:18:28, status 'Waiting', sent from 'familychildconnect online'). A blue document icon next to ID 182 is circled in red.

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

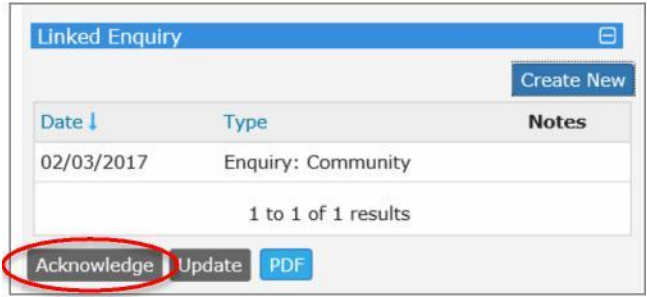
The screenshot shows the 'Referral' form. The left sidebar contains navigation options like 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area is divided into several sections with blue headers: 'Link referral to database', 'Additional associated clients', 'Risk/Safety', 'Family Support', 'Attachments', 'Referral History', and 'Linked Enquiry'. The 'Additional associated clients' section shows 'Mary Mushroom' as the mother. The 'Risk/Safety' section contains a question about domestic violence. The 'Family Support' section contains a question about family support. The 'Attachments' section shows an uploaded file 'Referral_Q2QD-54CS.pdf'. The 'Linked Enquiry' section shows 'There are no records associated with this referral'. A red circle highlights the 'Create New' button at the bottom right.

The referral form contains a number of sections displaying relevant information, as marked by the blue bars.

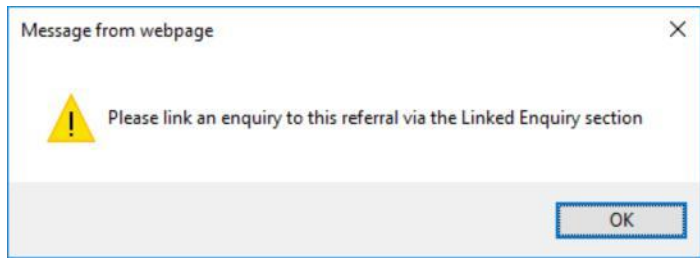
To streamline the recording of enquiries for FaCC services, there is a link to the Enquiry.



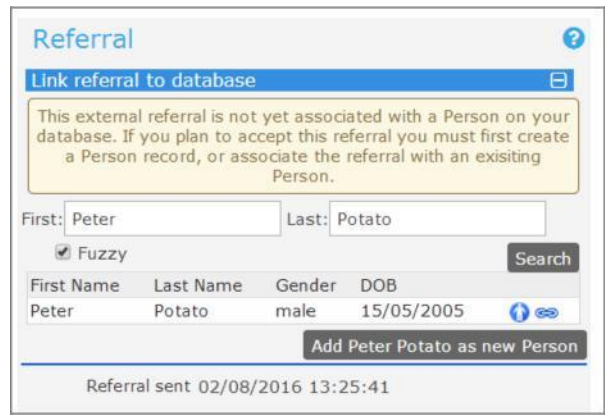
Click **Create New** to open the Enquiry form, complete relevant details and close. Once the Enquiry is completed, the referral form will reflect that record.



If you attempt to action the referral prior to completing an enquiry, the following message will appear.



2. Click **Acknowledge**, at the bottom of the referral form.
3. ARC automatically searches your workgroup and identifies if the referred client/s have an existing Person record in your workgroup.



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

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

Where it is received for the same Person (an exact match), the blue person icon will appear – as below.

supporting families FaCC - UAT Service Advice, Referral and Case Management (ARC)						
Home My List Team List My Actions Team Actions Referrals Service Directory Enquiry						
Persons Received Accepted Declined Sent Draft						
Referrals						
	Id ↓	Send Date	Status	Sent From	Sent By	Client
	355	03/08/2016 16:57:33	Acknowledged	IFS - UAT Service IFS - UAT Service organisation	Worker Two	Peter Potato DOB: 15/05/2005 Gender: Male
	353	03/08/2016 16:42:06	Waiting	IFS - UAT Service IFS - UAT Service organisation	Worker Two	Alan Robinhood DOB: 20/01/2010 Gender: Male

- If the referral is for a new client, select **Add < Name> as a new Person**. The procedures developed by your service may involve review of the [client file](#) in determining whether to Accept or Decline the referral.

For referrals from other services within ARC, **Accept** or **Decline** the Referral.

File Name	Uploaded
client_file_3374.pdf	05/05/2017 14:14:36 AEST

Date ↓	Type	Notes
05/05/2017	Enquiry: Community	Self-referral

1 to 1 of 1 results

Update Accept Decline PDF

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



- For referrals from *familysupportreferral*, **Accept** the Referral.

Referrals from *familysupportreferral* 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.

A PDF of the completed online form is attached to the referral in ARC :

Attachments	
File Name	Uploaded
Referral_Q2QD-54C6.pdf	02/03/2017 09:18:29

4. 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.

Referred Persons	
Person	
Alan Robinhood	
Maid Maryon	
Robert Robinhood	

The following message will appear :

When you click **OK**, a new Person record will be created in your workgroup for that person

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

and the Referral form will display as below:.

Referred Persons	
Person Linked	
Person	
Alan Robinhood	
Maid Maryon	
Robert Robinhood	

IMPORTANT NOTE : In this example, a **Person** record for Maid Maryon and Robert Robinhood have now been created in your workgroup.

This referral will appear on every **Person** record (in the **Referrals** tab) as included in the referral.

5. 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 Person s page, Details tab - create the **Case Summary**.

NOTE : The referral is now attached to every Person associated with the referral. This can streamline procedures within your service by not having to copy documents to your network folder in order to attach to the Case Summary.

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

The screenshot shows the 'supporting families' interface. The top navigation bar includes 'Home', 'My List', 'Team List', 'My Actions', 'Team Actions', 'Referrals', 'Service Directory', and 'Enquiries'. The left sidebar contains navigation options: 'Persons', 'Days', 'Cases', 'Reports', 'Admin', and a 'Recent List' with names like Peter Potato, Carissa Carrot, Cedric Cucumber, and Thomas Books. The main content area is titled 'FaCC Training 1 Advice, Referral and Case Management (ARC) - Trainin'. Below the title, there are tabs for 'Received', 'Accepted' (circled in red), 'Declined', 'Sent', and 'Draft'. A 'Referrals' table is displayed with columns: 'Id', 'Send Date', 'Status', 'Sent From', 'Sent By', and 'Client'. Two referrals are listed:

Id	Send Date	Status	Sent From	Sent By	Client
182	02/03/2017 09:18:28	Accepted Q2QD-S4C6	familychildconnect online	Mary Mushroom	Michael Mushroom DOB: 20/01/2004 Gender: male
181	02/03/2017 08:44:32	Accepted 2222-SSCF	familychildconnect online	Scott Stevens	Thomas Books DOB: 12/10/2001 Gender: male

The referral also shows on the **Person** page, **Referrals** tab for every Person included in the referral.

The screenshot shows the 'supporting families' interface for a specific person. The top navigation bar includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', and 'Documents'. The left sidebar contains navigation options: 'Persons', 'Days', 'Cases', 'Reports', 'Admin'. The main content area is titled 'FaCC Training 1 Michael Mushroom Male, DOB: 20/01/2004 (Age 13 yrs)'. Below the title, there are tabs for 'Referrals', 'Plans', 'Tasks', 'Assessments', and 'Documents'. A 'Referrals' table is displayed with columns: 'Id', 'Referral Date', 'Status', 'From', and 'To'. One referral is listed:

Id	Referral Date	Status	From	To
2294	02/03/2017	Accepted	familychildconnect online	FaCC Training 1 Hamilton Island FaCC

Additional Notes:

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

Currently, a worker’s **My List** only displays **Person** records for which they have been allocated as Key Worker.

12.2.2 To decline a Referral

The specific procedures will be as defined by your service.

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

The screenshot shows the 'supporting families' web application interface. On the left is a navigation menu with options like Home, Persons, Days, Cases, Reports, and Admin. The main area displays a 'Referrals' table with columns for Id, Send Date, Status, Sent From, Sent By, and Client. Two referrals are listed, with the first one (Id 357) circled in red. To the right, a detailed 'Referral' form is visible, showing fields for First Name, Last Name, Gender, and DOB. At the bottom of the form, the 'Acknowledge' button is circled in red.

2. Click **Acknowledge** to update **Status** as you are considering the referral.
3. When the 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

4. Select **Reason declined** from drop-down values (at the bottom of the form), then click **Decline**.

The screenshot shows the 'Referral History' form. It includes a 'Consent to send' checkbox, a 'Comment' text area, and a 'Reason declined' dropdown menu. The dropdown menu is open, showing several options: 'No capacity at this time', 'Does not meet eligibility requirements', 'Insufficient information to assess referral', 'Outside catchment area', and 'Other reason for declining referral'. At the bottom of the form, the 'Decline' button is circled in red.

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



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



13 Managing Restricted Access

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

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

13.1 Apply Restricted Access

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

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

- Open **Person** Page and display **Details** tab for the Person record requiring access to be restricted.

Click the **Restriction** button at the bottom.

supporting families FaCC - UAT Service
Carissa Carrot Female, DOB: 14/04/2006 (Age 12 yrs)

Home Search **Details** Notes Supports Alerts Consent Referrals Pl...

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

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Carmine Carrot	Mother	02/02/1980	
Charles Carrot	Brother	04/10/2012	

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

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

Description	Role	Workgroup	Start	Last Update
Case Summary Carrot Family	Other	FaCC - UAT Service	27/03/2018	24/04/2018

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

Street	Locality	Type	Comments	Last Update
✓ 37 Pelican Drive	STANTHORPE QLD 4380	Home		24/04/2018
172 Golf Drive	QUILPIE QLD 4480	Alternative	For stays with her Mother	03/08/2016

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

Contact	Type	Comments	Last Update
4545 6565	Phone (Hm)		03/08/2016
0444 555 666	Mobile	For Charles	03/08/2016

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

Worker	Workgroup	Role	Comments
Carly Cumquat	Children at Play	Behavioural Specialist	
Worker Two	FaCC - UAT Service	Support worker	

Family name search [GO](#)

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

2. The following screen will appear :

User restrictions for Carissa Carrot and all related p... ✕

Select users who may NOT view these persons' records.

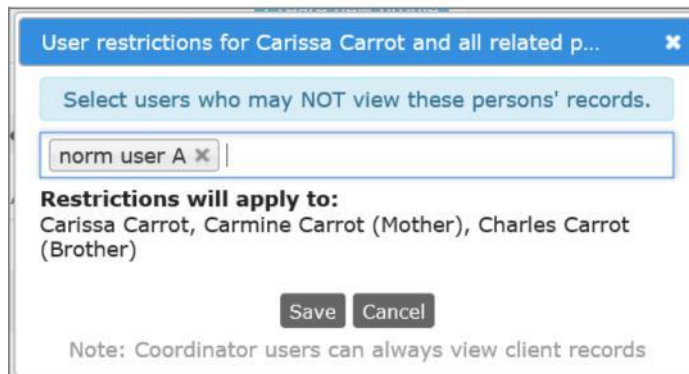
Select users

Restrictions will apply to:
 Carissa Carrot, Carmine Carrot (Mother), Charles Carrot (Brother)

[Save](#) [Cancel](#)

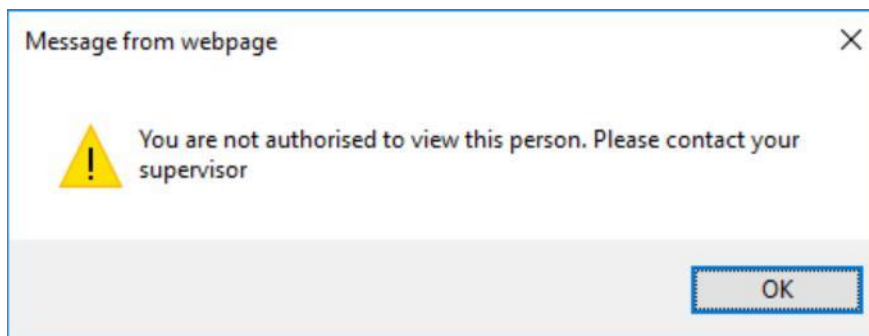
Note: Coordinator users can always view client records

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



Click **Save**.

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



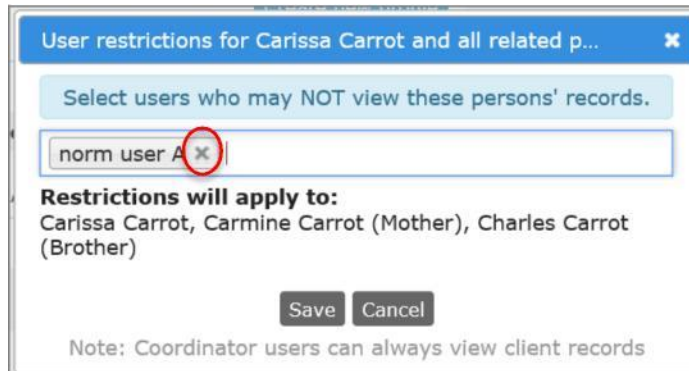
Key points :

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

13.2 Remove Restricted Access

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

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



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

13.3 Restricted Access Audit Log

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

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

Select the date range you wish to view restricted access activities for

The **Worker** field refers to the User who applied or removed the restriction.

The **Person ID** field is the numerical *Person Identifier* for the Person record for whom access has been restricted.

Auditlog Id	Workgroup	Cluster	Access	Worker	Restricted Worker	Restricted Client Id	Action	Date Time	Then Restriction Id
1306	FaCC - UAT Service	FaCC - UAT Service	prohibit	Worker Two	norm user A	3158	added	04/05/2018 11:29:30	309

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 Days

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



14.1 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.



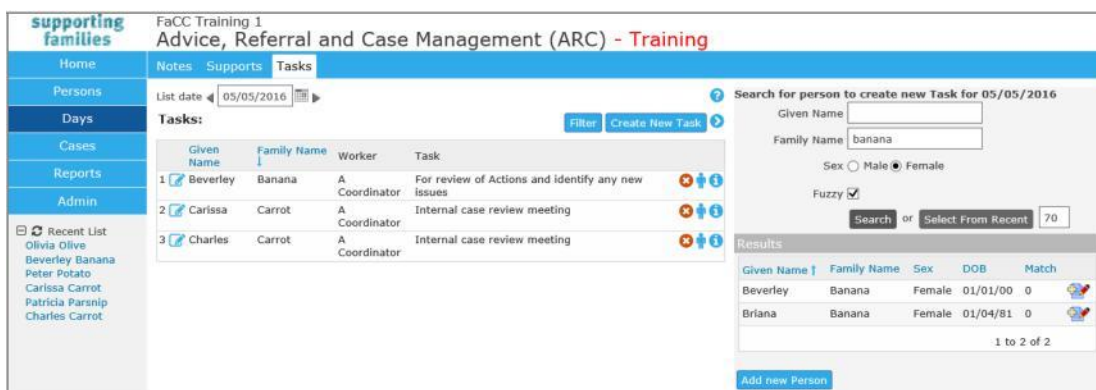
Click the  icon to open the record. Click the  icon to open the **Person** record.

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

If a Note or Task is associated with more than one Person, it will appear multiple times.

14.2 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.

15 Documents

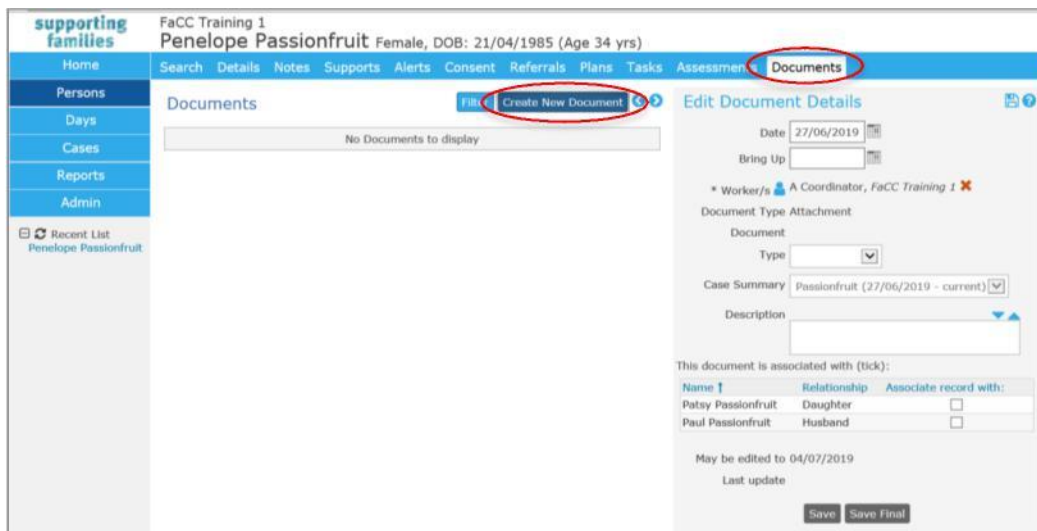
Documents may be associated with a Person record in two ways:

- [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.

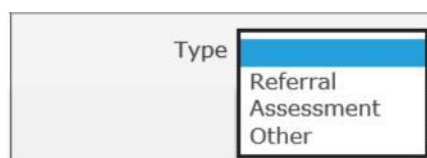
15.1 To attach a document to a Person record

1. From the **Persons** page, select the **Documents** tab.

Click **Create New Document** and the [Edit Document Details](#) form will appear to the right of screen.



2. **Date** defaults to today's date – an alternative date can be selected by clicking the calendar icon.
3. Enter the **Bring Up** (review) date by clicking the calendar icon, if required.
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** from drop down list :



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).
8. **Associated with** : Only where relevant, indicate related persons for this document. The document will also appear in their Person record.
9. Click **Save**.
10. The **Select File...** button (highlighted below) will now be available to select the document you wish to attach.

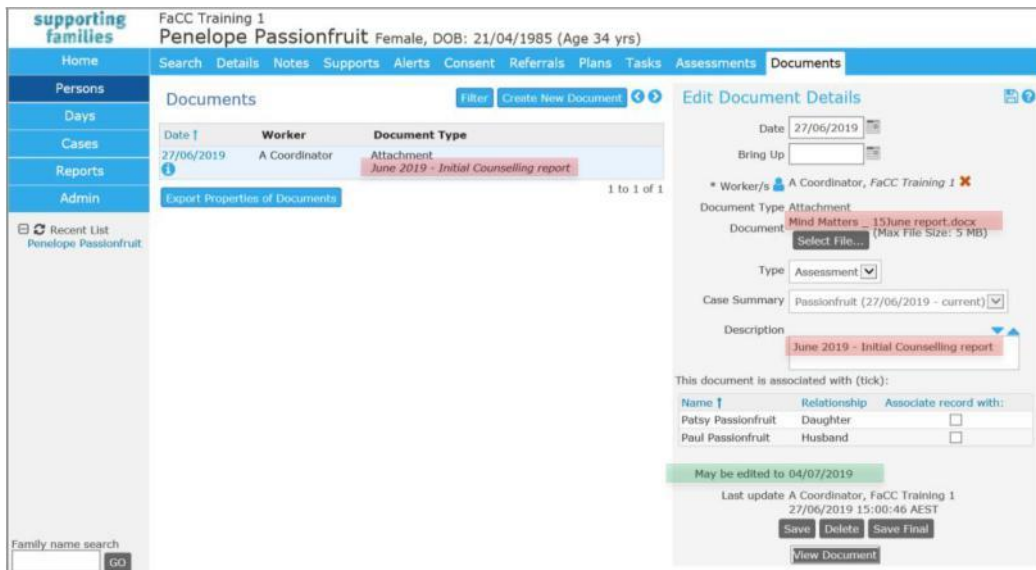
The screenshot shows the 'supporting families' web application interface. At the top, the user is logged in as 'FaCC Training 1 Penelope Passionfruit Female, DOB: 21/04/1985 (Age 34 yrs)'. The main navigation bar includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', and 'Documents'. The left sidebar contains 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area is titled 'Documents' and shows a table with columns for 'Date', 'Worker', and 'Document Type'. A single document is listed: '27/06/2019', 'A Coordinator', and 'Attachment June 2019 - Initial Counselling report'. Below the table is an 'Export Properties of Documents' button. The right sidebar is titled 'Edit Document Details' and contains a form with fields for 'Date' (27/06/2019), 'Bring Up', 'Document Type' (Attachment), 'Document' (with a highlighted 'Select File...' button), 'Type' (Assessment), 'Case Summary' (Passionfruit (27/06/2019 - current)), and 'Description' (June 2019 - Initial Counselling report). Below the form is a section for 'This document is associated with (tick):' with a table listing 'Patsy Passionfruit' (Daughter) and 'Paul Passionfruit' (Husband), each with an 'Associate record with:' checkbox. 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 the 'Upload File' dialog box. It has a title bar with the 'supporting families' logo. The main content area contains a 'Select File' text input field followed by a 'Browse...' button and '(Max File Size: 5 MB)'. Below this are 'Upload File' and 'Cancel' buttons. At the bottom, there is an 'Instructions' section with a bulleted list:

- 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**. 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/yyyy*. If you click **Save Final**, it will lock the record immediately.



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

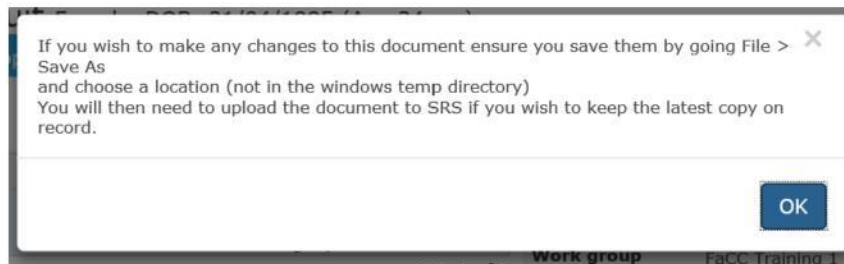
15.2 Viewing & Changing Documents

15.2.1 To view the document

1. Click **View Document**.

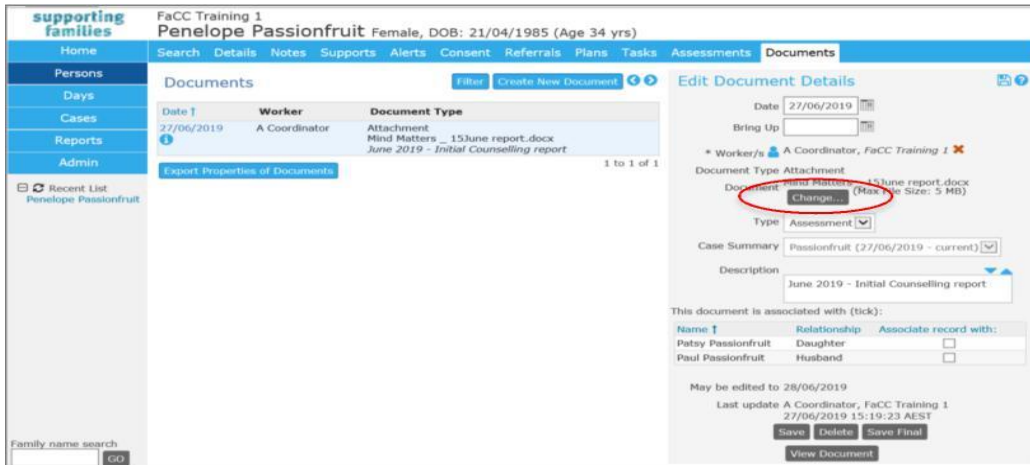
Document Details	
Date	27/06/2019
Bring Up	
Worker/s	A Coordinator, FaCC Training 1
Work group	FaCC Training 1
Type	Attachment
Type	Assessment
Case Summary	Passionfruit
Document Name	Mind Matters _ 15June report.docx
Description	June 2019 - Initial Counselling report
Last update	A Coordinator, FaCC Training 1 27/06/2019 15:09:37 AEST
Edit locked	27/06/2019  View Document

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 reattach the modified document. Click ok

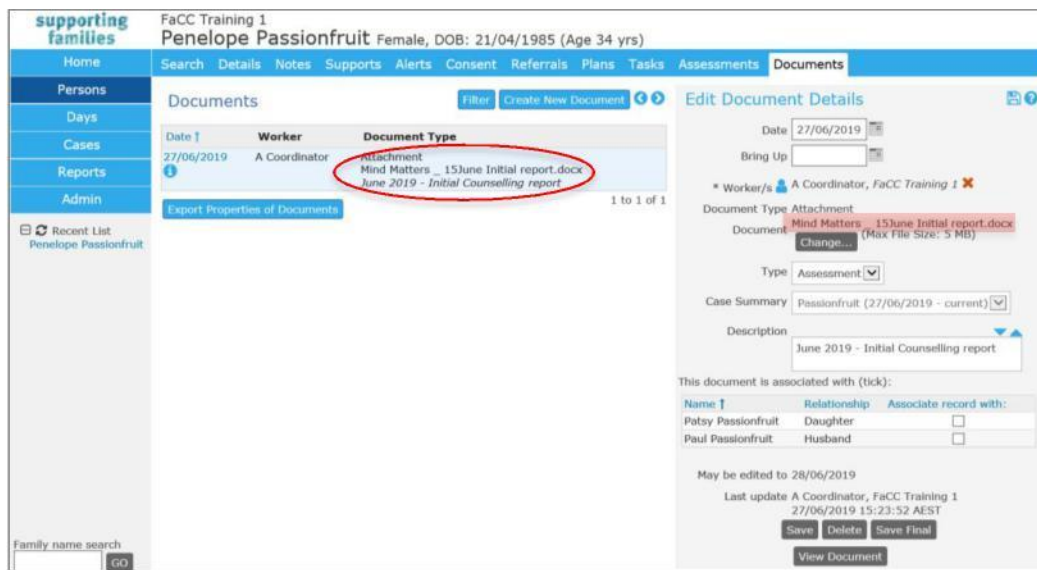


15.2.2 To change the document:

1. The Document record cannot be locked to perform this task. Click the document date displayed in blue and the **Edit Document Details** form will appear to the right of screen.
2. Click **Change...** and locate the required new file via the dialog box.



3. Upload and click **Save**. 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.



15.3 Merging Documents

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

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

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

Additional Notes:

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

15.4 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.

Last update A Coordinator, FaCC Training 1
27/06/2019 15:23:52 AEST

Save Delete Save Final

View Document

15.5 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.

To attach a document to an object, complete the object and save.

The option to attach a document will appear:

The image shows two side-by-side screenshots of web forms. The left form is titled 'Edit Note Details' and the right is 'Edit Support/Brokerage Details'. Both forms have a red circle around the 'Attach Document Select & Upload' button at the bottom. The 'Edit Note Details' form includes fields for Activity Date (20/08/2024), Worker/s (Allison Scanlan, IFS - UAT Service), Activity Type (Accommodation support), and Case Summary (jones case 2 (06/06/2023 - current)). It also has a Notes section with the text 'I visited the family to discuss their current living situation.' and a list of service categories. The 'Edit Support/Brokerage Details' form includes fields for Date (20/08/2024), Worker/s (Allison Scanlan, IFS - UAT Service), Support type (Brokerage), Case Summary (jones case 2 (06/06/2023 - current)), Amount (\$ 50.00), and Details (Electricity bill). It also has sections for Payment and Approval, including Provider Name (Energen), Service Type (Financial and material assistance), Expenditure type (Goods), Brokerage code, Method of payment (Credit Card), and Payment date.

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

16 Reports

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

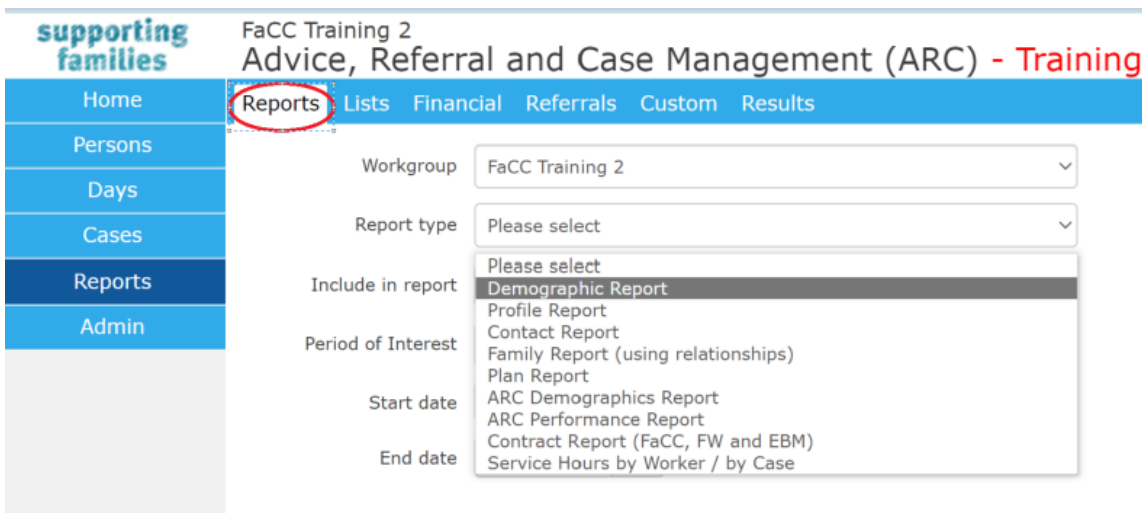
There are a number of distinct tabs within the Reports Page identifying the different report categories: Reports, Lists, Financial, Referrals, Groups, Custom and Results.

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

16.1 Reports

Reports are located in several tabs within the **Reports** page :

16.1.1 Reports tab



From the **Reports** tab you can generate a number of reports. Some of these are generic to the SRS product.

The **ARC Performance Report**, **Contract Report**, **ARC Demographics report** and **Service Hours by Worker/by Case** 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 OASIS 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

16.1.2 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 screenshot shows the 'supporting families' software interface. The top navigation bar includes 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The 'Reports' section is expanded, showing 'Reports', 'Lists', 'Financial', 'Referrals', 'Custom', and 'Results'. The 'Lists' tab is selected. The main content area shows a form for generating a list. The 'List type' dropdown menu is open, displaying the following options: 'Please select...', 'Demographic Details', 'Profile Details (by person)', 'Profile Details (by profile)', 'Contact Details (by person)', 'Contact Details (by contact)', 'Contact Totals (by person)', 'Family List (using relationships)', 'Outcomes', 'Payments', 'Payments (by family)', 'Plans', 'Contract Summary', 'ARC Performance List', and 'OASIS List'. The 'Contract Summary', 'ARC Performance List', and 'OASIS List' options are highlighted with a red box.

The **ARC Performance List** and **Contract 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.

16.1.3 Financials tab

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

16.1.4 Referrals tab

The Referrals tab allows you to generate reports about :

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

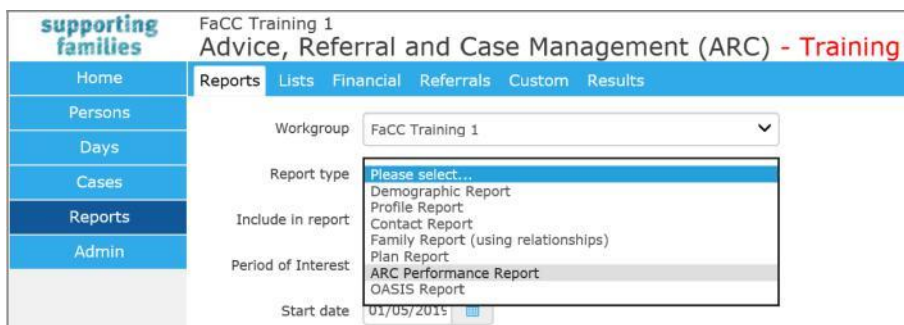
16.1.5 Custom tab

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.

16.2 Generating Reports

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



The screenshot shows the 'supporting families' interface. The 'Reports' tab is active. A dropdown menu for 'Report type' is open, showing several options. 'ARC Performance Report' is selected and highlighted. The 'Workgroup' is 'FaCC Training 1' and the 'Start date' is '01/05/2015'.

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



The screenshot shows the 'supporting families' interface. The 'Reports' tab is active. The 'Report type' is set to 'ARC Performance Report'. The 'Period of Interest' dropdown menu is open, showing a list of time-based options. 'This Month' is highlighted.

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).

16.3 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 2095 27/06/2019 15:42	A Coordinator	0.631628 secs	From: 01/05/2019 To: 31/05/2019	FaCC Training 1	ARC Performance Report		Delete Report View Report

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

ARC PERFORMANCE REPORT (FaCC)

Report Information	
Service Name	FaCC Training 1
Service Outlet Number	6
Organisation Name	FaCC Training 1
Service Type No	T347
Service Type	Family and Child Connect
Service Type Name	Community Based Intake and Referral
Reporting Period Start Date	01/05/2019
Reporting Period End Date	31/05/2019

FAMILY AND CHILD CONNECT PERFORMANCE MEASURES

ENQUIRIES

1. Enquiries received by Source

	Indigenous	Non-indigenous	Total
Aboriginal and Torres Strait Islander - Family Wellbeing (ATSI-FW)	0	0	0
Child Safety - Regional Intake Service (RIS)	0	0	0

- 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.

16.4 Exporting Report Results

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

1. From the View Results screen, as above, click the **Excel** icon
2. At the bottom of your screen, select either **Open**, **Save** or **Cancel**

The screenshot shows the 'supporting families' web application interface. The main content area displays the 'ARC PERFORMANCE REPORT (FaCC)' for 'FaCC Training 1'. Below the report information, there is a table titled 'FAMILY AND CHILD CONNECT PERFORMANCE MEASURES ENQUIRIES' with the following data:

1. Enquiries received by Source	Indigenous	Non-Indigenous	Total
Aboriginal and Torres Strait Islander - Family Wellbeing (ATSI-FW)	0	0	0
Child Safety - Regional Intake Service (RIS)	0	0	0
Child Safety Service Centre (CSSC)	0	0	0
Community/Friend/Family Connective Services			

A dialog box at the bottom right asks: 'Do you want to open or save srsreport.xls from us-qld-families-training.info@hangeppps.net.au?'. The 'Open' button is circled in red.

The results are displayed in Excel. This allows you to sort and analyse your data as you require.

The screenshot shows the Excel spreadsheet 'srsreport.xls [Read-Only] - Excel'. The data is organized as follows:

- Row 1: Report title and ID: 'Advice, Referrals and Case Management (ARC), ARC Performance Report (FaCC) ID: 2095 - for period 01/05/2019 to 31/05/2019. 1. This report was run at 27/06/2019 15:42:47 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.'
- Row 4: Section header 'ARC PERFORMANCE REPORT (FaCC)'
- Row 7: Start of 'Report Information' table.
- Row 16: Start of 'FAMILY AND CHILD CONNECT PERFORMANCE MEASURES ENQUIRIES' table.

17 Admin Page

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

Users with a Coordinator access level will have additional access to manage user accounts and perform other administrative functions as detailed in Section 17 of this Manual.

17.1 Change Password

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

To change your password:

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

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

Persons 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.

Days

Cases

Reports

Admin

Passwords need to comply with the following rules:

- Must contain at least 10 characters.
- Must contain at least 1 upper-case letter, 1 lower-case letter, 1 number and 1 symbol.
- The allowed symbols are @ # \$ % ^ & * () . - : ' / ! = + \ | ` ~ [] { } ; " < > , ?

- It cannot be the same as your current password.

Current Password

New Password

Confirm Password

Save

1. Enter your New Password and enter again in the Confirm Password field.
The password must be at least 10 characters in length and 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.
- The above screenshot reflects the Admin page for a user with Coordinator access. A user with Normal access will have fewer tabs.

17.2 User Preferences

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

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

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

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

Note: The Email address and Security question are mandatory.

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

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

Persons

Days

Cases

Reports

Admin

User Preferences for A Coordinator

Email Address

Phone

Mobile

Fax

Title

Position

Organisation

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

Security question

Security response

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

I do not wish to receive these emails

Save Cancel

Message from webpage

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

OK

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

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

Persons

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Admin

Document List

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

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

18 Coordinator Functions

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

18.1 User Management

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

User Name ↑	User	Date Commenced	End Date	Last Logon
amanda.suitor	Amanda Suitor	05/02/2016		29/11/2016
Amodha	Amodha Ratnayeke	01/07/2007		07/11/2016
coordinator	co ordinator	13/09/2016		10/02/2017
damien.fallon	Damien Fallon	07/07/2016		

18.1.1 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, FaCC Workgroup has 22 named users and 2 spare licences. This means there are currently 20 allocated users.

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

If you require additional licences, please contact the 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

User Name	User	Date Commenced	End Date	Last Login
amanda.sultor	Amanda Sultor	05/02/2016		23/11/2016
amodia	Amodia Rabnayeke	01/07/2007		09/11/2016
coordinator	coordinator	13/09/2016		10/02/2017
damien.fallon	Damien Fallon	07/07/2016		
deb2	deb test	03/03/2016		19/10/2016
deborah.babulal	Deborah Babulal	10/02/2016		12/12/2016
framashai	Faraz Rameshni	24/09/2015		13/02/2017

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 user is not in any workgroup.

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

Step 3: Allocate to a workgroup:

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

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

Step 4: Allocate the access level:

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	x	✓

Unlock Notes	X	✓
Create/ Manage Referrals	✓	✓
Performance reporting – basic	✓	✓
Performance reporting – advanced	X	✓
Merge Clients/ Persons	X	✓
Auditing	X	✓
Manage document templates	X	✓
Manage Users	X	✓

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.

18.1.2 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.

Edit user record:

* User Name Carl.Carrot
 * First Name Carl
 * Last Name Carrot
 Email Address
 * Default Cluster FaCC - UAT Service
 Start Date 13/02/2017
 New Password
 Confirm Password
 User Blocked
 Change password

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

Add to workgroup Please select...
 Last Update Worker Two, FaCC - UAT Service 13/02/2017 17:26:39
 Save

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

18.1.3 Unblocking a User Account

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

Edit user record:

* User Name Carl.Carrot
 * First Name Carl
 * Last Name Carrot
 Email Address
 * Default Cluster FaCC - UAT Service
 Start Date 13/02/2017
 New Password
 Confirm Password
 User Blocked
 Change password

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

Add to workgroup Please select...
 Last Update Worker Two, FaCC - UAT Service 13/02/2017 17:26:39
 Save

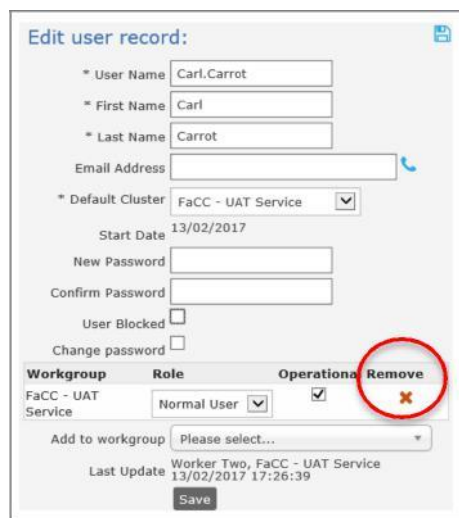
The user account can be unblocked by simply unchecking the **User Blocked** check box (highlighted above) and clicking **Save**.

18.1.4 Removing User Access

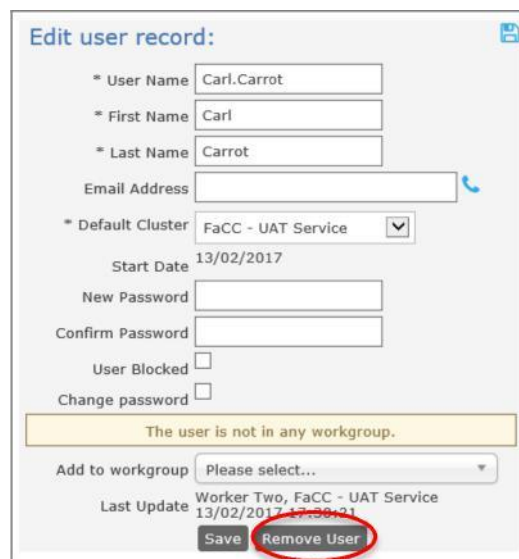
When a staff member leaves your service, you have a choice as to how you manage their User record within ARC. The steps outlined below address the User management functions – all records made by this User within ARC are retained.

Important: The department undertakes 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 user 'Carl.Carrot'. The form includes fields for User Name, First Name, Last Name, Email Address, Default Cluster (FaCC - UAT Service), Start Date (13/02/2017), New Password, Confirm Password, User Blocked, and Change password. Below these fields is a table with columns for Workgroup, Role, Operations, and Remove. The 'Remove' column contains a red 'X' icon, which is circled in red. The 'Add to workgroup' dropdown is set to 'Please select...'. The 'Last Update' field shows 'Worker Two, FaCC - UAT Service' on '13/02/2017 17:26:39'. A 'Save' button is at the bottom.



The screenshot shows the 'Edit user record' form for user 'Carl.Carrot'. The form includes fields for User Name, First Name, Last Name, Email Address, Default Cluster (FaCC - UAT Service), Start Date (13/02/2017), New Password, Confirm Password, User Blocked, and Change password. Below these fields is a yellow warning box that says 'The user is not in any workgroup.' The 'Add to workgroup' dropdown is set to 'Please select...'. The 'Last Update' field shows 'Worker Two, FaCC - UAT Service' on '13/02/2017 17:30:21'. At the bottom, there are 'Save' and 'Remove User' buttons, 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.

18.2 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.

18.2.1 To Search for duplicate records

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



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

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

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.



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.

18.2.2 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
2322	Beverley	Banana	F	01/01/2000	0	Open Select
2336	Beverley	Banana	F	01/01/2000	0	Open Select
2323	Briana	Banana	F	01/04/1981	0	Open Select
2324	Byron	Banana	M	02/01/2005	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.

Person / Alias: Beverley Banana Primary Name

Given Name: Beverley

Middle Name:

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

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

The screenshot shows the 'supporting families' web application interface. The main navigation menu includes Home, Persons, Days, Cases, Reports, and Admin. The current page is titled 'FaCC Training 1 Advice, Referral and Case Management (ARC) - Training' and is in the 'Merge' section. The primary record details for ID 2322, Beverley Banana, are shown on the left. The search form on the right is titled 'Search for secondary record:' and has 'Banana' entered in the 'Family Name' field. There are buttons for 'Refresh', 'New Search', and 'Go to Client' near the primary record details.

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

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

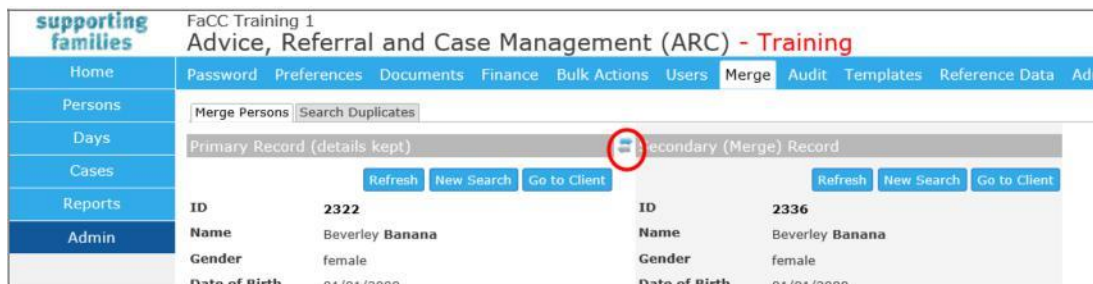
The screenshot shows the search results for secondary records. The results table is as follows:

ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Actions
2322	Beverley	Banana	F	01/01/2000	0	Open	Select
2336	Beverley	Banana	F	01/01/2000	0	Open	Select
2323	Briana	Banana	F	01/04/1981	0	Open	Select
2324	Byron	Banana	M	02/01/2005	0	Open	Select

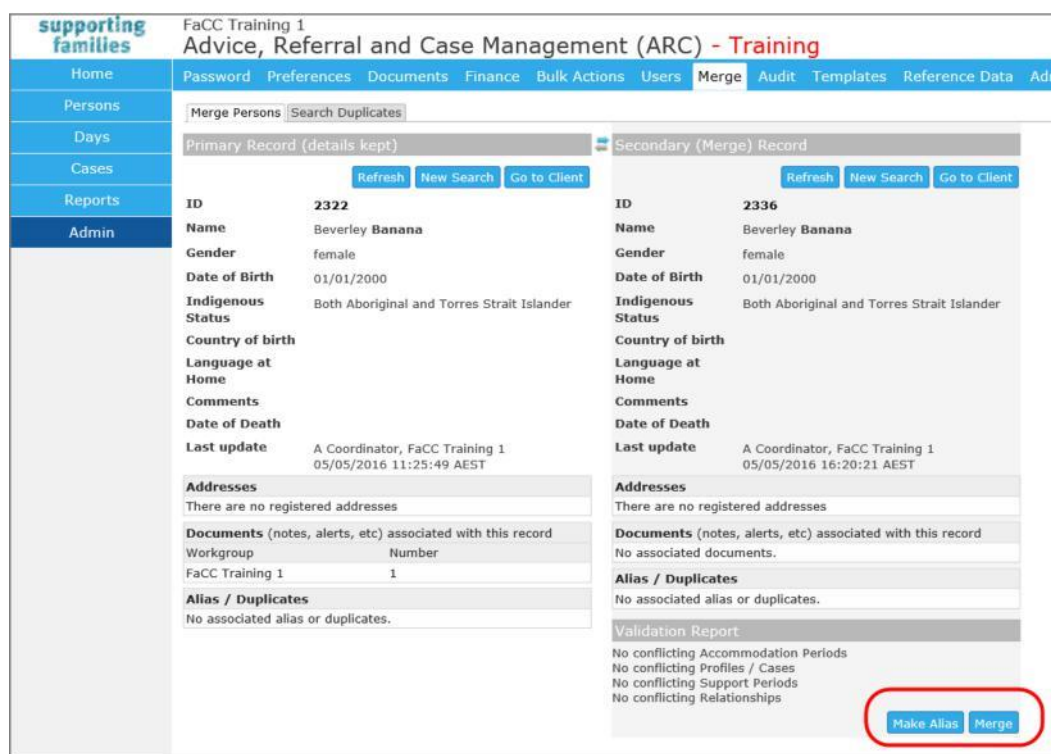
The 'Select' button for the record with ID 2336 is circled in red.

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.)



- 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.

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

Person Merge

New Search
Go to Merged Record

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

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

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

18.2.3 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.

18.2.4 Deleting an Alias Record

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

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

Home

Persons

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Merge Persons

Search Duplicates

Primary Record (details kept)

Refresh
New Search
Go to Client

ID 2322

Name Beverley Banana

Gender female

Date of Birth 01/01/2000

Indigenous Status Both Aboriginal and Torres Strait Islander

Country of birth

Language at Home

Comments

Date of Death

Last update A Coordinator, FaCC Training 1
05/05/2016 11:25:49 AEST

Addresses
There are no registered addresses

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

Workgroup	Number
FaCC Training 1	1

Alias / Duplicates

ID	Given Name	Family Name	Alias/Duplicate	Last Update
2336	Beverley	Banana	A	05/05/2016 11:25:49 AEST

Person Merge

New Search
Go to Merged Record

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

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

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.

18.3 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>

18.4 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>

18.5 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.

18.6 Audit

This is standard functionality from the Infoxchange SRS product.



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

1. See users who have accessed a specific **Person** record.

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

supporting families FaCC 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 Person Views Person Updates

Days From: 06/07/2016 To: 06/07/2016 Person ID: 2266 Worker: Please select... Go

Cases

Reports

Admin

Date	Person ID	Given Name	Family Name	Alias/Duplicate	Worker	Workgroup
06/07/2016 15:15:45 AEST	2266	Carissa	Carrot		B Coordinator	FaCC Training 1
06/07/2016 14:17:50 AEST	2266	Carissa	Carrot		B Coordinator	FaCC Training 1
06/07/2016 09:56:04 AEST	2266	Carissa	Carrot		B Coordinator	FaCC Training 1

1 to 3 of 3

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.

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**.

supporting families FaCC 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 Person Views Person Updates

Days Start Date: 01/02/2016 End Date: 06/07/2016 Person Id: Worker: B Coordinator Go

Cases

Reports

Admin

Date	Person Id	Given Name	Family Name	Alias	Action	Worker Id	Last Update By
06/07/2016 11:00:20	2268	Charles	Carrot		INSERT	103	B Coordinator, FaCC Training 1
06/07/2016 10:59:48	2267	Patricia	Parsnip		INSERT	103	B Coordinator, FaCC Training 1
06/07/2016 09:56:03	2266	Carissa	Carrot		INSERT	103	B Coordinator, FaCC Training 1

1 to 3 of 3

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.

18.7 Reference Data

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

18.8 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.

19 ARC Support

19.1 How do I...?

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

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

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

19.2 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.

19.3 Online Help

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

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

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

19.4 Practice Support

This manual provides the user with information on how to access and use the Advice, Referrals and Case Management (ARC) system for Family and Child Connect services. For matters of practice, please refer to the information available at the FaCC and IFS 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