

ARC Factsheet

For all services

Update June 2019

The Cases Page - make it part of your every day!

It's worth it - the Cases Page can bring you lots of benefits in managing your work with families. There are a number of features on the **Cases** Page that make it very easy to locate a Case Summary, ascertain how it is progressing, add new records and access all records. You can also sort Case Summary records by worker, by Case name, by key dates. **It's very helpful!**

Description	Case Worker	Status ↓	Referral Date	Case Creation Date	Date of consent to engage with the service	Closure Date
Dragonfruit	A Coordinator	Open	30/05/2019	31/05/2019		
Frangipani	C User	Open	04/03/2019	05/03/2019	22/03/2019	
Mandarin	G User	Open	08/04/2019	08/04/2019	30/04/2019	

- Each of the columns can be used to sort displayed data, shown by blue arrow. (The **Case worker** is populated from the **Case worker** field on the **Case Summary**.)
- You can open the **Case Summary** by clicking on the blue **Description** name.
- This first view will list ALL the Case Summaries in your service - yes, all Closed and all open Cases since your first commenced recording in ARC.

Click Show Filters (highlighted above) to tailor the criteria for Cases you want to display, using any field or combination of fields:

Click Apply Filters to display the results, **Clear Filters** to perform another search and **Hide Filters** to return to the full Case List.

→ Have you discovered the joy of **Associated Records** ?



To access and create records relevant to your Case, click the icon to open Associated Records.

The first view will display all records associated with that Case. Simply click on the **blue date** to open that record.

The screenshot shows the 'Advice, Referral and Case Management (ARC)' interface. On the left, the 'Case List' table contains the following data:

Description	Case Worker	Status	Referral Date	Case Creation Date	Date of consent to engage with the service	Assessment Date
Dragonfruit	A Coordinator	Open	30/05/2019	31/05/2019		
Frangipani	C User	Open	04/03/2019	05/03/2019	22/03/2019	
Mandarin	G User	Open	08/04/2019	08/04/2019	30/04/2019	
Pineapple	K User	Open	18/06/2019	20/06/2019		

On the right, the 'Associated Records' panel shows a list of records:

Date	Record	Type	Notes	Actions
20/06/2019	Task	Appointment	Home visit	
24/04/2019	Assessment [Wellbeing Domains]	Initial		
15/03/2019	Note	Home visit	Visited the family home. A very positive discussion about the challenges they were currently experiencing and the background to how they came to be here. Obtained consent to engage with our service.	
06/03/2019	Note	Phone	Contacted Felicity to introduce our service and how we may be able to support her family. Arranged for our initial visit next Friday.	
05/03/2019	Note	File Note	Rec'd referral and created Case Summary	

→ Use **Filter** to refine the criteria for the records you are looking for. Select the record type, enter specific date range if relevant, click Search.

The screenshot shows the 'Associated Records' filter section with the following fields:

- Filter** (button, circled in red)
- Create New** (button)
- From:** DD/MM/YYYY (calendar icon)
- To:** DD/MM/YYYY (calendar icon)
- Record:** Please select... (dropdown menu)
- Search** (button, circled in red)
- Clear** (button)

→ The **Create New** button on the **Associated Records** short-cut enables you to create a new record for the types relevant to your service.

The screenshot shows the 'Associated Records' panel with the 'Create New' dropdown menu open. The dropdown menu items are:

- Note
- Support
- Alert
- Task
- Assessment**
- Wellbeing Domains
- Document

The **Cases** Page provides many efficiencies for managing and monitoring Cases within your service.

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