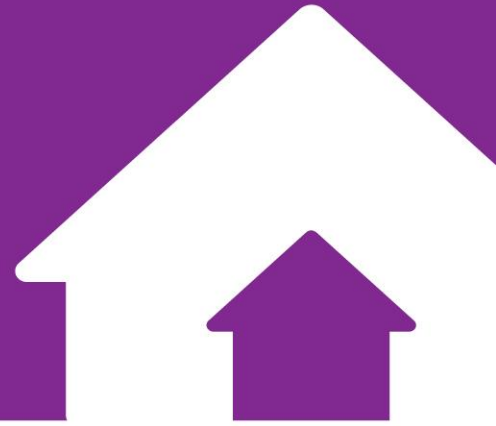


Family and Child Connect and Intensive Family Support services



Advice, Referrals and Case Management (ARC) system

Family and Child Connect (FaCC)

User Manual

July 2019

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

- <https://www.csyw.qld.gov.au/campaign/supporting-families/resources>
- <https://www.csyw.qld.gov.au/child-family/protecting-children/resources-publications>

DISCLAIMER

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

Of note, in December 2018, broader responses for recording Sex for Person details was provided.

*Sex ☐ Male ☐ Female ☐ Intersex ☐ Unknown

This update may not be reflected in all screenshots within this Manual.

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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 *.

To access ARC you will need:

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

1.1 Logging into ARC

1. Type the URL <https://srs-qld-families.infoxchangeapps.net.au> into the browser
2. Login using your unique username and password. For first time access, refer section [Logging In for the first time](#).
 - You have 4 attempts to enter the correct username and password
 - On a 5th unsuccessful attempt you will be blocked from logging in for a period of 1 hour

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

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

supporting families

Infoxchange

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 features - for IFS services and for A&TSI Family Wellbeing services
- Understanding your Reports - providing insights for managing your service and streamlining reporting requirements:
 - for FaCC and IFS services
 - for A&TSI Family Wellbeing services

For your reference:

- FaCC Program Guidelines
- IFS Program Guidelines
- A&TSI 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&TSI Family Wellbeing](#)
- [User Manual for ARC](#)
- [User Manual for A&TSI Family Participation Program](#)

If you experience any problems with ARC, please contact Infoxchange Helpline on 1300 366 516 or (03) 9410 7407 or email srs-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](#).

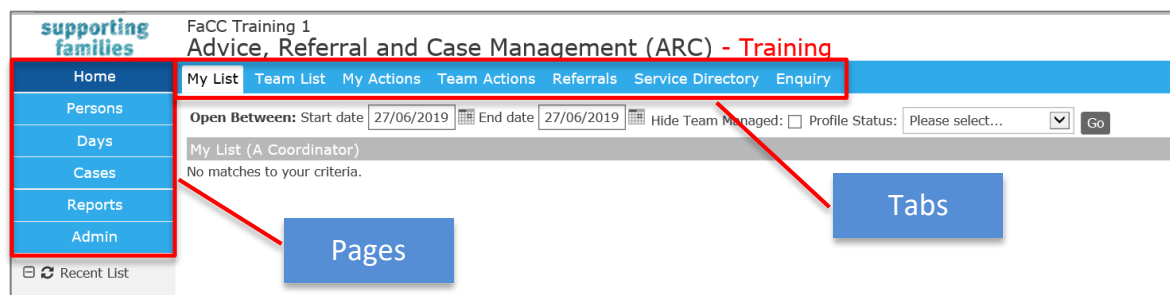
For any queries relating to practice matters, please email faeccandfwsupport@csyw.qld.gov.au or ATSIteams@csyw.qld.gov.au

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 :

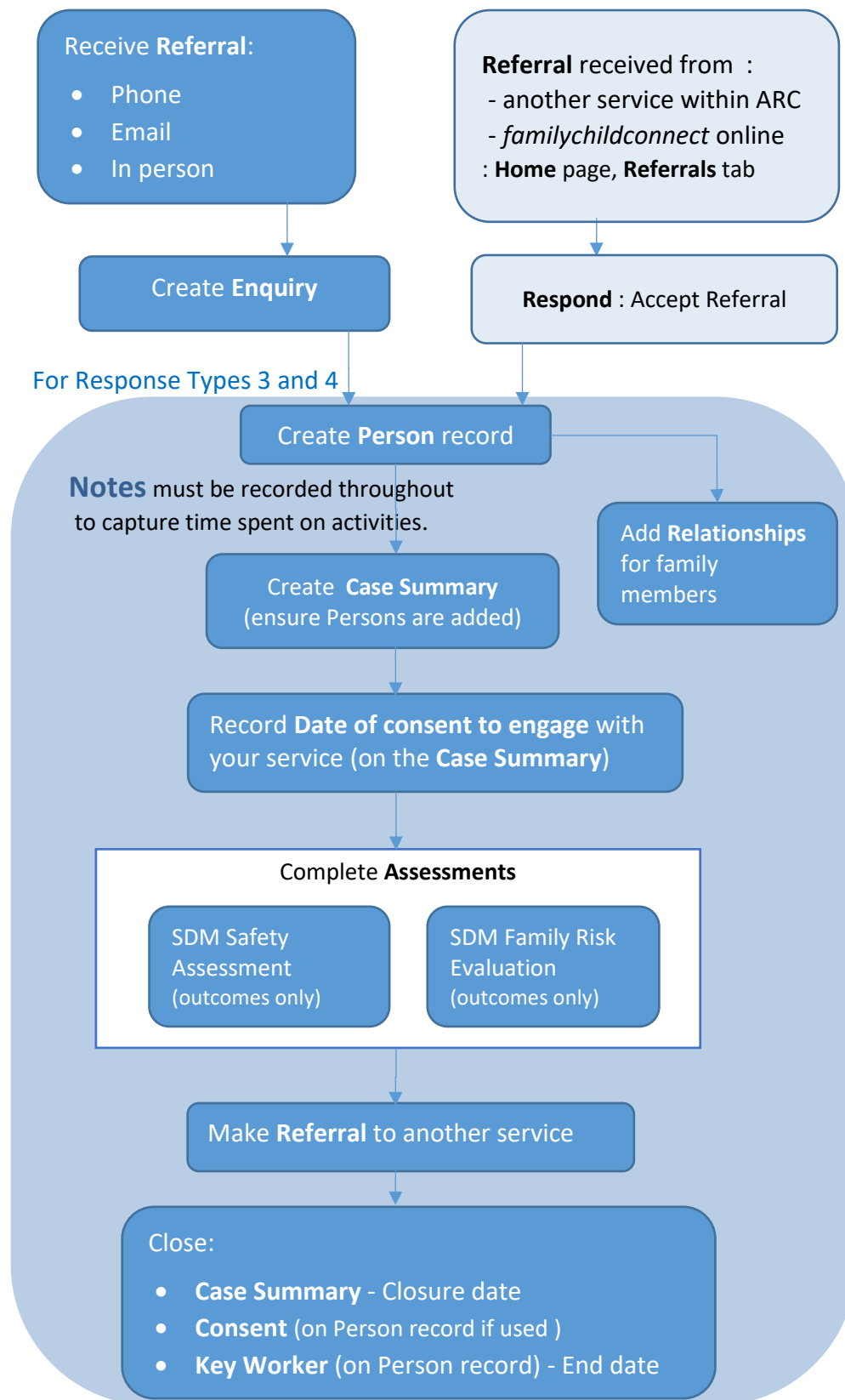
- Pages – 6 options on the left-hand side
- Tabs – appear across the top for each Page
- Workspace area – the central area.

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: [Create new alias](#)

Days Beverley Banana Primary Name

Cases Relationships: [Create new relationship](#)

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

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 contact](#)

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: [Create new alias](#)

Days Beverley Banana Primary Name

Cases Relationships: [Create new relationship](#)

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

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

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

Address: [Create new address](#)



No address exists

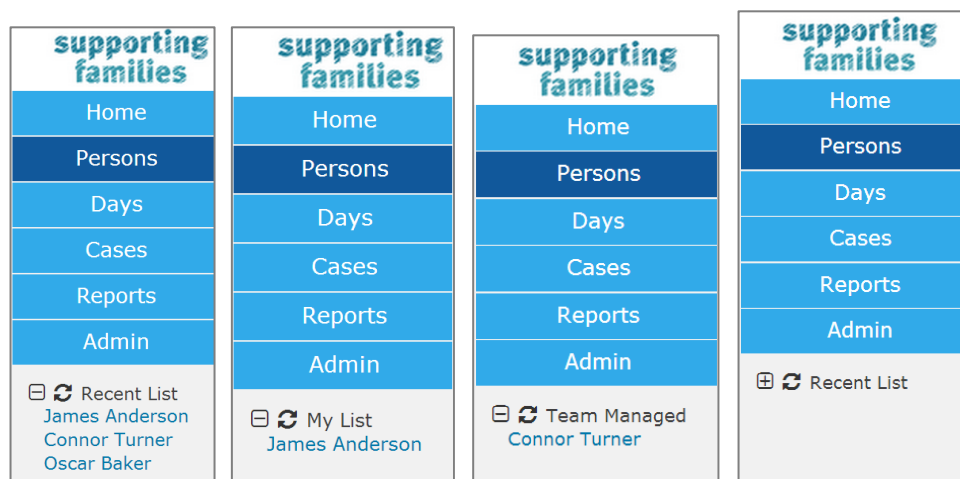
1.5 Toggle for access to Person records

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 ...

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



1.6 Logging off

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



The screenshot shows the FaCC Training 1 user interface. The top bar displays the user's name 'Beverley Banana', gender 'Female', and date of birth '01/01/2000 (Age 16 yrs)'. The user is logged in as 'A Coordinator (Coordinator)'. The left sidebar shows navigation options: Home, Persons, Days, Cases, Reports, and Admin. The main content area is divided into two sections: 'Person / Alias' and 'Case Summary'.

Person / Alias:

- Person:** Beverley Banana
- Relationships:**

Person	Relationship	DOB	Comments
Briana Banana	Mother	01/04/1981	
Byron Banana	Brother	02/01/2005	
- Profiles:** No profiles exist

Case Summary:

- Description:** Banana Family
- Person:** Beverley Banana
- Role:** (empty)
- Start Date:** 05/05/2016
- End Date:** (empty)
- Referral:** Family Strengths and Worries | Closure
- Original Referral:** * Original Referral | Disability Service

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 ie. 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 Infexchange 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 screenshot shows the ARC FaCC user interface for a user named Beverley Banana. The top right corner features a 'Change Workgroup' icon, which is circled in red. The interface includes a sidebar with navigation options like Home, Persons, Days, Cases, Reports, and Admin. The main content area displays details for the user, including their name, date of birth, and a list of relationships (Mother, Brother). There are also sections for 'Case Summary' and 'Original Referral'.

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

The 'My Workgroups' dialog box is displayed, allowing the user to select a workgroup. It contains two radio button options: 'FaCC Training 1' and 'IFS Training 1'. Below these options is a checkbox labeled 'Show this window after every login', which is circled in red. An 'OK' button is located at the bottom right of the dialog.

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:

The screenshot shows a yellow warning box with the following text: 'This record has been updated by another user while you were editing it. Updated by on 16/02/2016 09:40:31.661835 AEST Please choose one of the following action to proceed:'. There are two radio button options: 'Apply my changes anyway (the other user's changes will be overwritten)' and 'Discard my changes and redisplay (load changes made by the other user)'. A 'Continue' button is at the bottom left.

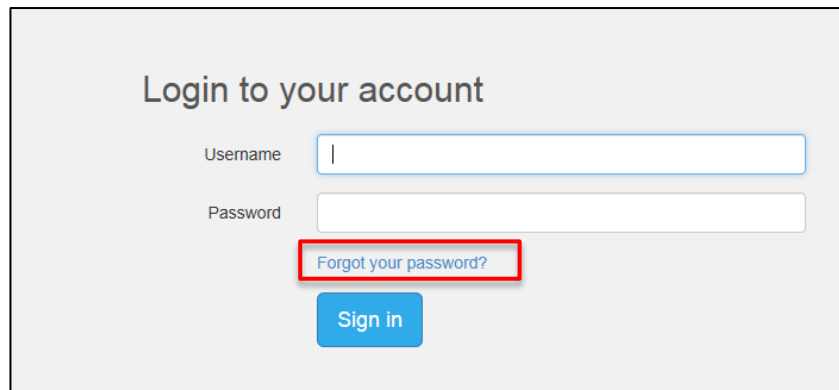
Select the required option, then click **Continue**.

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.

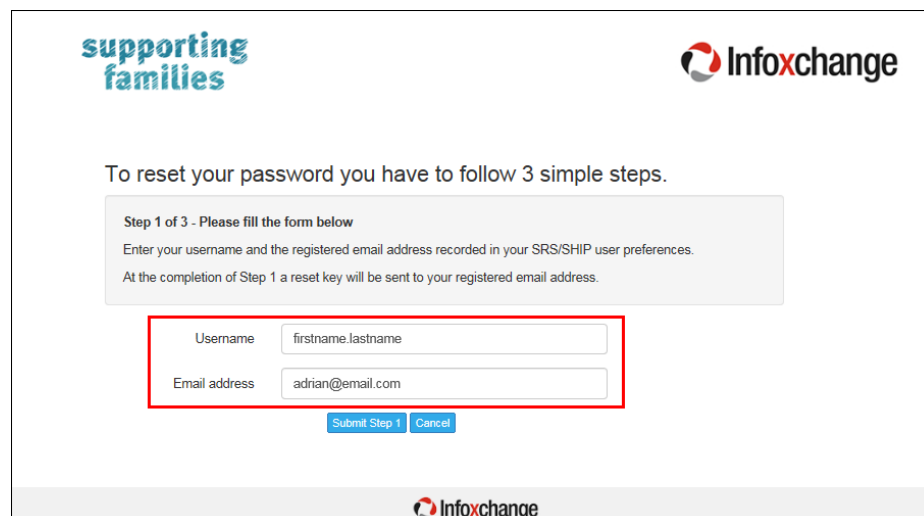
If you haven't set up your User Preferences, you will need to contact an ARC Coordinator within your service or call the Infoxchange Support Team to reset your password.

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



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

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



The screenshot shows the password reset interface. At the top are the "supporting families" and "Infoxchange" logos. Below them is the text: "To reset your password you have to follow 3 simple steps." A box labeled "Step 1 of 3 - Please fill the form below" contains the instructions: "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." Below this are two input fields: "Username" with the placeholder "firstname.lastname" and "Email address" with the placeholder "adrian@email.com". These two fields are enclosed in a red rectangular box. At the bottom of the form are two buttons: "Submit Step 1" and "Cancel". The "Infoxchange" logo is also at the bottom of the page.

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

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

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

Step 2 of 3 - Please fill the form below

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

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

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

Reset Key

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

Security Response

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

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

Note: Your password must:

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

Select **Submit Step 3**

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

Step 3 of 3 - Enter your new password

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

Passwords need to comply with the following rules:

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

New password

Confirm password

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

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

supporting families **Infoxchange**

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

Your password was changed successfully!!

[Login page](#)

2 Home Page

2.1 My List

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

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

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

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 screenshot shows the 'My Actions' tab selected in the FaCC Training 1 system. The interface includes a sidebar with navigation options: Home, Persons, Days, Cases, Reports, and Admin. The main content area displays a table of tasks. The 'My Actions' tab is selected and highlighted with a red circle. The table has columns for Due Date, Time, Action Type, Workgroup, Person, and Description. A task is listed for 05/05/2016 at 01:00 PM, assigned to Beverley Banana. A 'Go to Task' link is provided for each task. A 'Calendar View' button is also visible.

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 screenshot shows the 'Team Actions' tab selected in the FaCC Training 1 system. The interface includes a sidebar with navigation options: Home, Persons, Days, Cases, Reports, and Admin. The main content area displays a table of tasks. The 'Team Actions' tab is selected and highlighted with a red circle. The table has columns for Due Date, Time, Action Type, Worker, Person, and Description. Three tasks are listed, each with a 'Go to Task' link. A 'Calendar View' button is also visible.

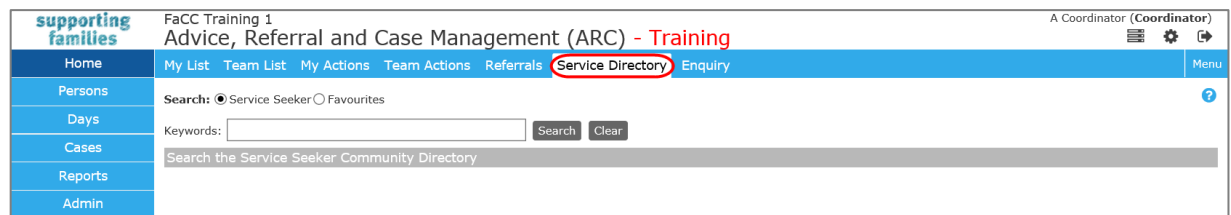
The same features for navigating and customising **My Actions** can be applied to this tab.

2.5 Service Directory

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

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

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



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 eg. 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

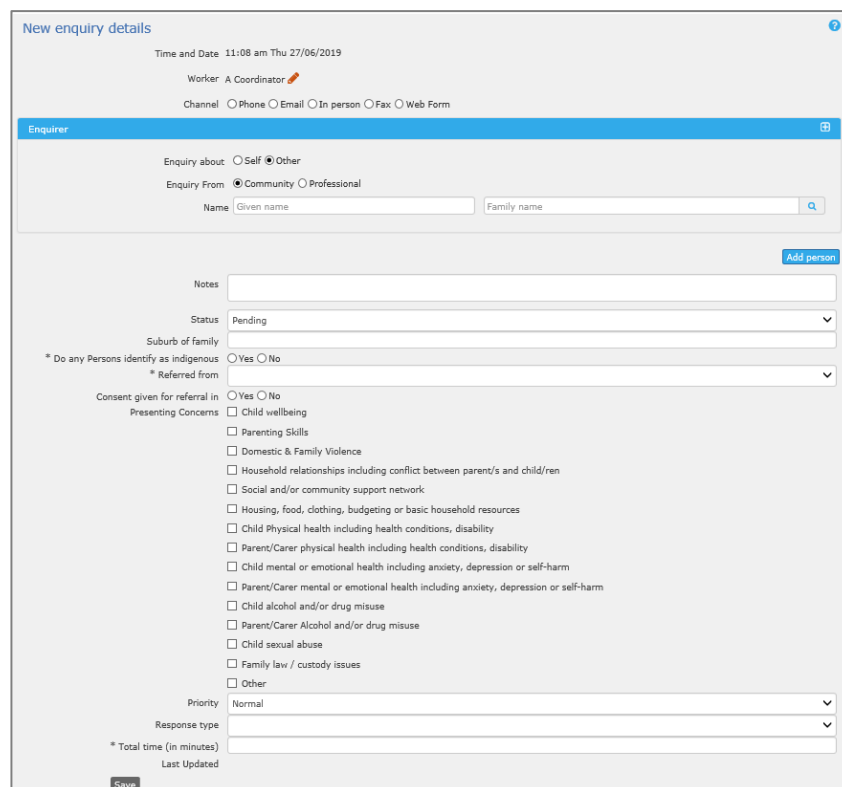
1. From the **Home** Page, select the **Enquiry** tab. A list of enquiries recorded within the last 30 days displays.



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

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

The fields marked with * are mandatory.



New enquiry details

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

Worker: A Coordinator

Channel: ☐ Phone ☐ Email ☐ In person ☐ Fax ☐ Web Form

Enquirer

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: ☐ Yes ☐ No

Presenting Concerns:

- ☐ 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

Priority: Normal

Response type:

* Total time (in minutes):

Last Updated:

Save

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

3. Record how the enquiry was received by selecting a **Channel**
4. Enter details about the **Enquirer** – the person making the enquiry eg. member of community, principal, professional, self.

Note: It is not mandatory to record a name.

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

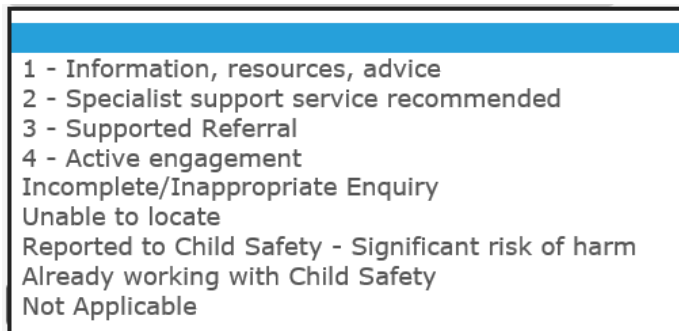
The screenshot shows the 'New enquiry details' form. It has a header with 'Time and Date' and 'Worker'. Below that are 'Channel' options (Phone, Email, In person, Fax, Web Form). The 'Enquirer' section includes 'Enquiry about' (Self, Other) and 'Enquiry From' (Community, Professional). There are input fields for 'Name' (containing 'Bruce') and 'Family name'. The 'Associated person' section has input fields for 'Name' and 'of Concern (surname)'. At the bottom right, there is a blue button labeled 'Add Person' which is circled in red.

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

The screenshot shows a dropdown menu titled '* Referred from'. The menu is divided into three sections: 'Prescribed entity', 'Specialist service providers', and 'Not a prescribed entity'. The 'Prescribed entity' section lists: 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, and Police Referral Service. The 'Specialist service providers' section lists: Aboriginal and Torres Strait Islander - Family Wellbeing (ATSI-FW), Family and Child Connect (FaCC), and Intensive Family Support (IFS). The 'Not a prescribed entity' section lists: 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, and Other - Non-Government.

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



A dropdown menu with a blue header bar. The list of options is as follows:

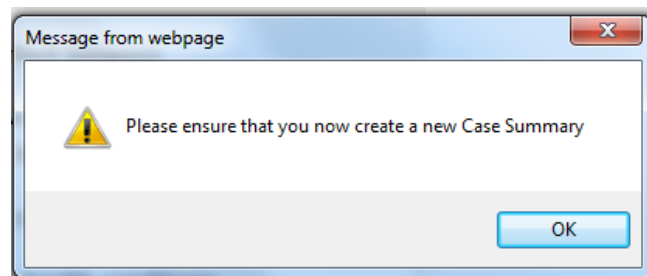
- 1 - Information, resources, advice
- 2 - Specialist support service recommended
- 3 - Supported Referral
- 4 - Active engagement
- Incomplete/Inappropriate Enquiry
- Unable to locate
- Reported to Child Safety - Significant risk of harm
- Already working with Child Safety
- Not Applicable

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

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

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


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

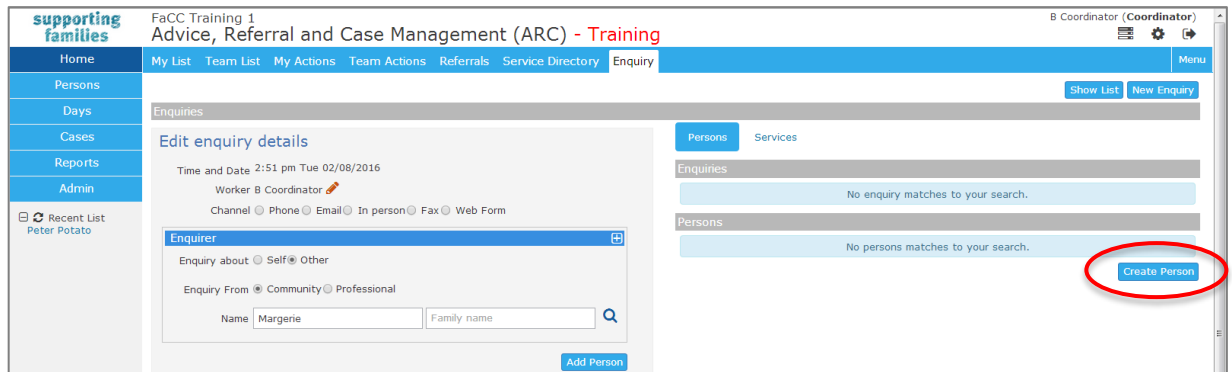


Additional Notes:

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



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

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

Persons Days Cases Reports Admin

Recent List Peter Potato

Enquiries

Show List New Enquiry

Edit enquiry details

Time and Date 2:51 pm Tue 02/08/2016

Worker B Coordinator

Channel Phone Email In person Fax Web Form

Enquirer

Enquiry about Self Other

Enquiry From Community Professional

Name Margerie Family name

Add Person

Persons Services

Enquiries


No enquiry matches to your search.

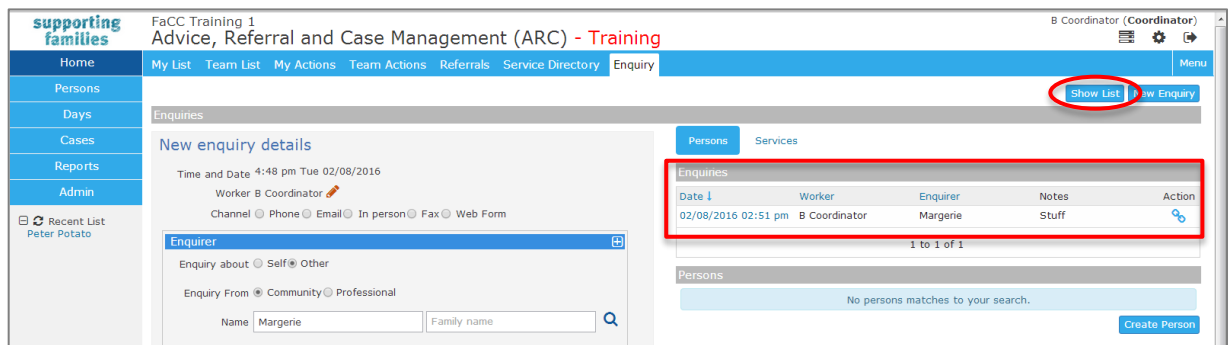
Persons

No persons matches to your search.

Create Person

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 currently possible to access Enquiry records from the Person record.



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

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

Persons Days Cases Reports Admin

Recent List Peter Potato

Enquiries

Show List New Enquiry

New enquiry details

Time and Date 4:48 pm Tue 02/08/2016

Worker B Coordinator

Channel Phone Email In person Fax Web Form

Enquirer


Enquiry about Self Other

Enquiry From Community Professional

Name Margerie Family name

Persons Services

Enquiries

Date	Worker	Enquirer	Notes	Action
02/08/2016 02:51 pm	B Coordinator	Margerie	Stuff	

1 to 1 of 1

Persons

No persons matches to your search.

Create Person

3.4 Using the Enquiry List

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



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

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

Persons Days Cases Reports Admin

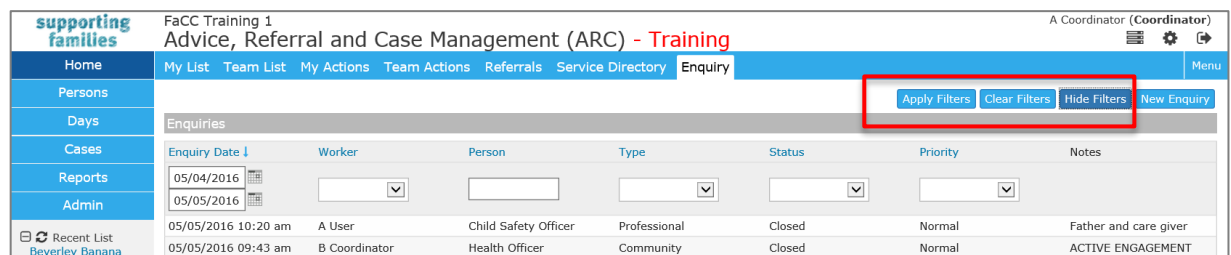
Recent List Beverley Banana Peter Potato

Enquiries

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

1 to 6 of 6

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



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

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

Persons Days Cases Reports Admin

Recent List Beverley Banana

Enquiries

Enquiry Date ↓	Worker	Person	Type	Status	Priority	Notes
05/04/2016	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
05/05/2016	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
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.

The screenshot shows the 'FaCC Training 1' web application. The header includes the 'supporting families' logo, the title 'FaCC Training 1 Advice, Referral and Case Management (ARC) - Training', and a user profile 'A Coordinator (Coordinator)'. A left-hand navigation menu contains links for Home, Persons, Days, Cases, Reports, Admin, and a Recent List. The main content area is titled 'Search' and features a 'Search By:' section with radio buttons for Name (selected), Identifier, Address, Phone, and DOB. Below this are input fields for 'Given name' and 'Family name', along with gender options (Male, Female, Intersex, Unknown) and a 'Fuzzy' checkbox. 'Search' and 'Clear' buttons are present. At the bottom left, a 'Family name search' box with a 'GO' button is highlighted with a red oval.

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**.

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

Home Search Persons Days Cases Reports Admin

Search By: ☒ Name ☐ Identifier ☐ Address ☐ Phone ☐ DOB

Given name Family name ☐ Male ☐ Female ☐ Intersex ☐ Unknown ☒ Fuzzy

Search 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.

If there is no record found, 'No matches to your search' message will be displayed.

2. Click **Add new Person** to create a record.
3. The **Add New Person** form is displayed. Complete as much information as possible. Sex and Indigenous status are mandatory fields (*). If the exact date of birth is unknown, select a year only and tick the **year estimated** checkbox.

Add New Person

Given Name

Middle Name

Family Name

*Sex ☐ Male ☒ Female ☐ Intersex ☐ Unknown

Date of Birth

☐ year estimated

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

Identifies as ☐ Australian South Sea Islander

Country of birth

Preferred Language

☐ Culturally and Linguistically Diverse

Comments

Primary diagnosed disability

Secondary diagnosed disability

Person Identifier

ICMS ID


Date of Death

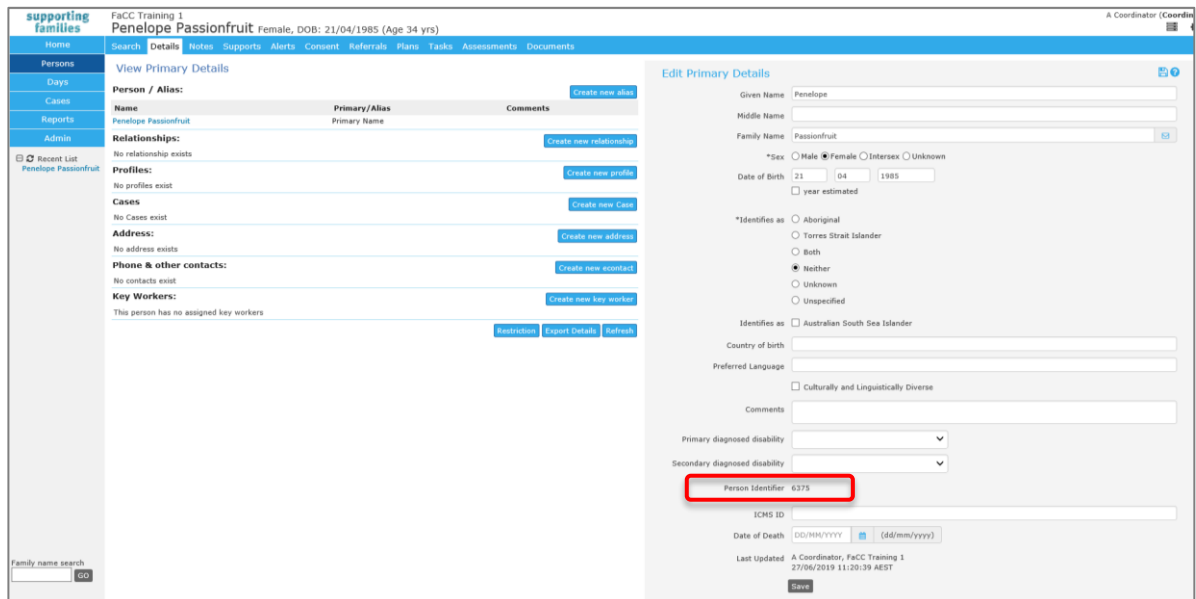
Last Updated

For recording *Indigenous status*,

Unknown – the person does not know their Indigenous status

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

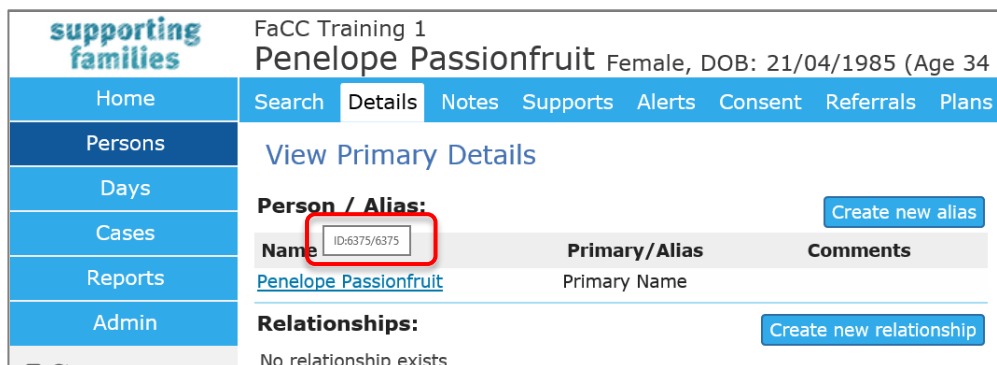
4. Select the **Save** button or select the  icon in the top right of the form.
5. The **Person** record is created – the **Details** tab is the default view.



The screenshot shows the 'Edit Primary Details' form for a person named Penelope Passionfruit. The form is divided into two main sections: 'Person / Alias' and 'Edit Primary Details'. The 'Person / Alias' section includes a table with columns for Name, Primary/Alias, and Comments. The 'Edit Primary Details' section includes fields for Given Name, Middle Name, Family Name, Sex, Date of Birth, Country of birth, Preferred Language, Comments, Primary diagnosed disability, Secondary diagnosed disability, and Person Identifier. The 'Person Identifier' field is highlighted with a red box, showing the value 6375.

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 'Details' tab for a person named Penelope Passionfruit. The 'Person / Alias' section is highlighted, showing a table with columns for Name, Primary/Alias, and Comments. The 'Name' field is highlighted with a red box, showing the value ID:6375/6375.

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' FaCC Training 1 interface. The user is logged in as 'Carissa Carrot', Female, DOB: 14/04/2006 (Age 10 yrs). The 'Details' tab is selected. The left sidebar shows a 'Recent List' with 'Carissa Carrot', 'Beverley Banana', and 'Peter Potato'. The main content area has sections for 'Person / Alias:', 'Relationships:', 'Profiles:', 'Cases:', 'Address:', 'Phone & other contacts:', and 'Key Workers:'. Each section has a 'Create new' button. The 'Create new alias' button is highlighted with a red circle. On the right, the 'Add New Alias' form is visible, with fields for 'Given Name', 'Middle Name', 'Family Name', 'Sex' (Male/Female), 'Comments', and 'Last Updated'. A 'Save' button is at the bottom of the form.

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

The screenshot shows the 'supporting families' FaCC Training 1 interface. The user is logged in as 'Carissa Carrot', Female, DOB: 14/04/2006 (Age 10 yrs). The 'Details' tab is selected. The left sidebar shows a 'Recent List' with 'Carissa Carrot', 'Beverley Banana', and 'Peter Potato'. The main content area has sections for 'Person / Alias:', 'Relationships:', 'Profiles:', 'Cases:', 'Address:', 'Phone & other contacts:', and 'Key Workers:'. Each section has a 'Create new' button. The 'Create new alias' button is highlighted with a red circle. On the right, the 'Edit Alias Details' form is visible, with fields for 'Given Name', 'Middle Name', 'Family Name', 'Sex' (Male/Female), 'Comments', and 'Last Updated'. The 'Given Name' field is filled with 'Princess'. A 'Save' button is at the bottom of the form.

4.4 Create Relationships

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

The screenshot shows the 'supporting families' FaCC Training 1 interface. The user is viewing the 'Details' tab for 'Carissa Carrot' (Female, DOB: 14/04/2006, Age 10 yrs). The left sidebar contains navigation links: Home, Search, Details (selected), Notes, Supports, Alerts, Consent, Referrals, Plans, Tasks, Assessments, Documents, Persons, Days, Cases, Reports, and Admin. The main content area is divided into sections: 'Person / Alias' (with 'Create new alias' button), 'Relationships' (with 'Create new relationship' button highlighted by a red circle), 'Profiles' (with 'Create new profile' button), 'Cases' (with 'Create new Case' button), 'Address' (with 'Create new address' button), 'Phone & other contacts' (with 'Create new econtact' button), and 'Key Workers' (with 'Create new key worker' button). A right sidebar contains a 'Search for related person' form with fields for 'Given name', 'Family name', 'Sex' (Male/Female), and a 'Fuzzy' checkbox. Below the form are 'Go' and 'Clear' buttons. At the bottom of the right sidebar is a 'Results' section.

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

The screenshot shows the 'supporting families' FaCC Training 1 interface. The user is viewing the 'Details' tab for 'Carissa Carrot' (Female, DOB: 14/04/2006, Age 10 yrs). The left sidebar is the same as in the previous screenshot. The main content area is the same. The right sidebar's 'Search for related person' form is now filled with 'Charles' in the 'Given name' field and 'Carrot' in the 'Family name' field. The 'Sex' is set to 'Male' and 'Fuzzy' is checked. The 'Go' button is highlighted. Below the form, the 'Results' section shows 'No matches to your search.' and a tip: 'Tip: If you are not sure about the spelling try using the % symbol as a wildcard. For example, johns% would return both johnstone and johnson.' The 'Add new person' button is highlighted with a red circle.

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

The screenshot shows the 'supporting families' FaCC Training 1 interface. The user is viewing the 'Details' tab for 'Carissa Carrot' (Female, DOB: 14/04/2006, Age 10 yrs). The left sidebar is the same as in the previous screenshots. The main content area is the same. The right sidebar's 'Edit Relationship' form is displayed. It has a 'Related person' dropdown set to 'Charles Carrot'. Below it is a checkbox 'Is Carissa Carrot's' with a dropdown arrow. The 'Start Date' is set to '05/05/2016' and the 'End Date' is empty. There is a 'Comments' text area. At the bottom of the form are 'Print View' and 'Save' buttons. The 'Save' button is highlighted.

5. 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).

6. 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.

supporting families

FaCC Training 1

Charles Carrot Male, DOB: 01/01/1981 (Age 35 yrs)

Home

Search

Details

Notes

Supports

Alerts

Consent

Referrals

Plans

Tasks

Assessments

Documents

Persons

Days

Cases

Reports

Admin

Recent List

Charles Carrot

Carissa Carrot

Beverley Banana

Peter Potato

Person / Alias:

Charles Carrot

Primary Name

Create new alias

Relationships:

Create new relationship

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

Profiles

No profiles exist

Create new profile

Cases

No Cases exist

Create new Case

Address:

No address exists

Create new address

Phone & other contacts:

No contacts exist

Create new econtact

Key Workers:

This person has no assigned key workers

Create new key worker

Create new profile

Profile type

Child Profile

Report to Child Safety

Export Details

Refresh

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 'New Address Details' form for Carissa Carrot. The form includes fields for Street, Suburb, State, Postcode, Country, and Comments. It also has checkboxes 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 is highlighted with a red circle.

2. Record the address, including **Street**, **Suburb** and **Postcode**.
3. Select the **Address type**.
4. Update the **Primary** and **Current** address status (Yes/No) as relevant for that Address type.
5. The address can be recorded, where relevant, to related persons by ticking the checkbox, in the **Others who live at this address** box.
6. Select **Save**. The Primary address is indicated by the **green** tick.
7. To edit the address, select the address blue text - the Edit Address Details form will open.
To view address in Google maps, select the icon.

The screenshot shows the 'Edit Address Details' form for Carissa Carrot. The form includes fields for Street, Suburb, State, Postcode, Country, and Comments. It also has checkboxes 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 '12 First Avenue' text is highlighted with a red circle, and the location pin icon is also highlighted with a red circle.

Additional Notes:

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

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

New Address Details:

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

Street

Suburb

State

Postcode

Country

Comments

Address type

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 / 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, fax and mobile. Other contacts such as an emergency contact or workers at external agencies can also be associated with the person record.

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

The screenshot shows the 'Edit Contact Details' form for Carissa Carrot. The form is divided into several sections:

- Name / Alias:** Includes fields for Name (Carissa Carrot), Primary/Alias (Princess), and Comments.
- Relationships:** Includes a table with columns for Person, Relationship, and DOB. A 'Create new relationship' button is present.
- Profiles:** Includes a 'Create new profile' button.
- Cases:** Includes a 'Create new Case' button.
- Address:** Includes a 'Create new address' button and a table with columns for Street, Locality, Type, Comments, and Last Update.
- Phone & other contacts:** Includes a 'Create new econtact' button, which is highlighted with a red circle.
- Key Workers:** Includes a 'Create new key worker' button.

 The right side of the form contains the 'Edit Contact Details' form with fields for *Contact, *Contact type, Safety Issues, Comments, Start Date, End Date, Current econtact?, and Last update. A 'Save' button is at the bottom right.

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 organization details.
3. Add **Role** and **Comments** as required.
4. In **May be viewed by**, select Workgroup.
(In the current configuration of ARC, Workgroup and Cluster are one and the same.)
5. 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 displays the 'supporting families' interface. The main content area shows details for 'FaCC Training 1 Penelope Passionfruit'. The 'Edit Key Worker' form is open on the right, showing fields for Name (Dr Karl), Workgroup (Central Plaza Medical C), Role (Family GP), and Comments (4567 8900). The form also includes a 'May be viewed by' section with radio buttons for Workgroup (selected) and Cluster, and a 'Current Key Worker?' section with a radio button for Yes (selected) and No. The 'Last update' is shown as 'A Coordinator 27/06/2019 12:29:56 AEST'. The 'Save' and 'Delete' buttons are at the bottom of the form.

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

- (a) Select **No** for **Current Key Worker?**
- (b) Click **Save**. The End Date auto-populates to today's date upon Save.



TIP

Key worker (allocated on 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

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

The screenshot shows the 'supporting families' FaCC Training 1 interface. The 'Details' tab is selected for Carissa Carrot (Female, DOB: 14/04/2006, Age 10 yrs). The 'Create new Case' button is circled in red. The 'Case type' dropdown is also circled in red, showing 'Case Summary' selected. The 'Create' button is visible below the dropdown.

5.2 Create Case / Case Summary from the Cases page

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

The screenshot shows the 'supporting families' FaCC Training 1 interface. The 'Cases' page is selected. The 'Create New Case Summary' button is circled in red. The 'Case Summary' form is visible on the right side of the screen, showing fields for Description, Original Referral, and This Referral.

5.3 Complete Case Summary details

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

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

The mandatory fields are marked with an asterisk * .

The screenshot shows the 'Case Summary' form with three tabs: 'Referral', 'Presenting Concerns', and 'Closure'. The 'Referral' tab is active. Red boxes highlight the following mandatory fields:

- * Description
- * Original Referral Source
- * Referral Date (for this service)
- * Case Creation date
- * Is the referrer a prescribed entity
- * Referral Source
- * Date of consent to engage with the service
- * Case Worker

The form includes sections for 'Original Referral', 'This Referral', 'Other Referral Details', and 'Service Response'. It also features a 'Documents' section with a warning to save before attaching and a 'Last update' section with a 'Save' button.

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

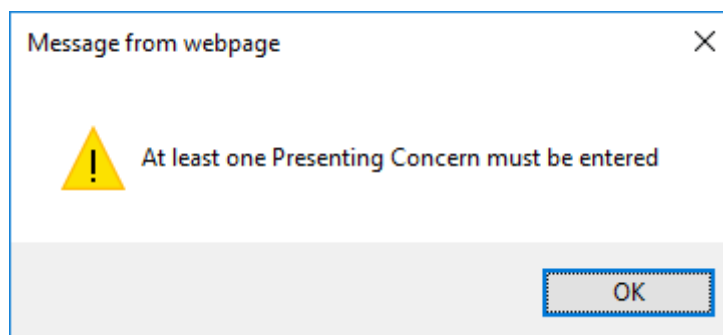
Note: If the **Referral Source*** is either **Child Safety – Regional Intake Service(RIS)** or **Child Safety Service Centre (CSSC)**, then extra mandatory fields will display to record the specific Child Safety office and the Type of referral :

* Referral Source: Child Safety Service Centre (CSSC)

* Child Safety Service Centre: Gympie CSSC

* Type of referral from Child Safety: Please select...
 Please select...
 Child Concern Report
 I&A - Substantiated - CNINOP
 I&A - Unsubstantiated - CNINOP
 Intervention with Parental Agreement (case closure)
 Other

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



Referral Presenting Concerns Closure

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

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 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

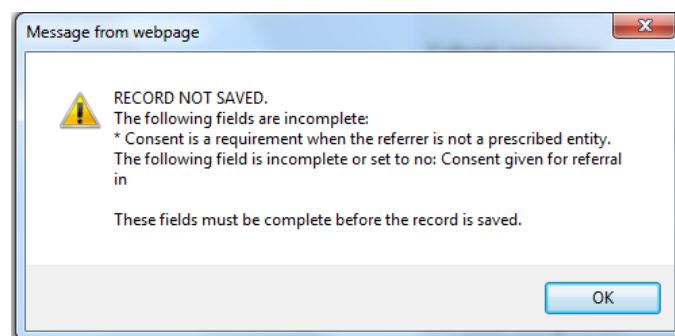
Postcode 4870


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

Case Summary

* Description Passionfruit

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

Referral Presenting Concerns Closure

A red circle highlights a plus icon (+) in the top right corner of the table, indicating where to click to add a new person.

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

The first screenshot shows the 'Case Summary' form with the 'Person Search and Select' pop-up. The 'Search' radio button is selected, and the 'GO' button is visible. The second screenshot shows the 'Related' radio button selected, and checkboxes for 'Patsy Passionfruit' and 'Paul Passionfruit' are checked.

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**.

The first screenshot shows the 'Case Summary' form with the 'Person' section populated with three entries: Patsy Passionfruit, Paul Passionfruit, and Penelope Passionfruit, all with a start date of 27/06/2019. The second screenshot shows the 'Edit association details' pop-up for Patsy Passionfruit, with a dropdown menu for 'Role' showing options: Please select..., Carer/parent, Referred Child, and Primary Carer.

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 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

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

Service Response

Case Worker: Please select...

Previous Client: ☐ Yes ☐ No

Date of consent to engage with the service:

Documents: [Select & Upload](#)

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

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.

An example of the completed **Referral** sub-tab for the **Case Summary** is shown below.

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

* 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

Service Response

Case Worker
K User

Previous Family
☐ Yes ☐ No

Date of consent to engage with the service
27/06/2019

Documents
Select & Upload

File Name	Uploaded	
Family consent.docx	27/06/2019 12:57:44 AEST	

Last update
A Coordinator, FaCC Training 1
27/06/2019 12:57:44 AEST

Save
Print View

The **Presenting Concerns** sub-tab recognises the concern issues for the family. It replaced the *Family Strength and Worries* sub-tab in March 2017 for all new Case Summary records. Case Summary records created prior to this time will retain the *Family Strengths and Worries* subtab.

Referral | **Presenting Concerns** | Closure

☒ Child wellbeing

☒ Parenting Skills

☐ Domestic & Family Violence

☒ Household relationships including conflict between parent/s and child/ren

☒ Social and/or community support network

☐ Housing, food, clothing, budgeting or basic household resources

☒ Child Physical health including health conditions, disability

☐ Parent/Carer physical health including health conditions, disability

☐ Child mental or emotional health including anxiety, depression or self-harm

☐ Parent/Carer mental or emotional health including anxiety, depression or self-harm

☐ Child alcohol and/or drug misuse

☒ Parent/Carer Alcohol and/or drug misuse

☐ Child sexual abuse

☐ Family law / custody issues

☐ Other

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Save

Print View

Case Summary

* Description Carrot Family

Person	Role	Start Date	End Date	
Charles Carrot	Carer/parent	27/07/2016		
Patricia Parsnip	Carer/parent	27/07/2016		
Carissa Carrot	Referred Child	27/07/2016		

Referral | **Family Strengths and Worries** | Closure

Referral

Child/ren development and wellbeing

Please select

Details (from Referral)

Parenting skills

Referral

Please select

5.4 Close a Case / Case Summary

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

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

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

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

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:

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

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02/03/2017 16:36:00

3. Use the **Exit Referrals/Links with other agencies** text box to record any relevant details.
4. Enter a **Closure Date***
This updates the **End Date** for each Person in the Case Summary.
This **End Date** displays against the **Case Summary** on their **Persons** page, **Details** tab.

NOTE : If the Closure Date is changed after the initial Save, you will need to manually change the End Date (in the Person display at the top of the form) by clicking the red crayon.

5. Complete the **Reason for case summary closure*** from the list of values available (can only select one) under the categories of **Referral to another service** and **Early Exit**.

Closure date	Please select...
Reason for case summary closure	<p>Referral to another service</p> <ul style="list-style-type: none"> 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 Referred - Medical - GP Referred - Medical - Paediatrician/Specialist Referred - Mental Health Service Referred - Parenting programs Referred - Youth service Referred - Other service <p>Early Exit</p> <ul style="list-style-type: none"> Family's needs met by FaCC Intervention Inappropriate referral Data entry error Duplicate referral Unable to contact or locate family Moved out of area Outside catchment area Refused support/did not consent Secondary Support Service Response Not Required Reported to Child Safety - CSSC Reported to Child Safety - RIS Staffing or agency reason Terminated service/disengaged Other reason Already engaged - ATSI Family Wellbeing Already engaged - ATSI Family Support Already engaged - Child Safety Already engaged - DFV Service Already engaged - Disability Service Already engaged - Drug and Alcohol Service Already engaged - Family and Child Connect Already engaged - Health - CYMHS Already engaged - Health Visiting Program Already engaged - Intensive Family Support Already engaged - Mental Health Service Already engaged - Other service

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

Case Summary

* Description

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

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

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02/03/2017 16:36:00

7. Select **Save**.

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

Message from webpage

RECORD NOT SAVED.
The following fields are incomplete:
* Reason for case summary closure

These fields must be complete before the record is saved.

Message from webpage

Closure date must not be before Case Creation date

Message from webpage

RECORD NOT SAVED.
The following fields are incomplete:
* Date of consent to engage with the service cannot be blank when the Reason for case summary closure is Referral to another service, or Early Exit reason of Terminated Service/Disengaged

These fields must be complete before the record is saved.

Message from webpage

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

These fields must be complete before the record is saved.

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.

supporting families

FaCC Training 1

Advice, Referral and Case Management (ARC) - Training

Home

Persons

Days

Cases

Reports

Admin

Recent List

Carissa Carrot

Patricia Parsnip

Beverley Banana

Charles Carrot

Peter Potato

Case Summary

Records 20



Show Filters

Create New Case Summary

Case List

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

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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.

supporting families

Home

Persons

Days

Cases

Reports

Admin

Recent List

Carissa Carrot

Patricia Parsnip

Beverley Banana

Charles Carrot

Peter Potato

FaCC Training 1

Advice, Referral and Case Management (ARC) - Training

Case Summary

Records 20

Show Filters

Create New Case Summary

Case List

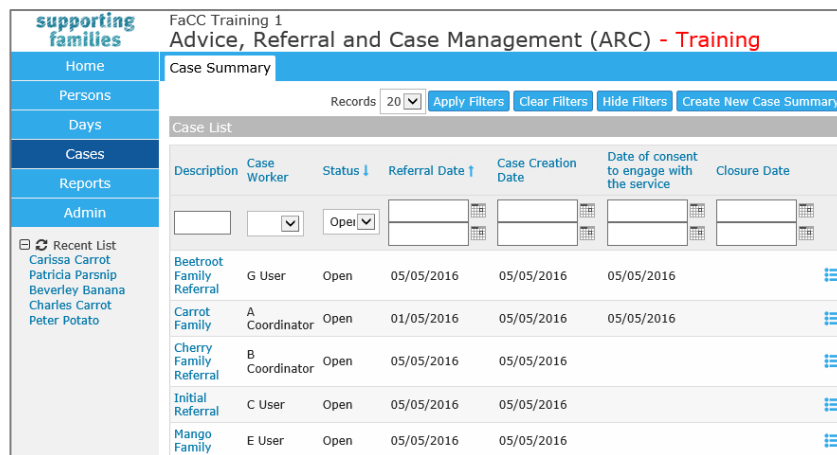
Description	Case Worker	Status	Referral Date ↑	Case Creation Date	Date of consent to engage with the service	Closure Date
Beetroot Family Referral	G User	Open	05/05/2016	05/05/2016	05/05/2016	
Carrot Family	A Coordinator	Open	01/05/2016	05/05/2016	05/05/2016	
Cherry Family Referral	B Coordinator	Open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

1 to 10 of 10

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**.



The screenshot shows the FaCC Training 1 interface for Advice, Referral and Case Management (ARC) - Training. The left sidebar contains navigation links: Home, Persons, Days, Cases, Reports, and Admin. The main content area is titled 'Case Summary' and includes a 'Records' dropdown set to 20, and buttons for 'Apply Filters', 'Clear Filters', 'Hide Filters', and 'Create New Case Summary'. Below this is 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. The table displays five rows of data, each with a corresponding 'Recent List' on the left sidebar.

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		

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

Hide Filters – returns you to the List view

c) Create new Case Summary

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

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


The screenshot shows the 'supporting families' interface for 'FaCC Training 1 Advice, Referral and Case Management (ARC) - Training'. On the left is a navigation menu with 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The 'Cases' section is active, showing 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. Two rows are visible: 'Books Family' (A Coordinator, Open, 02/03/2017, 02/03/2017) and 'Carrot Family' (K User, Open, 28/02/2017, 02/03/2017, 10/03/2017). A 'Create New Case Summary' button is highlighted in a red circle. On the right, the 'Case Summary' form is partially visible, showing fields for Description, Original Referral Source, and This Referral details.

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



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

The screenshot shows the 'Case Summary' form. The 'Description' field is filled with 'Cucumber Family'. Below it is a table with columns: Person, Role, Start Date, and End Date. A red circle highlights a blue '+' icon in the top right corner of this table, indicating where to click to add a new person record. The form also includes sections for 'Original Referral' (with a dropdown for 'Police') and 'This Referral' (with fields for 'Referral Date (for this service)' set to 21/02/2017, 'Case Creation date' set to 28/02/2017, a radio button for 'Is the referrer a prescribed entity' set to 'Yes', and a dropdown for 'Referral Source' set to 'Corrective Services').

The **Person** section will appear (after the Case Summary is saved) and the  icon must be used to attach the relevant Person records.

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

The screenshot shows a 'Service Response' dropdown menu. The 'Case Worker' field is set to 'Please select...'. The 'Previous Client' field is also set to 'Please select...'. Below these, a list of options is visible: 'A Coordinator' and 'A User'.

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.

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

Home Persons Days Cases Reports Admin

Case Summary

Records 20 Show Filters Create New Case Summary

Case List


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

1 to 10 of 10

Associated Records Filter Create New

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

1 to 7 of 7

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

Associated Records Filter Create New

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

1 to 7 of 7

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

Associated Records			
Filter Create New			
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.

Associated Records			
Filter Create New			
From:		Record:	Please select... ▼
To:		Go	Clear
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

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

Associated Records			
Filter Create New			
Date	Record	Type	
02/03/2017	Note		
1 to 1 of 1			
Referrals and Plans do not display in this table. You must view / action these from the Persons page.			

Note
 Support
 Alert
 Task
Assessment
 SDM Safety Assessment
 SDM Family Risk Evaluation
 Document

Referrals and Plans do not display in this table. You must view / action these from the Persons page.

Important 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.

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 :

1.



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

This field is used for reporting purposes for your service.

Service Response

Case Worker ▼

Previous Family ☐ Yes ☐ No

Date of consent to engage with the service 📅

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

supporting families FaCC Training 1
Penelope Passionfruit Female, DOB: 21/04/1985 (Age 34 yrs)

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

Persons **Consents** File Create New Consent

No Consents to display

Edit Consent Details

* Worker/s A A Coordinator, FaCC Training !

Start date 📅

Review date 📅

End Date 📅

Consent to engage ☒ Yes ☐ No with the service

Notes

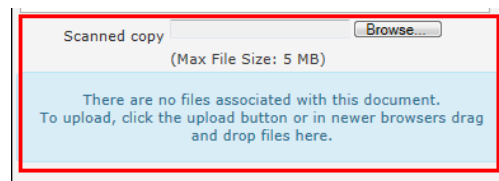
This consent is also associated with (tick):

Name ↑	Relationship	Associate record with:
Patsy Passionfruit	Daughter	<input checked="" type="checkbox"/>
Paul Passionfruit	Husband	<input checked="" type="checkbox"/>

May be viewed by ☒ Workgroup ☐ Cluster

Last update Save

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.



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 displays the ARC FaCC user interface. On the left, a sidebar contains navigation links: Home, Persons, Days, Cases, Reports, and Admin. The main area shows the 'Notes' tab for 'FaCC Training 1, Carissa Carrot'. A table lists existing notes with columns for Activity Date, Worker / Type, and Notes. A red circle highlights the 'Create New Note' button in the top right of the notes section. To the right, the 'Edit Note Details' panel is visible, containing fields for Activity Date, Worker/s, Activity Type, Case Summary, and a list of services provided (Child, Health, General Support, Domestic and Family Violence, Financial/Employment, FaCC Services, and Other). It also includes checkboxes for reporting to Child Safety and consultation with PCPP, and a section for associating the note with family members.

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.)

The image shows two side-by-side screenshots of the 'Additional workers' form. Both forms have a title bar that says '* Worker/s A User FaCC Training 1 X'. The left form has a 'Workgroup' dropdown set to 'FaCC Training 1', a 'Worker' dropdown set to 'Please select...', and an empty 'Role' field. The right form has a 'Workgroup' dropdown set to 'External Organisation...', an 'Organisation' text field with 'ABC Family Matters', a 'Worker' text field with 'Michael Melon', and a 'Role' text field with 'Specialist'. Both forms have 'Add' and 'Close' buttons at the bottom.

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

The image shows a list of activity types categorized into three sections: **Centre based**, **External**, and **Other**. The **Centre based** section includes Accommodation support, Appointment, Client meeting, Drop In, Group Work, and Informal interaction. The **External** section includes Phone, Home visit, Meeting, In-home Support, and Transport. The **Other** section includes Case coordination, Correspondence, and File Note.

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

The image shows a form section titled 'Reported to' with two checkboxes: 'Child Safety (RIS)' and 'Child Safety (CSSC)'. Both checkboxes are currently unchecked.

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

The image shows a form section titled 'Consultation with' with several checkboxes: 'PCPP', 'DFV Consultation', 'Cultural Consultation', 'Disability Support', 'Practice Consultation', and 'Other'. All checkboxes are currently unchecked.

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/un-editable 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	Contact	Case Work	Travel	
	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>	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.

Note Details

Activity Date 21/02/2017

Worker/s Worker Two, FaCC - UAT Service

Work group FaCC - UAT Service

Activity Type Client meeting

Case Summary Carrot Business

Notes
Discussed some things

Also associated with: Carmine Carrot, Mother

Activity Length
Contact 23 Case Work Travel mins

Edit locked 24/02/2017

Last update Worker Two, FaCC - UAT Service
21/02/2017 15:50:55 AEST

[Print View](#)

Note Details

Activity Date 21/02/2017

Worker/s Worker Two, FaCC - UAT Service

Work group FaCC - UAT Service

Activity Type Client meeting

Case Summary Carrot Business

Notes
Discussed some things

Also associated with: Carmine Carrot, Mother

Activity Length
Contact 23 Case Work Travel mins

Edit locked 24/02/2017

Unlock for Days

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

Last update

[Print View](#)

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

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

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

**TIP**

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

SearchDetailsNotesSupportsAlertsConsentReferralsPlansTasksAssessment

Notes

FilterCreate New Note

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

Export Notes

1 to 7 of 7

8 Assessments

8.1 Record Assessments

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

The Assessments available are:

- SDM Safety Assessment (outcomes only)
- SDM Family Risk Evaluation (outcomes only)

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.



The screenshot shows the 'supporting families' FaCC Training 1 interface. The user is logged in as 'Carissa Carrot', Female, DOB: 14/04/2006 (Age 10 yrs). The 'Assessments' tab is selected in the top navigation bar. The left sidebar shows the 'Persons' page with a list of recent entries: Carissa Carrot, Patricia Parsnip, Beverley Banana, Charles Carrot, and Peter Potato. The main content area shows 'No Reviews to display' under the 'Reviews' section. A 'Create New Review' button is visible, which opens a dropdown menu with two options: 'SDM Safety Assessment' and 'SDM Family Risk Evaluation'.

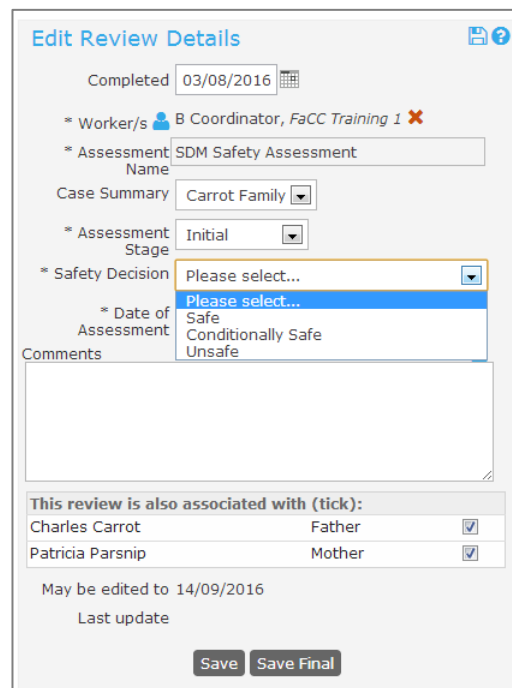
Additional Notes :

- 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 03/08/2016

* Worker/s  B Coordinator, FaCC Training 1 

* Assessment Name SDM Safety Assessment

Case Summary Carrot Family

* Assessment Stage Initial

* Safety Decision Please select...

* Date of Assessment Please select...

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

Save **Save Final**



8.3 Complete *SDM Family Risk Evaluation*

Note: The *SDM Family Risk Evaluation* in ARC only captures the outcomes of the assessment for reporting purposes, not the actual assessment.

1. Select **SDM Family Risk Evaluation** 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***:
for *SDM Family Risk Evaluation* - *Initial* only, for entry assessment
5. Complete details for : **Final Risk Level***, **Override Applied*** (if Yes, record the **Scored Risk Level**), and **Date of Assessment***.
6. Record any notes in the **Comments** box.
7. Select **Save** to save a draft. After saving, you can attach documents.
8. Associate the assessment with relevant family members by selecting the appropriate person/s in the **This review is also associated with (tick):** section.
9. Select **Save** to save a draft, or **Save Final** to lock the assessment.

Edit Review Details

Completed
03/08/2016

* Worker/s
 B Coordinator, FaCC Training 1


* Assessment Name
SDM Family Risk Evaluation

Case Summary
Carrot Family

* Assessment Stage
Initial

* Final Risk Level
Low

* Override Applied
Please select...

* Date of Assessment
Please select...
Yes, Policy
Yes, Discretionary
No

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

Save Save Final

9 Plans

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

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

9.1 Create Plan






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

3. Enter the **Date*** and **Review date** (if required) by using the calendar icon.
4. In the **Description** field, record the name of your plan in line with the procedures of your service.
5. The **Oversight** field will default to the user entering the Plan. If additional workers are involved in the Plan, select the icon to add the relevant worker/s from the drop down list. To delete workers, select the icon
6. In the **This plan is also associated with** section, select the family members involved in this Plan (as for the Case Summary).
7. Click **Save**. Once the plan is saved, you are able to add 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' for Carissa Carrot. The form includes fields for Date (05/05/2016), Review Date (17/08/2016), Worker (A Coordinator), and Work Group (Carrot Support Plan). The 'Oversight' field is set to 'A Coordinator, FaCC Training 1'. The 'Actions' section is currently empty, and a red circle highlights the 'Create New Action' button in the top right corner of this section.

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

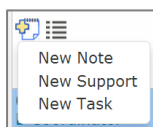
Date: 05/05/2016
 Review date:
 Closed date:
 * Oversight: A Coordinator, FaCC Training 1
 Last update: A Coordinator, FaCC Training 1 05/05/2016 14:46:29

Domain: Health
 Concerns and Worries: ...enter details here..
 Strengths and Resources: ...enter details here..
 Service:

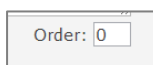
Goal: ...enter details here..
 Outcome: Goal not achieved 1 0 Goal fully achieved 0 5 N/A 0
 Comments on Outcome:

Order: 0

Save Delete Print View




Within an Action, the icon with the yellow cross provides a short-cut to record a **Note**, **Support** 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**.

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 **Plans** Days Cases Reports Admin

Recent List
Carissa Carrot
Patricia Parsnip
Beverley Banana
Charles Carrot
Peter Potato

Plans Filter Create New Plan View Prior

No current Plans to display

Prior Plans

Date	Review Date	Worker	Work Group	Description
05/05/2016	17/08/2016	A Coordinator		Carrot Support Plan

1 to 1 of 1

Edit Plan Details

Date: 05/05/2016 This plan is also associated with (tick): Charles Carrot Father ☒ Review date: 17/08/2016

* Oversight: A Coordinator, FaCC Training 1 ☒ Close date: 05/05/2016

Description: Carrot Support Plan Last update: A Coordinator, FaCC Training 1 05/05/2016 15:04:21

Actions Create New Action View Prior

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..	...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..	...enter details here..	Review: Closed:

Prior Actions

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

Edit Action Details

Date: 05/05/2016 Domain: Health Goal: ...enter details here.. Actions: ...enter details here..

Review date: ...enter details here..

Closed date: 05/05/2016

* Oversight: A Coordinator, FaCC Training 1 ☒

Last update: A Coordinator, FaCC Training 1 05/05/2016 15:04:21

Outcome: Goal not achieved 1 0 Goal fully achieved 0 5 N/A 0

Comments on Outcome

Order: 0

Family name search GO

Print View Save Delete

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 'FaCC Training 1' and is viewing the 'Supports' tab for 'Peter Potato'. The 'Create New Support / Brokerage' button is highlighted with a red circle. The 'Support type' dropdown menu is also highlighted with a red circle, showing options for 'Emergency Relief' and 'Brokerage'. The 'Amount \$' field is visible below the dropdown. The 'Details' section contains fields for 'Provider Name', 'Service Type', 'Expenditure type', 'Brokerage code', 'Method of payment', and 'Payment date'. The 'Payment' sub-tab is selected, and the 'Approval' sub-tab is also visible. The 'Save' button is at the bottom right.

3. Enter **Date*** for recording Support request. This can be backdated.
4. The **Worker/s** field will default to the user entering the Support details.
To add more workers, select the icon. To delete workers select the icon.
5. Select **Support type*** : *Emergency Relief* or *Brokerage*.
Emergency Relief – for a family’s immediate need eg. baby formula, nappies, food.
Brokerage – for specialist goods and/or services that contribute to the overall needs and wellbeing of the child and family as part of their Support Plan.
6. Enter the financial/dollar **Amount*** for the support provided.
7. Record description in the **Details** box. eg. nature of and reason for support.
8. In the **Payments sub-tab**, complete the **Provider Name**, **Service Type***, **Expenditure type** (goods or services), **Brokerage code**, **Method of payment** and **Payment date***.
The use of these fields is as prescribed by the procedures of your service.
9. Select **Save**. The Support record will appear in a list on the left-hand side of the screen.

The screenshot shows the 'supporting families' FaCC Training 1 interface for Peter Potato (Male, DOB: 15/05/2005, Age 11 yrs). The 'Supports' tab is active, displaying a table of Support/Brokerage records:

Date ↑	Worker / Type	Details	Amount
03/08/2016	B Coordinator Brokerage	Medical Assessment	\$120.00
03/08/2016	B Coordinator Brokerage	Participation in After School Care - FOC	\$0.00
03/08/2016	B Coordinator Brokerage	Medical supplies	\$40.00
Total:			\$160.00

Below the table is an 'Export Support / Brokerages' button. To the right, the 'Edit Support/Brokerage Details' form is visible, showing fields for Date (03/08/2016), Worker/s (B Coordinator, FaCC Training 1), Case Summary (Potato Family), Support type (Brokerage), Amount (\$120.00), Details (Medical Assessment), and Payment/Approval section.

Additional Notes:

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

10.2 Approve Support / Brokerage Payment

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

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

The screenshot shows the 'Approval' sub-tab of the 'Edit Support/Brokerage Details' form. The 'Approval' tab is selected and circled in red. The form contains the following fields:

- Approved: ☒ Yes ☐ No
- Reason not approved:
- Authorised by:
- Position:
- Authorised date:
- Last update: A Coordinator, FaCC Training 1 05/05/2016 15:10:19
- Buttons: Save, Delete, Print View

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 'FaCC Training 1' interface for 'Carissa Carrot'. The 'Tasks' tab is selected, and the 'Create New Task' button is highlighted with a red circle. The 'Edit Task Details' panel on the right includes fields for Task date, Start time, End time, Worker/s (A Coordinator, FaCC Training 1), Task type, Notes, Send to calendar (Yes/No), This task is also associated with (tick): Charles Carrot, Father, Created 05/05/2016, Completed/Closed, Last update, and a Save button.

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

Save Delete

Print View

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

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

supporting families 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 Days Cases Reports Admin

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 Internal case review meeting
02/05/2016	7:00 am 8:00 am	A Coordinator	Review Review file for Carrot family

Export Tasks 1 to 2 of 2

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

supporting families 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 Days Cases Reports Admin

Today May 2016 Day Week Month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21

Review
Task Date: 05/05/2016
Start Time: 08:00 am
End Time: 09:00 am
Notes: Internal case review meeting
Workers: 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.

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

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

Due Date Between: Start date 01/05/2016 End date 10/07/2016 Go Calendar View ?

My Tasks

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

1 to 3 of 3

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

Recent List
Patricia Parsnip
Carissa Carrot
James Anderson
Connor Turner
Oscar Baker

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.

Tasks: Filter Calendar View Create New Task

Filter: From: To: Type: Worker: Go Clear



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

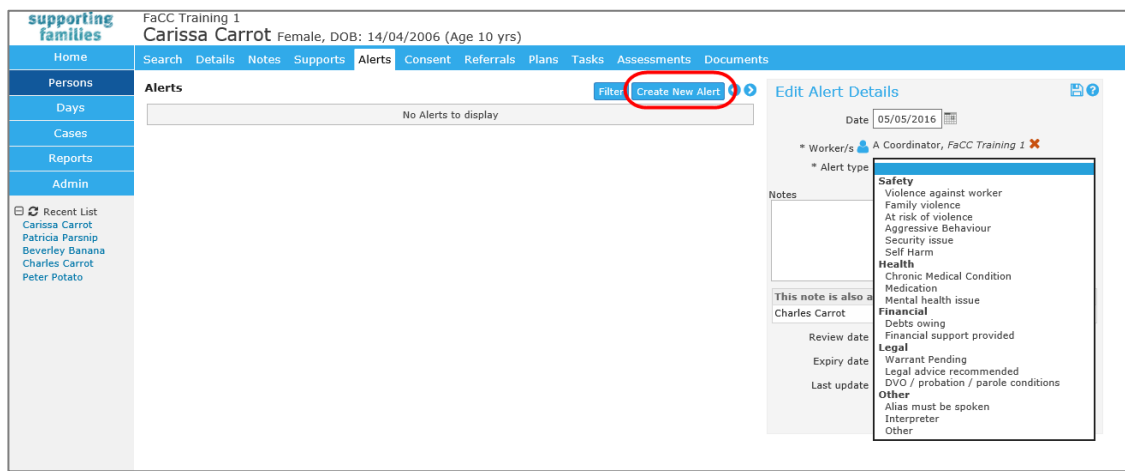
Export Tasks 1 to 2 of 2

- 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.

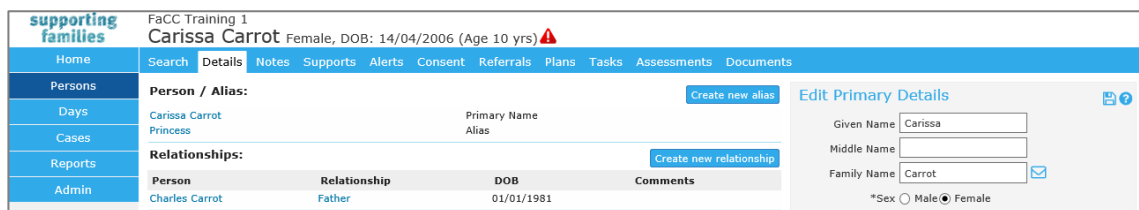
11.2 Create an Alert

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**.



6. Enter details about the Alert in the **Notes** box.
7. Tick the checkbox against related Persons, as relevant, to have the Alert also display on their record.
8. Enter a **Review date** (the task will appear in the **My Actions** / **Team Actions** tabs on the **Home** page).
9. Select **Save**. A warning icon will appear next to the person's name, as highlighted below.
(For the icon to display, click out of the Person record and then open it again).
A red icon relates to a safety risk and a blue icon for all other alerts. Once the alert expires, the warning icon will no longer be visible in the banner.



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

Additional Notes:

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

12 Managing Referrals

This section outlines the important functionality for :

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

12.1 Making 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.

The screenshot shows the 'supporting families' interface. At the top, it says 'FaCC - UAT Service' and 'Peter Potato Male, DOB: 15/05/2005 (Age 11 yrs)'. The 'Referrals' tab is selected. A red circle highlights the 'Create new Referral' button. A red rectangle highlights the 'Referral' form, which includes radio buttons for 'Search', 'Favourites', 'Manual', and 'Family Services' (selected). Below these are input fields for 'Send referral to' and a 'Submit' button.

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

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

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

supporting families

FaCC Training 1

Advice, Referral and Case Management (ARC) - Training

Home

My List

Team List

My Actions

Team Actions

Referrals

Service Directory

Enquiry

Persons

Days

Cases

Reports

Admin

Recent List

Carissa Carrot

Patricia Parsnip

Beverley Banana

Charles Carrot

Peter Potato

Received

Accepted

Declined

Sent

Draft

Referrals

	<div><div></div><div></div></div> Id	<div><div></div><div></div></div> Send Date	<div><div></div><div></div></div> Status	<div><div></div><div></div></div> Sent From	<div><div></div><div></div></div> Sent To	<div><div></div><div></div></div> Sent By	<div><div></div><div></div></div> Client
<div><div></div><div></div></div>	205	05/05/2016	Waiting	Hamilton Island FaCC FaCC Training 1	abc	D Coordinator	Natalie Cherry DOB: 31/07/2012 Gender: Female
<div><div></div><div></div></div>	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
<div><div></div><div></div></div>	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 says 'FaCC - UAT Service' and 'Peter Potato Male, DOB: 15/05/2005 (Age 11 yrs)'. The user is 'Worker Two (Coordinator)'. The 'Referrals' tab is active. A table lists a referral with ID 342, dated 02/08/2016, status 'Accepted', from 'FaCC - UAT Service', and to 'IFS - UAT Service'. A 'Submit' button is highlighted with a red circle. A dropdown menu for 'Family Services' is open, showing options: 'IFS - Brisbane South', 'Churches of Christ Care', 'IFS Generic', 'IFS Generic organisation', and 'IFS - UAT Service'.

The Referral form appears.

The 'Referral' form is displayed. It includes the following sections and fields:


- Status:** New referral
- From:** FaCC - UAT Service
- To:** IFS - UAT Service
- Service:** IFS - UAT Service
- Program / Group:** (empty field)
- Organisation:** IFS - UAT Service organisation
- For:** Peter Potato
- Referred Persons:** (empty field)
- Please save record to associate clients** (button)
- Details:**
 - * Service Type: (dropdown menu)
- Presenting issues:** (text area)
- Additional Information:** (text area)
- Attachments:** (button)
- Referral History:** (button)
- Consent to send:** Yes (radio button) / No (radio button)
- Comment:** (text area)
- Buttons:** Save Draft, Send

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 the 'Referral' form with a pink error message at the top: 'Service Type field must be completed. Record was not saved.' The form fields include: Status (New referral), From FaCC - UAT Service, To IFS - UAT Service, Service (IFS - UAT Service), Program / Group, Organisation (IFS - UAT Service organisation), For Peter Potato, Referred Persons, and a button 'Please save record to associate clients'. The 'Details' section is expanded, showing the '* Service Type' dropdown menu, which is highlighted with a red rectangle. Below this are sections for 'Presenting issues', 'Additional Information', 'Attachments', 'Referral History', and a 'Consent to send' section with radio buttons for 'Yes' and 'No'. A 'Comment' text area is also present. At the bottom, the 'Save Draft' button is highlighted with a red circle, next to a 'Send' button.

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 'Referred Persons' section expanded. It lists 'Person' as '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.

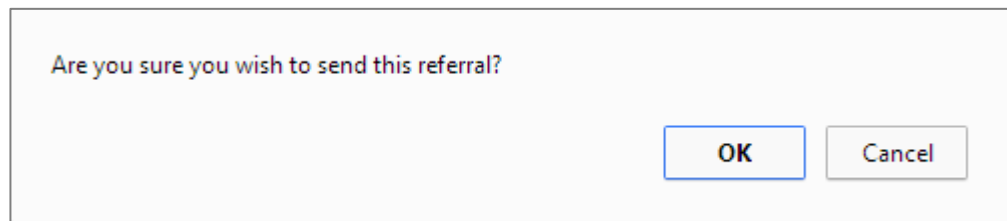
12. Select **Client File** then select the information you wish to attach to the referral. The open Case Summary is included in the Client File. A validation message will appear if there is no open Case Summary. Select the **Page control, Order, Export Period** (to define how the information will be 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.

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



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

The screenshot shows the 'supporting families' interface. The top navigation bar includes 'Home', 'Search', 'Details', 'Notes', 'Supports', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Assessments', and 'Documents'. The left sidebar has 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area shows a referral for 'Peter Potato' (Male, DOB: 15/05/2005, Age 11 yrs). The 'Referrals' tab is active, showing a table with one referral: ID 190, Referral Date 02/03/2017, Status 'Waiting', From 'Hamilton Island FaCC FaCC Training 1', and To 'Hamilton Island IFS IFS Training 1'. The 'Referral' details on the right show 'Referral sent 02/03/2017 18:04:45', 'Status: Waiting', 'From: Hamilton Island FaCC', 'To: Hamilton Island IFS', 'Service: Hamilton Island IFS', 'Organisation: IFS Training 1', 'For: Peter Potato', 'Referred Persons', 'Additional associated clients', 'Details', 'Service Type: Referred - Intensive Family Support', 'Attachments' (client_file_2280.pdf, client_file_1_Original referral.pdf, client_file_2_Family consent.docx), and 'Referral History'.

... AND on the **Home** Page, **Referrals** tab, **Sent** sub-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 left sidebar has 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area shows the 'Referrals' tab with the 'Sent' sub-tab selected. The 'Referrals' table has columns: Id, Send Date, Status, Sent From, Sent To, Sent By, and Client. The table contains one row: ID 190, Send Date 02/03/2017 18:04:45, Status 'Waiting', Sent From 'Hamilton Island FaCC FaCC Training 1', Sent To 'Hamilton Island IFS IFS Training 1', Sent By 'A Coordinator', and Client 'Peter Potato DOB: 15/05/2005 Gender: male'. The bottom of the table shows '1 to 1 of 1 results'.

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

16. 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.

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

The screenshot shows the 'supporting families' FaCC - UAT Service interface. The user is logged in as Carissa Carrot (Female, DOB: 14/04/2006, Age 10 yrs). The 'Referrals' tab is active, and the 'Create new Referral' button is visible. The 'Referral' form on the right shows the 'Manual' option selected under 'Referral' (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 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 'Referral' form displays 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 this, the 'Referral sent' date is set to 07/03/2017. The 'Status' is 'New referral'. The form shows the referral is 'From Hamilton Island FaCC' and 'To ABC Better Living'. The 'Service' is 'ABC Better Living'. The 'Program / Group' and 'Organisation' fields are empty. The 'Phone' is '1234 9876'. The 'Fax' and 'Email' fields are empty. Below the form, there is a section for 'For Carissa Carrot' and 'Referred Persons'. A button 'Please save record to associate clients' is visible. The 'Details' section shows the '* Service Type' dropdown menu.

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

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

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

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

8. Enter in **Presenting Issues** and **Additional Information** if required.
9. Enter any **Comments** and select **Save Draft**.
10. 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. 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)

12. 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 or printed/faxed 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.

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.



FaCC Training 1

Carissa Carrot

Male, DOB: 14/04/2006 (Age 10 yrs)

Home

Persons

Days

Cases

Reports

Admin

Search

Details

Notes

Supports

Alerts

Consent

Referrals

Plans

Referrals

Create new Referral

	ID	Referral Date	Status	From	To
	206	07/03/2017	Accepted	Hamilton Island FaCC FaCC Training 1	Hamilton Island IFS IFS Training 1
	208	07/03/2017	Waiting	Hamilton Island FaCC FaCC Training 1	ABC Better Living

FaCC Training 1

Advice, Referral and Case Management (ARC) - Training

[Home](#)
[Persons](#)
[Days](#)
[Cases](#)
[Reports](#)
[Admin](#)

[My List](#)
[Team List](#)
[My Actions](#)
[Team Actions](#)
[Referrals](#)
[Service Directory](#)
[Enquiry](#)

[Received](#)
[Accepted](#)
[Declined](#)
[Sent](#)
[Draft](#)

Referrals

	Id	Send Date ↓	Status	Sent From	Sent To	Sent By	Client
	208	07/03/2017	Waiting	Hamilton Island FaCC Training 1	ABC Better Living	B Coordinator	Carissa Carrot DOB: 14/04/2006 Gender: male
	206	07/03/2017	Accepted	Hamilton Island FaCC Training 1	Hamilton Island IFS	B Coordinator	Carmile Carrot DOB: 02/02/2012 Gender: male

1 to 2 of 2 results

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

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

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

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

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

The screenshot shows the ARC FaCC interface. The top navigation bar includes Home, Search, Details, Notes, Supports, Alerts, Consent, Referrals, Plans, Tasks, Assessments, and Documents. The left sidebar shows a list of persons: Carissa Carrot, Patricia Parsnip, Beverley Banana, Charles Carrot, and Peter Potato. The main content area displays the Referrals tab with a table of referrals. The table has columns for Id, Referral Date, Status, From, and To. The first row shows a referral from Hamilton Island FaCC to ABC Better Living. The second row shows a referral from Hamilton Island FaCC to Lady Elliot Island FaCC. To the right of the table is a 'Referral' form. The form has a search bar with the text 'Maroochydore' and a 'Search' button. Below the search bar is a list of search results from the Service Seeker database. The first result is 'Child Support Agency, Maroochydore'. The 'Make a referral' button is highlighted with a red circle.

The Referral form will appear.

The screenshot shows the 'Referral' form. At the top, there is a warning message: '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, there is a 'Referral sent' field with the date '03/08/2016'. The 'Status' is 'New referral'. The 'From' field is 'FaCC - UAT Service'. The 'To' field is 'Child Support Agency, Maroochydore'. The 'Service' field is 'Child Support Agency, Maroochydore'. The 'Program / Group' field is empty. The 'Organisation' field is 'Commonwealth Department of Human Services'. The 'Phone' field is '13 1107'. The 'Fax' field is '1300 309 949'. The 'Email' field is empty. Below the form fields, there is a section for 'For Peter Passionfruit' and 'Referred Persons'. At the bottom, there is a 'Details' section with a 'Service Type' dropdown menu.

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 displays the 'supporting families' interface for a user named Peter Passionfruit (Male, DOB: 20/01/2010, Age 6 yrs). The 'Referrals' tab is active, and the 'View Recalled and Declined' link is highlighted. A table lists referrals, with one entry (Id: 334, Date: 01/08/2016, Status: Declined) highlighted in red. The 'Status' field in the details panel is also circled in red.

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

Referral Details:

- Referral sent: 01/08/2016 09:52:27
- Status: Declined
- From: FaCC - UAT Service
- To: IFS - UAT Service
- Service: IFS - UAT Service
- Organisation: IFS - UAT Service organisation
- For: Peter Passionfruit
- Referred Persons: Peter Passionfruit, Pamela Passionfruit
- * Service Type: Referred - Intensive Family Support
- Attachments: client_file_3145.pdf (Uploaded: 01/08/2016 09:52:19)
- Referral History: Consent to send Yes, Reason declined: Insufficient information to assess referral

12.2 Receiving Referrals

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

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

12.2.1 To accept a Referral

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


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

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

Persons Received Accepted Declined Sent Draft

Referrals

Id	Send Date	Status	Sent From	Sent By	Client
185	02/03/2017 13:30:53	Waiting	Hamilton Island IFS IFS Training 1	A Coordinator	Peter Pumpkin DOB: 02/06/2012 Gender: male
182	02/03/2017 09:18:28	Waiting	familychildconnect online	Mary Mushroom	Michael Mushroom DOB: 20/01/2004 Gender: male

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

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

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

Persons Received Accepted Declined Sent Draft

Referrals

Id	Send Date	Status	Sent From	Sent By	Client
185	02/03/2017 13:30:53	Waiting	Hamilton Island IFS IFS Training 1	A Coordinator	Peter Pumpkin DOB: 02/06/2012 Gender: male
182	02/03/2017 09:18:28	Waiting	familychildconnect online	Mary Mushroom	Michael Mushroom DOB: 20/01/2004 Gender: male

1 to 2 of 2 results

Referral

Link referral to database

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

Given name: Michael Family name: Mushroom

☒ Fuzzy

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

Add Michael Mushroom as new Person

Referral sent 02/03/2017 09:18:28

Status: Waiting

Reference: Q2QD-S4C6

From: familychildconnect online

To: FaCC Training 1

Service: FaCC Training 1

Organisation: Hamilton Island FaCC

For Michael Mushroom

Referred Person: Mary Mushroom Relationship: Mother

Additional associated clients: Mary Mushroom Relationship: Mother

Details

Risk/Safety Q: If there are concerns about domestic violence, is there a phone number and/or particular time when it is safer to contact the victim of the violence to provide support?

A: Nil

Family Support Q: What are you worried about regarding this family?

A: Recently, I've noticed that Michael's behaviour has deteriorated and the principal contacted me recently about Michael not being at school. This was a shock to me. I need help to work with Michael to understand why things have changed.

Q: What type of support does this family need?

A: * Child wellbeing * Parenting skills

Attachments

File Name	Uploaded
Referral_Q2QD-S4C6.pdf	02/03/2017 09:18:29

Referral History

Comment

Linked Enquiry

There are no records associated.

Acknowledge Update PDF

Create New

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.

The screenshot shows a window titled 'Linked Enquiry'. At the top right is a 'Create New' button, which is circled in red. Below the title bar, a light blue message box states 'There are no records associated.' At the bottom of the window are three buttons: 'Acknowledge', 'Update', and 'PDF'.

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.

The screenshot shows the 'Linked Enquiry' window after a record has been added. The 'Create New' button is still present. Below it is a table with columns 'Date', 'Type', and 'Notes'. The table contains one row: '02/03/2017', 'Enquiry: Community', and an empty 'Notes' field. Below the table, it says '1 to 1 of 1 results'. At the bottom, the 'Acknowledge' button is circled in red, along with the 'Update' and 'PDF' buttons.

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

The screenshot shows a 'Message from webpage' dialog box. It contains a yellow warning icon and the text: 'Please link an enquiry to this referral via the Linked Enquiry section'. There is an 'OK' button at the bottom right.

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

The screenshot shows the 'Referral' form. At the top, there's a 'Link referral to database' section with a message: 'This external referral is not yet associated with a Person on your database. If you plan to accept this referral you must first create a Person record, or associate the referral with an existing Person.' Below this, there are input fields for 'First: Peter' and 'Last: Potato'. A 'Fuzzy' checkbox is checked. A 'Search' button is to the right. Below the search fields is a table with columns 'First Name', 'Last Name', 'Gender', and 'DOB'. The table shows one result: 'Peter', 'Potato', 'male', '15/05/2005'. Below the table is a button 'Add Peter Potato as new Person'. At the bottom, it says 'Referral sent 02/08/2016 13:25:41'.

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

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

Where it is 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					
Days	Referrals					
Cases						
Reports						
Admin						
Recent List Peter Potato Peter Passionfruit Carissa Carrot						
		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.

Attachments	
File Name	Uploaded
client_file_3374.pdf	05/05/2017 14:14:36 AEST
Referral History	
Consent to send Yes	
Comment	
Linked Enquiry	
Date ↓	Type
05/05/2017	Enquiry: Community
Notes	
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 *familychildconnect online*, **Accept** the Referral.



Referrals from *familychildconnect online* are not able to be declined, as there is no automated mechanism to advise the referrer of this decision. You need to Accept the referral in ARC and contact the referrer to advise them of the required action.

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

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

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



Referred Persons	
Person	
Alan Robinhood	
Maid Maryon	
Robert Robinhood	

The following message will appear :

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

OK Cancel

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

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

supporting families

FaCC Training 1

Advice, Referral and Case Management (ARC) - Trainin

Home

My List

Team List

My Actions

Team Actions

Referrals

Service Directory

Enqu


Persons

Days

Cases

Reports

Admin

 Recent List

Peter Potato

Carissa Carrot

Cedric Cucumber

Thomas Books

Received



Accepted

Declined

Sent

Draft

Referrals

	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.

supporting families

FaCC Training 1

Michael Mushroom Male, DOB: 20/01/2004 (Age 13 yrs)

Home

Search

Details

Notes

Supports

Alerts

Consent

Referrals

Plans

Tasks

Assessments

Documents

Persons

Days


Cases

Reports

Admin

Referrals

Create new Referral

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 ARC FaCC User Manual interface. On the left is a sidebar with navigation links: Home, Persons, Days, Cases, Reports, Admin, and a Recent List. The main area displays a table of Referrals. The first row is highlighted, and a blue pencil icon is circled next to it. The Referral form is open on the right, showing details for a referral sent on 04/08/2016. The form includes fields for Status, From, To, Service, Organisation, Referred Persons, Person, Details, Attachments, and Referral History. The 'Acknowledge' button is circled at the bottom of the form.

Id	Send Date	Status	Sent From	Sent By	Client
357	04/08/2016 08:21:48	Waiting	IFS - UAT Service	Worker Two	Peter Passionfruit
333	22/07/2016 10:41:46	Waiting	IFS Generic	Ricardo Vassellini	John Doe

1 to 2 of 2 results

Referral form details:

- Referral sent: 04/08/2016 08:21:48
- Status: Waiting
- From: IFS - UAT Service
- To: FaCC - UAT Service
- Service: FaCC - UAT Service
- Organisation: FaCC - UAT Service organisation
- For: Peter Passionfruit
- Referred Persons: Peter Passionfruit, Priscilla Passionfruit
- Details: * Service Type: Referred - Family and Child Connect
- Attachments: client_file_3166.pdf (04/08/2016 08:21:49)
- Referral History: Consent to send Yes

Buttons: Acknowledge, Update, Decline, PDF

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

OK

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

The screenshot shows the Referral form with the 'Reason declined' dropdown menu open. The menu options are: No capacity at this time, Does not meet eligibility requirements, Insufficient information to assess referral, Outside catchment area, and Other reason for declining referral. The 'Decline' button is circled at the bottom of the form.

Referral form details:

- Consent to send
- Comment
- Reason declined: [Dropdown menu]

Buttons: Decline, PDF

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

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 Days Cases Reports Admin

Received Accepted **Declined** Sent Draft

Referrals

Id ↓	Send Date	Status	Sent From	Sent By	Client
357	04/08/2016 08:21:48	Declined	IFS - UAT Service IFS - UAT Service organisation	Worker Two	Peter Passionfruit DOB: 20/01/2014 Gender: Male
351	03/08/2016 14:40:38	Declined	IFS - UAT Service IFS - UAT Service organisation	Amanda Suitor	Boris Badenov DOB: 01/01/2000 Gender: Male

Recent List
Alan Robinhood
Peter Potato
Peter Passionfruit
Carissa Carrot

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

Referral History

Referral sent by Worker Two, IFS - UAT Service 8:21am Thu 04/08/16

Referral declined by Worker Two, FaCC - UAT Service 8:24am Thu 04/08/16

Consent to send Yes

Reason declined Other reason for declining referral

PDF

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 ie. Coordinators can access all records within your workgroup.

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

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

The screenshot displays the 'FaCC - UAT Service' interface for a person named Carissa Carrot. The interface includes a sidebar with navigation links (Home, Persons, Days, Cases, Reports, Admin) and a main content area with various tabs (Search, Details, Notes, Supports, Alerts, Consent, Referrals, etc.). The 'Details' tab is active, showing sections for Person / Alias, Relationships, Profiles, Cases, Address, Phone & other contacts, and Key Workers. At the bottom right, the 'Restriction' button is highlighted with a red circle.

Name	Primary/Alias	Comments
Carissa Carrot	Primary Name	

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

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

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

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

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

Buttons at the bottom: Restriction, Export Details, Refresh

2. The following screen will appear :

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

Click **Save**.

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

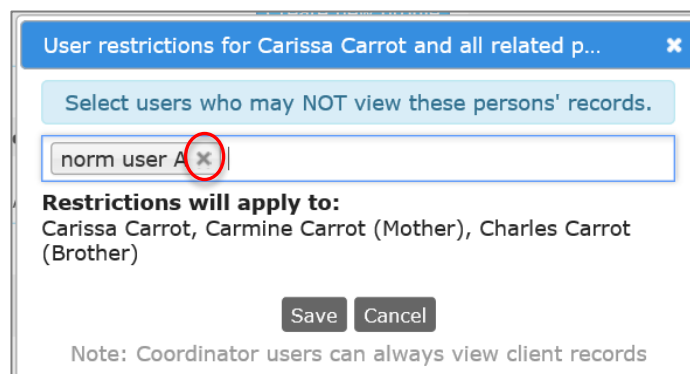
Key points :

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

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.

FaCC - UAT Service
Advice, Referral and Case Management (ARC)

Worker Two (Coordinator)

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

Persons
Days
Cases
Reports
Admin

Person Views
Person Updates
Person User Restrictions
Referral Views

Start Date 04/05/2018
End Date 04/05/2018
Person Id 3158
Worker Please select...
Go

Search Results

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

1 to 1 of 1 results

DESCRIPTION: Shows changes made to person user restrictions

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

14 Days

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

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

Home **Notes** Supports Tasks

Persons List date 05/05/2016

Days

Cases

Reports

Admin

Recent List
Olivia Olive
Beverley Banana
Peter Potato
Carissa Carrot
Patricia Parsnip
Charles Carrot

Notes:

Filter Create New Note

	Given Name	Family Name	DOB	Contact Type
1	Lisa	Apple	01/01/1984	✕ ⓘ
2	Lisa	Apple	01/01/1984	✕ ⓘ
3	Melinda	Apple	06/05/2008	✕ ⓘ
4	Melinda	Apple	06/05/2008	✕ ⓘ
5	Stepanie	Apple	15/07/2012	✕ ⓘ
6	Stepanie	Apple	15/07/2012	✕ ⓘ
7	Barry	Beetroot	18/08/2008	ⓘ
8	Barry	Beetroot	18/08/2008	ⓘ

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.

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

Home Notes Supports **Tasks**

Persons List date 05/05/2016

Days

Cases

Reports

Admin

Recent List
Olivia Olive
Beverley Banana
Peter Potato
Carissa Carrot
Patricia Parsnip
Charles Carrot

Tasks:

Filter Create New Task

	Given Name	Family Name	Worker	Task
1	Beverley	Banana	A Coordinator	For review of Actions and identify any new issues
2	Carissa	Carrot	A Coordinator	Internal case review meeting
3	Charles	Carrot	A Coordinator	Internal case review meeting

Search for person to create new Task for 05/05/2016

Given Name

Family Name banana

Sex ☐ Male ☒ Female

Fuzzy ☒

Search or Select From Recent 70

Results

Given Name	Family Name	Sex	DOB	Match
Beverley	Banana	Female	01/01/00	0
Briana	Banana	Female	01/04/81	0

1 to 2 of 2

Add new Person

- 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.

The screenshot shows the 'supporting families' FaCC Training 1 interface. The user is logged in as Penelope Passionfruit (Female, DOB: 21/04/1985, Age 34 yrs). The 'Documents' tab is selected in the top navigation bar. In the 'Documents' section, the 'Create New Document' button is highlighted with a red circle. To the right, the 'Edit Document Details' form is displayed. It includes fields for 'Date' (27/06/2019), 'Bring Up', 'Worker/s' (A Coordinator, FaCC Training 1), 'Document Type' (Attachment), 'Document Type' (Attachment), 'Case Summary' (Passionfruit (27/06/2019 - current)), and 'Description'. Below the form, a table shows records associated with the document:

Name ↑	Relationship	Associate record with:
Patsy Passionfruit	Daughter	<input type="checkbox"/>
Paul Passionfruit	Husband	<input type="checkbox"/>

At the bottom, it says 'May be edited to 04/07/2019' and 'Last update'. There are 'Save' and 'Save Final' buttons.

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

The screenshot shows a 'Type' dropdown menu with the following options: Referral, Assessment, and Other.

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

7. Add a **Description** of the document. (This description will be displayed in the Documents list).
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 'Edit Document Details' form in the FaCC Training 1 system. The form is for a document associated with Penelope Passionfruit. The 'Document' field contains the text 'June 2019 - Initial Counselling report' and a 'Select File...' button. The 'Type' field is set to 'Assessment'. The 'Case Summary' field is set to 'Passionfruit (27/06/2019 - current)'. The 'Description' field contains 'June 2019 - Initial Counselling report'. The form also includes a table for 'This document is associated with (tick):' with columns for Name, Relationship, and Associate record with. The table lists Patsy Passionfruit (Daughter) and Paul Passionfruit (Husband). The form has buttons for 'Save', 'Delete', and 'Save Final'.

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

The 'Upload File' dialog box is shown. It has a 'Select File' field with a 'Browse...' button. Below the field are 'Upload File' and 'Cancel' buttons. The 'Instructions' section provides guidance on how to use the dialog.

Instructions

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

12. Click **Browse** and locate the file you would like to upload.
13. Click **Up Load File**. The document will be attached to the person record and the filename will be displayed in the Document field.

The screenshot shows the 'Edit Document Details' form in the ARC FaCC system. The form is for a document titled 'June 2019 - Initial Counselling report' created on 27/06/2019 by A Coordinator. The document type is 'Attachment' and the file is 'Mind Matters _ 15June report.docx'. The form includes fields for Date, Bring Up, Worker/s, Document Type, Document, Type, Case Summary, and Description. There is a section for 'This document is associated with (tick):' with checkboxes for Patsy Passionfruit (Daughter) and Paul Passionfruit (Husband). The form also shows a 'May be edited to 04/07/2019' notice and a 'Last update' timestamp. At the bottom, there are buttons for 'Save', 'Delete', 'Save Final', and 'View Document'.

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.

The screenshot shows the 'Document Details' view for the same document. The details are displayed in a list format: Date (27/06/2019), Bring Up (A Coordinator, FaCC Training 1), 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), and Description (June 2019 - Initial Counselling report). The 'Last update' is 27/06/2019 15:00:46 AEST. The 'Edit locked' status is shown as '27/06/2019' with a blue lock icon circled in red. A 'View Document' button is at the bottom.

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).

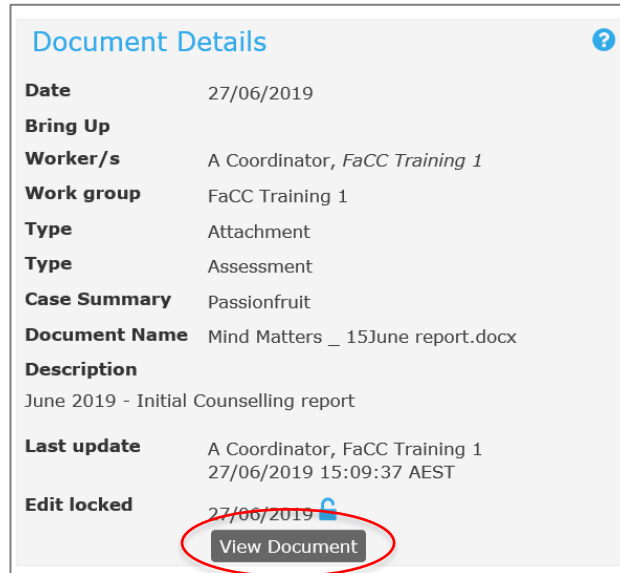
Additional Notes:

- 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

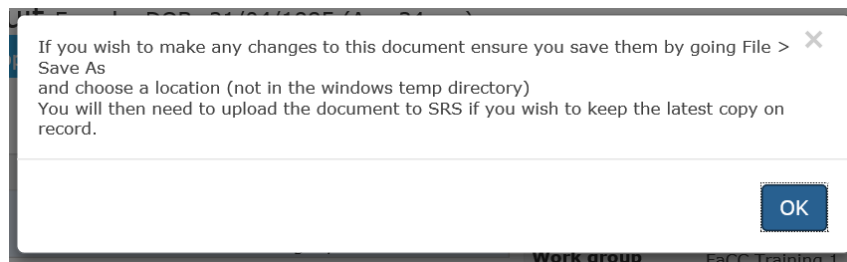
Document Name Mind Matters _ 15June report.docx

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.



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

OK

Click **OK**.

15.2.2 To change the document:

1. The Document record can not 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.

supporting families FaCC Training 1 Penelope Passionfruit Female, DOB: 21/04/1985 (Age 34 yrs)

Search Details Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents

Documents Filter Create New Document

Date ↑	Worker	Document Type
27/06/2019	A Coordinator	Attachment Mind Matters _ 15June report.docx June 2019 - Initial Counselling report

Export Properties of Documents 1 to 1 of 1

Family name search GO

Edit Document Details

Date 27/06/2019

Bring Up

* Worker/s A Coordinator, FaCC Training 1

Document Type Attachment

Document **Mind Matters _ 15June report.docx** (Max File Size: 5 MB)
Change...

Type Assessment

Case Summary Passionfruit (27/06/2019 - current)

Description June 2019 - Initial Counselling report

This document is associated with (tick):

Name ↑	Relationship	Associate record with:
Patsy Passionfruit	Daughter	<input type="checkbox"/>
Paul Passionfruit	Husband	<input type="checkbox"/>

May be edited to 28/06/2019

Last update A Coordinator, FaCC Training 1
27/06/2019 15:19:23 AEST

Save Delete Save Final

View Document

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.

supporting families FaCC Training 1 Penelope Passionfruit Female, DOB: 21/04/1985 (Age 34 yrs)

Search Details Notes Supports Alerts Consent Referrals Plans Tasks Assessments Documents

Documents Filter Create New Document

Date ↑	Worker	Document Type
27/06/2019	A Coordinator	Attachment Mind Matters _ 15June Initial report.docx June 2019 - Initial Counselling report

Export Properties of Documents 1 to 1 of 1

Family name search GO

Edit Document Details

Date 27/06/2019

Bring Up

* Worker/s A Coordinator, FaCC Training 1

Document Type Attachment

Document **Mind Matters _ 15June Initial report.docx** (Max File Size: 5 MB)
Change...

Type Assessment

Case Summary Passionfruit (27/06/2019 - current)

Description June 2019 - Initial Counselling report

This document is associated with (tick):

Name ↑	Relationship	Associate record with:
Patsy Passionfruit	Daughter	<input type="checkbox"/>
Paul Passionfruit	Husband	<input type="checkbox"/>


May be edited to 28/06/2019

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

Save Delete Save Final

View Document

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.



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

The screenshot shows the 'supporting families' logo and the title 'FaCC Training 1 Advice, Referral and Case Management (ARC) - Training'. The navigation bar includes 'Home', 'Reports' (circled), 'Lists', 'Financial', 'Referrals', 'Custom', and 'Results'. The left sidebar has 'Persons', 'Days', 'Cases', 'Reports' (highlighted), and 'Admin'. The main content area shows 'Workgroup' as 'FaCC Training 1'. The 'Report type' dropdown is open, listing several report types, with 'ARC Performance Report' and 'OASIS Report' highlighted by a red rectangle.

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

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

- **ARC Performance Report**

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

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

- **OASIS Report**

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

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

The **Counting Rules** for each of the measures in the **OASIS Report** are available from the secure section of the familychildconnect.org.au.

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' logo and the title 'FaCC Training 1 Advice, Referral and Case Management (ARC) - Training'. The 'Lists' tab is selected in the top navigation bar. The left sidebar contains a menu with 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area displays the 'Lists' configuration page. The 'Workgroup' is set to 'FaCC Training 1'. The 'List type' dropdown is open, showing a list of options. The 'ARC Performance List' and 'OASIS List' options are highlighted with a red box.

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

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**

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

Home Reports Lists Financial Referrals Custom Results

Persons
Days
Cases
Reports
Admin

Workgroup: FaCC Training 1

Report type: Please select...
Demographic Report
Profile Report
Contact Report
Family Report (using relationships)
Plan Report
ARC Performance Report
OASIS Report

Include in report

Period of Interest

Start date: 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.

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

Home Reports Lists Financial Referrals Custom Results

Persons
Days
Cases
Reports
Admin

Report type: ARC Performance Report

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

Start date

End date

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

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

Home Reports Lists Financial Referrals Custom Results

Persons
Days
Cases
Reports
Admin

Report type: ARC Performance Report

Period of Interest: Last Month

Start date: 01/05/2015

End date: 31/05/2015

Generate Report

Request Submitted

This report may take a few minutes to run. The report will be displayed in the results tab.
The report ID number is: 2095
Please delete the report when no longer of use.

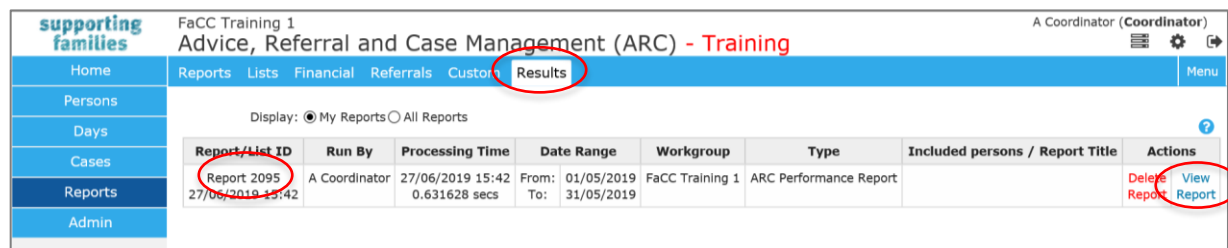
The report can be accessed from the **Results** tab using the report ID number (highlighted above).

16.3 Viewing Report Results

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

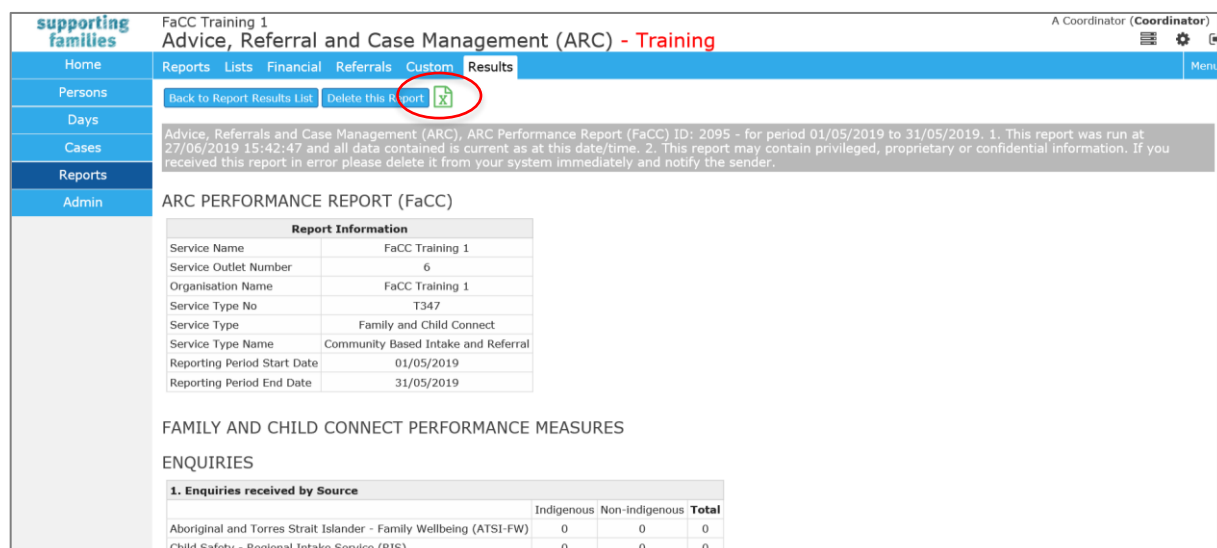
New reports are added at the bottom of the Results list.

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	27/06/2019 15:42 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.



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

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

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**

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

Home Reports Lists Financial Referrals Custom Results

Back to Report Results List Delete this Report

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.

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
Child Safety Service Centre (CSSC)	0	0	0
Community/Friend/Family			
Corrective Services			

Do you want to open or save srsreport.xls from srs-qlt-families-training\infoexchangeapps\net.au? Open Cancel

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

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW srsreport.xls [Read-Only] - Excel Kerry Fortescue

Clipboard Font Alignment Number Styles Cells Editing

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.

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	1/05/2019
Reporting Period End Date	31/05/2019

FAMILY AND CHILD CONNECT PERFORMANCE MEASURES ENQUIRIES

17 Admin Page

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

Users with a Coordinator access level will have additional 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:

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 is not read by others.

Security question

Security response

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

☐ I do not wish to receive these emails

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				
Days	Document List			
Cases	Document Name ↓	Version	Description	Start Date
Reports	Wellbeing Domains Assessment			21/09/2017
Admin	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.

The screenshot shows the ARC FaCC - UAT Service interface. The left sidebar has a menu with 'Admin' highlighted. The top navigation bar includes 'Users', 'Merge', 'Audit', 'Templates', 'Reference Data', and 'About'. The main content area shows filters for Cluster (FaCC - UAT Service), Workgroup (FaCC - UAT Service), and View (Current Users). A search bar is present. Below the filters, a message states: 'The FaCC UAT service account is licensed for up to 22 named users. You currently have 2 spare user licenses.' A table lists current users:

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		

An 'Add new user' button is located in the top right corner of the main content area.

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

The screenshot shows the ARC FaCC User Management interface. The 'Add new user' button is circled in red. The interface includes a sidebar with navigation options (Home, Persons, Days, Cases, Reports, Admin) and a main area with a table of existing users and a form to add a new user.

User Name	User	Date Commenced	End Date	Last Login
amanda.suitor	Amanda Suitor	05/02/2016		29/11/2016
Amodha	Amodha Ratnayake	01/07/2007		07/11/2016
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
frameshni	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 screenshot shows the 'Edit user record' form. The 'Change password' checkbox is highlighted with a red box, and a yellow warning message states '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:

9. The access level for the User will default to 'Normal User'.
If 'Coordinator' access level is required, simply select this level from the list.
Typically, most case workers will require 'Normal User' access level, with managers and team leaders using 'Coordinator'.

The difference between a **Normal User** and a **Coordinator** is illustrated in the following table:

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

FaCC - UAT Service

Add to workgroup:

Last Update: 13/02/2017 17:26:39

Operational Remove ☒

Save

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: [empty]

* Default Cluster: FaCC - UAT Service

Start Date: 13/02/2017

New Password: [masked]

Confirm Password: [masked]

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: [empty]

* Default Cluster: FaCC - UAT Service

Start Date: 13/02/2017

New Password: [empty]

Confirm Password: [empty]

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.

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'.

Edit user record:

* User Name: Carl.Carrot

* First Name: Carl

* Last Name: Carrot

Email Address: [text box]

* Default Cluster: FaCC - UAT Service

Start Date: 13/02/2017

New Password: [text box]

Confirm Password: [text box]

User Blocked: ☐

Change password: ☐

Workgroup	Role	Operations	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

Edit user record:

* User Name: Carl.Carrot

* First Name: Carl

* Last Name: Carrot

Email Address: [text box]

* Default Cluster: FaCC - UAT Service

Start Date: 13/02/2017

New Password: [text box]

Confirm Password: [text box]

User Blocked: ☐

Change password: ☐

The user is not in any workgroup.

Add to workgroup: Please select...

Last Update: Worker Two, FaCC - UAT Service 13/02/2017 17:26:39

Save Remove User

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 screenshot shows the 'supporting families' FaCC Training 1 interface. The user is logged in as 'A Coordinator (Coordinator)'. The navigation menu includes Home, Password, Preferences, Documents, Finance, Bulk Actions, Users, Merge, Audit, Templates, Reference Data, and About. The 'Merge' tab is active, and the 'Search Duplicates' sub-tab is selected. The search form has 'Match Threshold' set to 5 and 'Records' set to 50. The search results dropdown shows: 3 [Possible Match], 4, 5, and 6 [Exact Match].

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

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

To perform the possible duplicates search:

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

The screenshot shows the search results table. The table has columns: View, Person ID, Given Name, Family Name, DOB, Alias?, View, Person ID, Given Name, Family Name, DOB, Alias?, Match, and Merge. The results show two records with a Match of 6. The 'Merge' column has a 'Select' button highlighted with a red circle.

View	Person ID	Given Name	Family Name	DOB	Alias?	View	Person ID	Given Name	Family Name	DOB	Alias?	Match	Merge
	2322	Beverley	Banana	01/01/2000			2336	Beverley	Banana	01/01/2000		6	Select

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

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

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

3. Click on the person icon to open the Person>Details tab for that person record in a new browser tab. You can then easily navigate back to the possible duplicates list.

If you would like to merge the two suggested possible duplicate person records, click the blue **Select** link (highlighted above) to automatically populate the **Merge Persons** sub-tab with the selected records.

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

Additional Notes

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

18.2.2 To Merge two Person records

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

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'.

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

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

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

supporting families FaCC Training 1
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Days Primary Record (details kept) Refresh New Search Go to Client

Cases

Reports

Admin

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
No associated alias or duplicates.

Search for secondary record:
 Given Name
 Family Name banana
 Gender ☐ Male ☐ Female
 Fuzzy ☐
 GO Clear

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

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

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Days Primary Record (details kept) Refresh New Search Go to Client

Cases

Reports

Admin

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
No associated alias or duplicates.

Search for secondary record:
 Given Name
 Family Name banana
 Gender ☐ Male ☐ Female
 Fuzzy ☐
 GO Clear

Results

ID	Given Name	Family Name	Sex	DOB	Alias? Match	Actions
2322	Beverley	Banana	F	01/01/2000	0	Open Select
2326	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 you need to modify any details on the secondary person record, you can click the **Go to Client** button to open the client's **Person Details** tab in another browser tab. Once you have saved any changes in the **Person Details** tab, switch back to the current Merge process and

click the **Refresh** button to update the secondary person record information.

8. Carefully consider both records to ensure they relate to the same client.
Note : in addition to merging the records, clicking **Make Alias** will also create an Alias record from the name and gender details of the secondary person record. For example, the **Make Alias** function would be used if you were merging two records where the person is known under different names (hence the accidental creation of a duplicate record for the person).
9. If you decide that you want to keep the Secondary person record and merge the Primary person record, you can swap the two records by clicking on the arrow icon between the Primary and Secondary forms.(See image below)

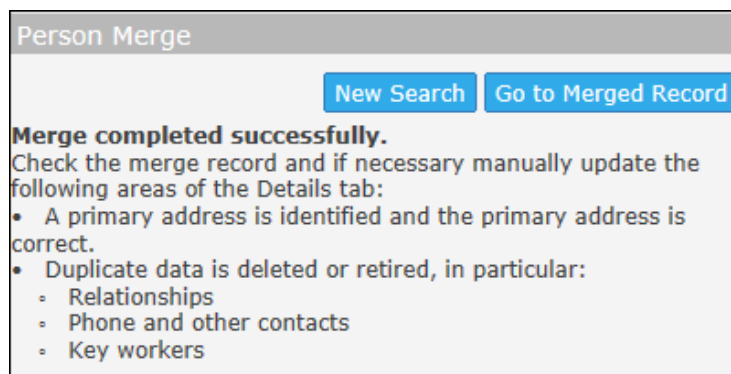
The screenshot shows the 'supporting families' FaCC Training 1 interface. The top navigation bar includes 'Home', 'Password', 'Preferences', 'Documents', 'Finance', 'Bulk Actions', 'Users', 'Merge', 'Audit', 'Templates', 'Reference Data', and 'Admin'. The left sidebar has 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area shows two person records side-by-side. The left record is the 'Primary Record (details kept)' with ID 2322, Name Beverley Banana, Gender female, and Date of Birth 01/01/2000. The right record is the 'Secondary (Merge) Record' with ID 2336, Name Beverley Banana, Gender female, and Date of Birth 01/01/2000. A red circle highlights the arrow icon between the two records, which is used to swap them.

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

The screenshot shows the 'supporting families' FaCC Training 1 interface. The top navigation bar includes 'Home', 'Password', 'Preferences', 'Documents', 'Finance', 'Bulk Actions', 'Users', 'Merge', 'Audit', 'Templates', 'Reference Data', and 'Admin'. The left sidebar has 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area shows two person records side-by-side. The left record is the 'Primary Record (details kept)' with ID 2322, Name Beverley Banana, Gender female, and Date of Birth 01/01/2000. The right record is the 'Secondary (Merge) Record' with ID 2336, Name Beverley Banana, Gender female, and Date of Birth 01/01/2000. A red circle highlights the 'Make Alias' and 'Merge' buttons at the bottom right of the interface.

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

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



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

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.


The screenshot shows the FaCC Training 1 interface. The top navigation bar includes 'Home', 'Persons', 'Days', 'Cases', 'Reports', and 'Admin'. The main content area is divided into two panels. The left panel shows the 'Primary Record (details kept)' for a person with 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, and Last update A Coordinator, FaCC Training 1 05/05/2016 11:25:49 AEST. Below this are sections for 'Addresses' (no registered addresses), 'Documents' (notes, alerts, etc. associated with this record), and 'Alias / Duplicates'. The 'Alias / Duplicates' table has columns for ID, Given Name, Family Name, Alias/Duplicate, and Last Update. It lists a duplicate record with ID 2336, Given Name Beverley Banana, Family Name Banana, Alias/Duplicate A Coordinator, FaCC Training 1, and Last Update 05/05/2016 11:25:49 AEST. A red circle highlights the 'Undo Merge ID(11)' link next to this duplicate record. The right panel shows the 'Person Merge' confirmation message, identical to the one in the previous image.

18.2.4 Deleting an Alias Record


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

Locating the required person record via the **Search for primary record** form will list the person details including any current alias information. Click the blue **Drop Alias** link to delete the alias record that has been incorrectly entered or is no longer valid.

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

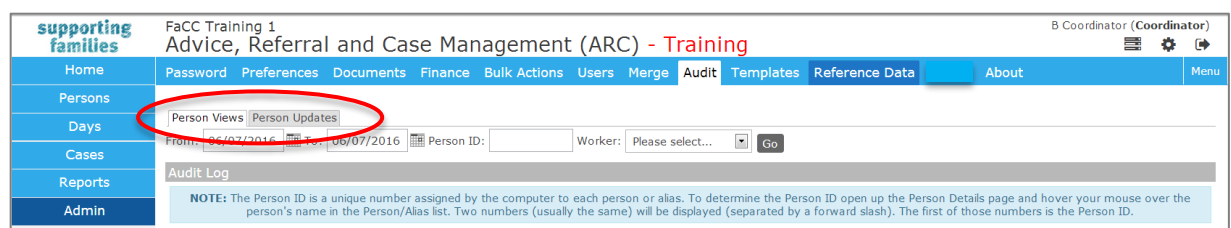
This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon  to access SRS Help or review the SRS product user guides at the following url: <http://srs-support.infoxchangeapps.net.au/user-guides>

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.

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Persons **Person Views** Person Updates

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

Audit Log

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

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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)

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Persons **Person Views** Person Updates

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

Search Results

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

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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

Inboxchange 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 Inboxchange HelpDesk :


- on **1300 366 516** or **(03) 9418 7487**
- or email srs-support@inboxchange.net.au

When you contact the Inboxchange 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:

- <https://www.csyw.qld.gov.au/campaign/supporting-families/resources>
- <https://www.csyw.qld.gov.au/child-family/protecting-children/resources-publications>

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

--ooOoo--