

Youth Support

YSCIS User Manual for Youth Support Services

December 2018

Purpose of this document

This User Manual provides users within funded service organisations with information on how to access and use YSCIS.

YSCIS is based on the Infoxchange SRS product. Guidance for functionality which has not been specifically tailored for YSCIS is supported by Online Help accessed from within YSCIS.

For matters of practice, please refer to the following resources available at

<https://www.csyw.qld.gov.au/youth/youth-support-services>

- » The Practice Guide for Youth Support Services
- » The Youth Wellbeing Assessment Common Assessment Tool and
- » The Youth Support Frequently Asked Questions

You may also email any queries to YouthInvest@csyw.qld.gov.au

ANONYMITY OF CLIENT DATA

The screenshots displayed in this document are taken from a test or training environment, using fictitious data.

Within the live production environment, YSCIS is managed through Infoxchange with DCSYW (Department of Child Safety, Youth and Women) only receiving reports on de-identified data.

DISCLAIMER

This User Manual reflects the functionality of the system as at December 2018. As enhancements and updates are made to the Youth Client Information Management System (YSCIS), the content of screens and functionality may differ from that represented in this document.

The State of Queensland (Department of Child Safety, Youth and Women) 2018

www.csyw.qld.gov.au

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Attribution

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1 About YSCIS

Youth Support Client Information System (YSCIS) is the online client management system developed in partnership with Infoxchange, and funded by the Department of Child Safety, Youth and Women to support service delivery by Youth Support services. YSCIS integrates tools and performance reporting to streamline the capture of reliable data for managing service delivery and evaluating the outcomes achieved for young persons.

To access YSCIS you will need:

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

1.1 Logging into YSCIS

1. Type the URL <https://srs-qld-youth.infoxchangeapps.net.au> into the browser. The landing page, as below, will appear.

2. Login using your unique username and password.

Certain parameters need to be completed when you log in for the first time. These are detailed in the section [Logging in for the first time](#).

- » You have 4 attempts to enter the correct username and password. On a 5th unsuccessful attempt, your user account will be blocked for about an hour. Your Coordinator (or the Infoxchange HelpDesk) can re-set your account.
- » User accounts are also blocked if you have not logged in for 6 weeks or more.
- » YSCIS Coordinators can reset passwords and unblock blocked users.

3. The **News** section will keep you informed of any updates for the Youth Support Program Team and any software updates.

4. Details of support options are listed under the '**Need help using YSCIS?**' heading.

<https://srs-qld-youth.infoxchangeapps.net.au/home.php>

Youth Support

Infoxchange

Youth Support Client Information System

This database contains private and confidential information. Access to this information is subject to State and Federal 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 YSCIS

Youth Support Client Information System (YSCIS) 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 Youth Support services in Queensland.

YSCIS improves the efficiency and effectiveness of service delivery by helping organisations manage information and activities for young people supported through Youth Support service providers.

Access to YSCIS is managed through Infoxchange with DCSYW only receiving reports on de-identified data.

Access to YSCIS is provided solely to authorised users.

By logging on to this application you accept the YSCIS Conditions of Use and you affirm that you understand that penalties may apply for misuse of YSCIS and information it contains.

News

YSCIS to YSCIS service automatic referrals

Recent enhancements now enable automatic referrals with the following services:

- Brisbane Youth Service (BYS)
- Youth and Family Services (YFS)
- Youth Empowered to Independence (YETI)

Manual processes are **no longer** required to effect referrals within these services.

For the latest news including updates on recent releases go to [News](#).

Need help using YSCIS?

If you experience any problems with this application please contact Infoxchange Helpline on **1300 360 616** or **(03) 9418 7487** or email srs-support@infoxchange.org.

If you contact support please quote the web address you use to access the application and the workgroup that you belong to.

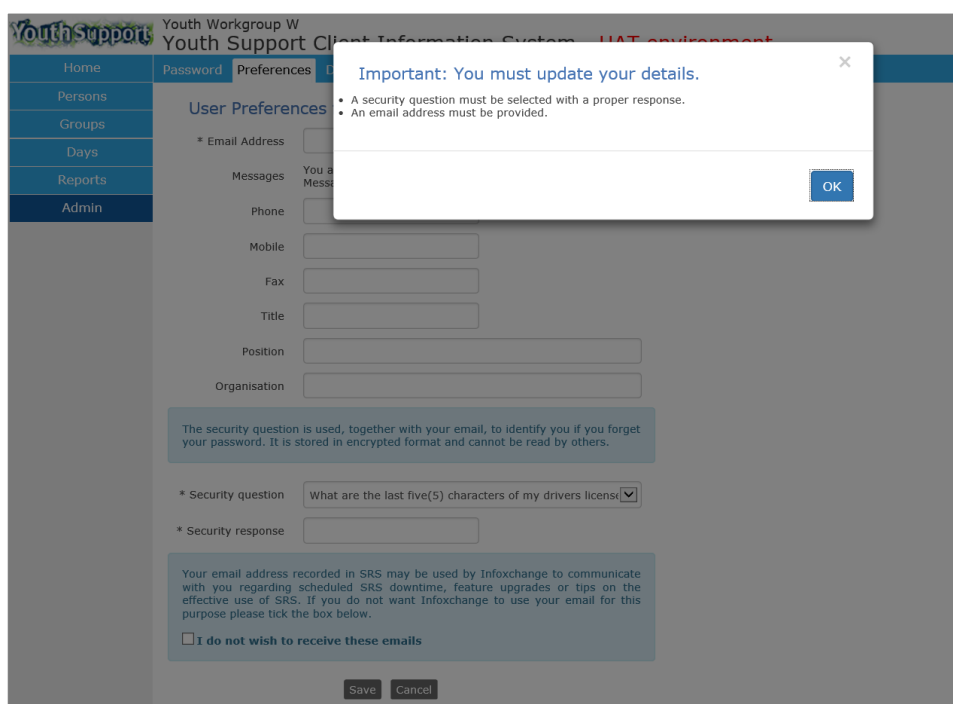
If you have practice related questions please review the [Youth Support Practice Guide and Frequently Asked Questions](#). If you require further clarification, please contact your regional contract manager or email CYP.Support@dcsw.qld.gov.au.

1.2 Logging in for the first time

When you log in for the first time, you may be asked to change your password. This is located on the **Admin Page, Password** tab. We recommend that you change your password to something easy to remember. Refer to section [Change Password](#) for more information.

- » Your YSCIS Coordinator will set you up with a username and a password to enable you to access YSCIS.
- » Username must be unique within YSCIS.
Recommend Firstname.Surname (e.g. John.Dough)
- » Passwords must be a minimum of 10 characters and contain 1 upper case letter, 1 lower case letter, a number and a special character.

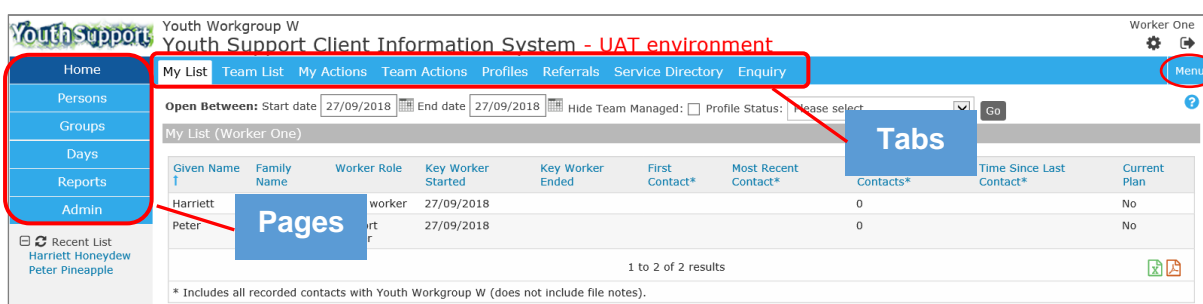
When logging in the first time, you will also be asked to update your security questions and email address – located on the **Admin Page, Preferences** tab.



This information helps to identify you within the system. **You will be prompted to update these preferences each time you login until you complete these items.**

1.3 Navigating YSCIS

Once you have logged into YSCIS, the **Home** Page, **My List** tab displays as the default.




Each screen is made up of 3 areas:

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

Pages are grouped according to theme:

Home:	Range of worker tools + Enquiry form
Persons:	Search for clients and manage client records
Groups:	Manage data related to work with groups of clients
Days:	Enter or view data related to a particular day/date
Reports:	Request, generate and view reports
Admin:	User preferences, documents and YSCIS Coordinator functions.

Each page has multiple Tabs. Tabs allow the user to carry out particular functions within the selected page. The Menu icon  also contains the list of Tabs for each Page.

Within your YSCIS workgroup, users are assigned an access profile of **Coordinator** or **Normal** user.

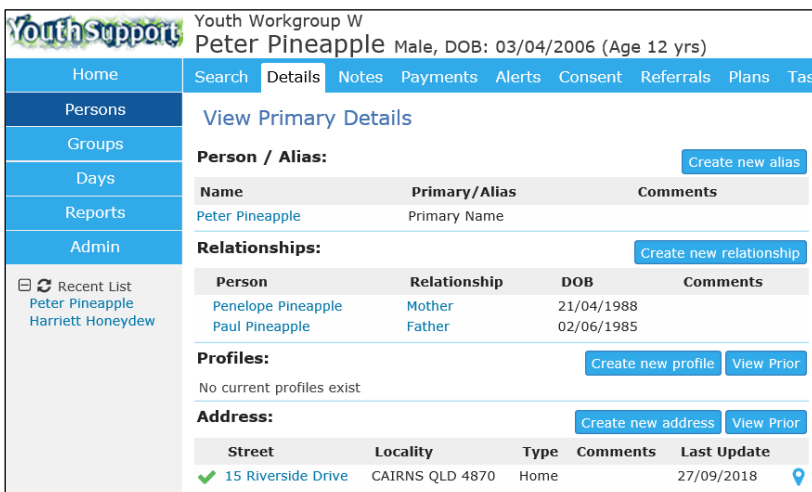
Please note: Some tabs and fields within various templates are only available to those users with **Coordinator** access profile.

1.4 Viewing Prior Records

Data in YSCIS should not be deleted unless it was incorrectly entered. If information is no longer current or work has been completed, simply record the date the record stopped being current (e.g. address, contact details) or was completed (e.g. Profile/Case is closed). This will close the record but not delete it. It will be retained and able to be viewed /accessed from the **View Prior** button. Simply create a new record to reflect the current / new activity.

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

On the client record below, the **View Prior** button appears for Profiles and Address – indicating there are historical records for both of these.



The screenshot shows the 'Youth Support' system interface. At the top, it says 'Youth Workgroup W' and 'Peter Pineapple Male, DOB: 03/04/2006 (Age 12 yrs)'. Below this is a navigation bar with tabs: Home, Search, Details, Notes, Payments, Alerts, Consent, Referrals, Plans, and Tasks. The 'Details' tab is selected. On the left, there is a sidebar with a 'Recent List' showing 'Peter Pineapple' and 'Harriett Honeydew'. The main content area is titled 'View Primary Details' and contains several sections: 'Person / Alias' with a 'Create new alias' button; a table for 'Person' with columns 'Name', 'Primary/Alias', and 'Comments', showing 'Peter Pineapple' as the 'Primary Name'; 'Relationships' with a 'Create new relationship' button and a table with columns 'Person', 'Relationship', 'DOB', and 'Comments', listing 'Penelope Pineapple' (Mother, DOB 21/04/1988) and 'Paul Pineapple' (Father, DOB 02/06/1985); 'Profiles' with a 'Create new profile' button, a 'View Prior' button, and the text 'No current profiles exist'; and 'Address' with a 'Create new address' button, a 'View Prior' button, and a table with columns 'Street', 'Locality', 'Type', 'Comments', and 'Last Update', showing '15 Riverside Drive', 'CAIRNS QLD 4870', 'Home', and '27/09/2018'.

By clicking on the **View Prior** button, those previous records are displayed for viewing:

Youth Support
Youth Workgroup W
Peter Pineapple Male, DOB: 03/04/2006 (Age 12 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Task

Persons View Primary Details

Groups

Days

Reports

Admin

Recent List
Peter Pineapple
Harriett Honeydew

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

Name	Primary / Alias	Comments
Peter Pineapple	Primary Name	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Penelope Pineapple	Mother	21/04/1988	
Paul Pineapple	Father	02/06/1985	

Profiles: [Create new profile](#) [View Prior](#)

No current profiles exist

Prior profiles

Profile Type	Workgroup	Start	End
Access Case	Youth Workgroup W	05/04/2018	30/05/2018

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

Street	Locality	Type	Comments	Last Update
15 Riverside Drive	CAIRNS QLD 4870	Home		27/09/2018

Prior addresses



Street	Locality	Type	Comments	Last Update
17 Bouncy Road	CAIRNS QLD 4870	Home		27/09/2018

1.5 Toggle for access to Person records

On the left-hand side of your screen, located underneath the Pages, there are 3 toggle options to display recent Person records – for easy access:

- **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.

Youth Support

Home
Persons
Groups
Days
Reports
Admin

Recent List
Marge Simpson
Peter Pineapple
Mary Mushroom
Harriett Honeydew

Youth Support

Home
Persons
Groups
Days
Reports
Admin

My List
Harriett Honeydew
Peter Pineapple

Youth Support

Home
Persons
Groups
Days
Reports
Admin


Team Managed
Marge Simpson

Youth Support

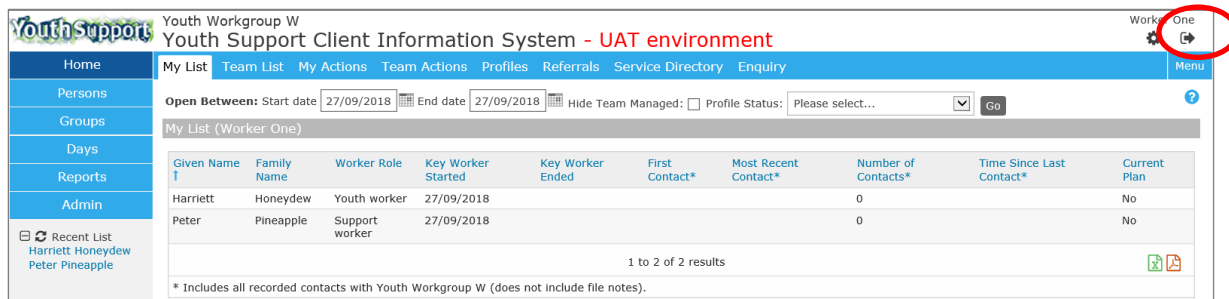
Home
Persons
Groups
Days
Reports
Admin

Recent List

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 YSCIS.



Youth Support Client Information System - UAT environment

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

Open Between: Start date 27/09/2018 End date 27/09/2018 Hide Team Managed: ☐ Profile Status: Please select... Go

My List (Worker One)

Given Name	Family Name	Worker Role	Key Worker Started	Key Worker Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan
Harriett	Honeydew	Youth worker	27/09/2018				0		No
Peter	Pineapple	Support worker	27/09/2018				0		No

1 to 2 of 2 results

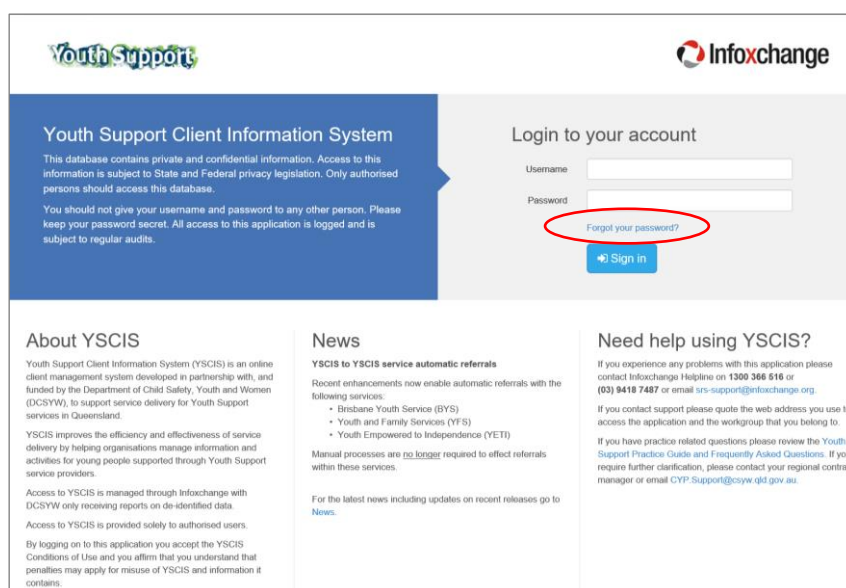
* Includes all recorded contacts with Youth Workgroup W (does not include file notes).

1.7 Forgotten password

After you have logged in for the first time and have completed your **Preferences** (recorded your email address), the 'Forgot your password?' link on the landing page is of great help, if you have forgotten your password.

Note: If you haven't recorded your email address, you will need to contact your YSCIS Coordinator to reset your password.

1. Select **Forgot your password** to reset your password.



Youth Support Client Information System

This database contains private and confidential information. Access to this information is subject to State and Federal 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 YSCIS

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News

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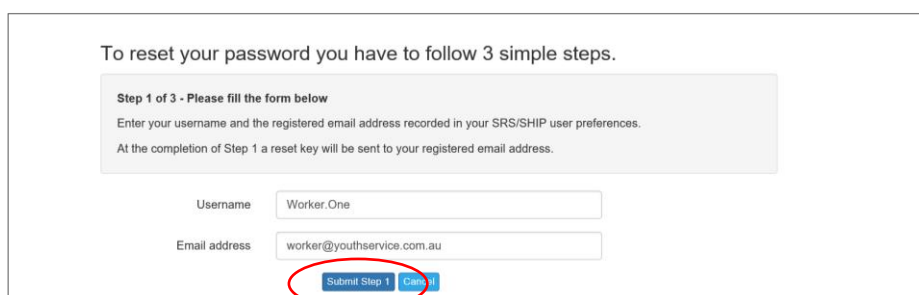
Need help using YSCIS?

If you experience any problems with this application please contact Infoexchange Helpline on 1300 366 516 or (03) 9418 7487 or email srs-support@infoexchange.org.

If you contact support please quote the web address you use to access the application and the workgroup that you belong to.

If you have practice related questions please review the Youth Support Practice Guide and Frequently Asked Questions. If you require further clarification, please contact your regional contract manager or email CYP.Support@csywe.qld.gov.au.

2. Enter your username and the recorded email address registered. Select **Submit Step 1**



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

Step 1 of 3 - Please fill the form below

Enter your username and the registered email address recorded in your SRS/SHIP user preferences.

At the completion of Step 1 a reset key will be sent to your registered email address.

Username

Email address

[Submit Step 1](#) [Cancel](#)

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 and answer the security question. Select **Submit Step 2**

The screenshot shows the 'Youth Support' and 'Infoxchange' logos at the top. Below them, a heading reads 'To reset your password you have to follow 3 simple steps.' A grey box contains instructions for 'Step 2 of 3 - Please fill the form below', stating that an email with a reset key was sent and that the user must enter the key and answer a security question. A note mentions that if there is no security question, the user has not completed their preferences. The form fields are: 'Reset Key' with the value '1304bb16ac', 'Security Question' with the text 'What are the last five(5) characters of my drivers license?', and 'Security Response' with the value '98765'. At the bottom are 'Submit Step 2' and 'Cancel' buttons. Red circles highlight the 'Reset Key' field, the 'Security Response' field, and the 'Submit Step 2' button.

4. Enter your **new** password

Note: Your password must be at least 10 characters long: containing 1 upper case letter, 1 lower case letter, 1 number and 1 special character. Select **Submit Step 3**

The screenshot shows the 'Youth Support' and 'Infoxchange' logos at the top. Below them, a heading reads 'To reset your password you have to follow 3 simple steps.' A grey box contains instructions for 'Step 3 of 3 - Enter your new password', stating that the reset key and security question have been validated and that the user should select a secure password. It lists rules: at least 8 characters, at least 1 upper-case letter, 1 lower-case letter, and 1 number, and that it cannot be the same as the current password. The form fields are: 'New password' and 'Confirm password', both masked with dots. At the bottom are 'Submit Step 3' and 'Cancel' buttons. A red circle highlights the 'Submit Step 3' button.

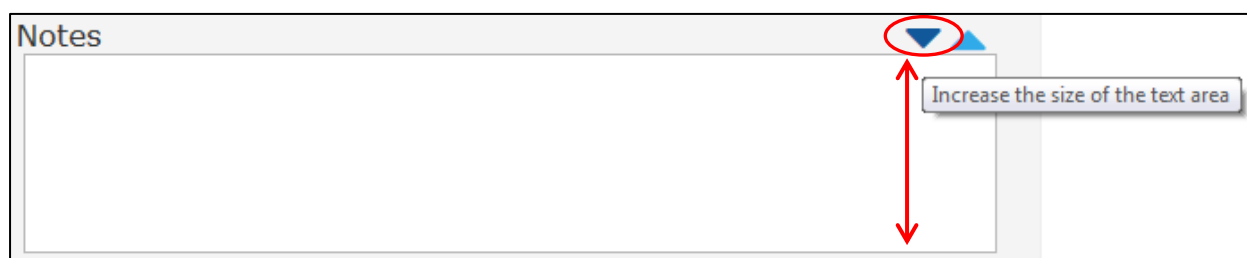
5. The following screen will display. Select **Login Page** and enter your new password to log-in to YSCIS.



1.8 Increasing/Decreasing the size of text fields


Some free text fields are able to expanded and decreased in size. This allows you to view more/less text as desired.

1. To increase the size of a free text field click the ▼ icon to 'push' the bottom of the field down the page hence increasing the amount of space available for text.



1.9 Seeking help for standard SRS features

The information in this User Manual targets functionality specifically tailored for the Youth Support Program. There are several functions, features and terminology that have not changed from the Infoxchange SRS product. For guidance on using these features, use the

Help  icon located in the top right corner of the screen. This will take you to the relevant location on Infoxchange's support site.

Workgroup vs Cluster: You may notice the following wording appearing on certain forms within YSCIS:

May be viewed by ☒ Workgroup ☐ Cluster

The terms Workgroup and Cluster pertain to different structure options within the SRS product. In YSCIS, your service outlet (funded under the Youth Support Program) is established in a 1:1 relationship – each service workgroup is its own workgroup and its own cluster. These buttons do not have any relevance for managing your data.

2 Home Page

This section provides an overview of the various **Tabs** accessed from the **Home** page.

2.1 My List

When you log-in to YSCIS, it opens on the **My List** tab.

The **My List** tab displays clients for whom you have been allocated as a **Key Worker** (from the **Persons** page, **Details** tab).

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

Youth Support Client Information System - UAT environment

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

Open Between: Start date 27/09/2018 End date 27/09/2018 Hide Team Managed: ☐ Profile Status: Please select... Go

My List (Worker One)

Given Name ↑	Family Name	Worker Role	Key Worker Started	Key Worker Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan
Harriett	Honeydew	Youth worker	27/09/2018				0		No
Marge	Simpson	Team Managed	27/09/2018		22/11/2015	22/11/2015	1	2 years 10 mons 5 days	No
Peter	Pineapple	Support worker	27/09/2018				0		No

1 to 3 of 3 results

* Includes all recorded contacts with Youth Workgroup W (does not include file notes).

The following options can be used to customise your view:

- By clicking the calendar icon and altering the Start date and End date, you can filter data by date.
- You can exclude those clients managed by the entire Workgroup by clicking the Hide Team Managed box.
- Using the drop down menu allows you to view clients by a particular Profile Status, which will be displayed once you 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 directs you to the person's record.

2.2 Team List

The **Team List** tab is used to view the list of clients allocated by Key Worker within your Workgroup.

Key Worker	Given Name	Family Name	Worker Role	Key Worker Started	Key Worker Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan
Worker One	Harriett	Honeydew	Youth worker	27/09/2018				0		No
Adrian Board	Person1	Smith		03/11/2015				0		Yes
Worker One	Peter	Pineapple	Support worker	27/09/2018				0		No
Athan Dres	Test	Vanessa		29/06/2018				0		No
Anne Scott	Anne	Test		27/04/2017		21/02/2017	01/06/2017	5	1 year 3 mons 26 days	Yes

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 directs you to the person's 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.

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.

Due Date	Time	Action Type	Workgroup	Person	Description	Details
09/10/2018		Task	Youth Workgroup W	Peter Pineapple	Internal case review	Go to Task
28/09/2018		Task	Youth Workgroup W	Peter Pineapple	Social engagement check-in	Go to Task
26/07/2018		Task	Youth Workgroup W	Marge Simpson	Review required to consider planning for next support phase	Go to Task

The following options can be used to customise your view:

- The default setting 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 blue Person's name directs you to the person's 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 that have been allocated to workers within your workgroup.

Youth Support Client Information System - UAT environment

Worker One

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

Due Date Between: Start date 02/08/2018 End date 25/10/2018 Go Calendar View ?

My Team Tasks

Due Date ↓	Time	Action Type	Worker	Person	Description	Details
09/10/2018		Task	Worker Two Worker One	Peter Pineapple	Internal case review	Go to Task
28/09/2018		Consent Review	Kerry Fortescue	Margerie Mango		Go to Consent
28/09/2018		Consent Review	Aengus Copeland	Bart Simpson		Go to Consent
28/09/2018		Task	Worker One	Peter Pineapple	Social engagement check-in	Go to Task
18/09/2018		Consent Review	Aengus Copeland	Amy Deans		Go to Consent

1 to 5 of 5 results

Data can be viewed with the same options as available on the **My Actions** tab.

2.5 Profiles

The **Profiles** tab on the **Home** page lists is very helpful in enabling you to identify Cases/profiles that are Current, Opened or Closed for specified date ranges.

Youth Support Client Information System - UAT environment

Worker Two (Coordinator)

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

Please select...
Access Case
Integrated Response Case
Support Case
Support - Case management

Select: Current between 01/12/2018 and 19/12/2018 Go

Show: Last worker: Alerts: Only this workgroup: ☒ Go

Profiles

Given Name	Family Name	Profile Started	Profile Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan
Angus	Young	16/10/2018				0		No
Ann	Mallarme	15/10/2018		12/10/2016	02/11/2016	2	2 years 1 mon 17 days	No
Athan	Athan	16/10/2018				0		No
Barry	Beetroot	02/10/2018		02/10/2018	02/10/2018	1	2 mons 17 days	Yes

Select your required Case/Profile type, then select Current, Opened or Closed from the drop-down list and specify the date range required. Click **Go**.

The following options can be used to customise your view:

- Profile information can be filtered by profile type and profile status:
- By clicking the calendar icon and altering the Start date and End date, you can filter data by date.
- You can also display Last worker and Alerts information by clicking these fields.
- You can limit the profiles to only those within the current workgroup by selecting Only this workgroup.
- To sort the list of profiles, click on the Given Name, Family Name or Profile Started blue column headings.
- Click Export List to export the profile data currently displayed to a Microsoft Excel spreadsheet or pdf.
- Clicking on the blue person's name directs you to the person's record.

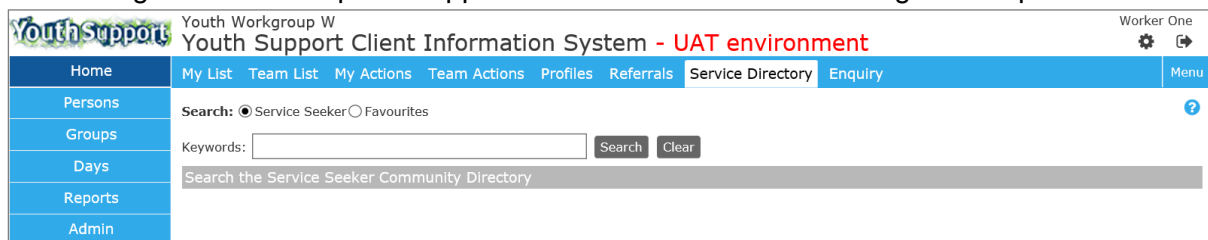
2.6 Referrals


This tab is used to manage referrals received from other Youth Support services and provides a central list of referrals recorded for your clients (i.e. sent to other services – within and external to the Youth Support Program).

For specific guidance regarding the **Referrals** tab, refer to [Chapter 10 Referrals](#)

2.7 Service Directory

The **Service Directory** tab accesses the Service Seeker directory maintained by Infoxchange. This is a separate application external to YSCIS. Using this is optional.



If you have any questions regarding the Service Seeker database, click the Help  icon or contact the Infoxchange Help Desk.

2.8 Enquiry

For guidance regarding the **Enquiry** tab, refer to [Chapter 13 Enquiries](#)

3 Persons Records

3.1 Searching for a Person

- » Within YSCIS, a 'person' includes clients or person related to a client
- » 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 done a search to ensure the client doesn't already exist in your workgroup.

You can search for a person in 2 places:

1. via the **Persons** page and using the **Search** tab. Using the search tab allows you to enter the first name, surname and gender of the client.
2. using the **Family Name** search box on the bottom left of the screen;

Youth Support Client Information System - UAT environment

Search By: ☒ Name ☐ Identifier ☐ Phone

Given name: M% Family name: Man% ☐ Male ☐ Female ☒ Fuzzy

Given Name	Family Name	Sex	DOB	Alias?	Match ↑
Margerie	Mango	Female	21/04/2000		9

1 to 1 of 1 results

Family name search:

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 select 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, Family name "%son" will return a list of all persons whose surname ends with 'son'.

Some example wildcard searches include:

- » W* or W% will search for names starting with "W"

3.2 Add a Person

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

Youth Support Client Information System - UAT environment

Search By: ☒ Name ☐ Identifier ☐ Phone

Given name Family name ☐ Male ☐ Female ☒ Fuzz

Search Results
No matches to your search.

Add new Person

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.

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

Click **Add new Person** to create a record.

NOTE:

Warning

You have not completed the Date of Birth question. Please complete ASAP.

Warning

You must record a valid Consent record for this client.

Throughout the steps to create a Person record, a warning message/s will display advising that Date of birth and Consent are required to be recorded. These will continue to display until the consent on the **Persons** page, **Consent** tab and *Date of birth* on the **Persons** page, **Details** tab, **Edit Primary Details** form, are recorded.

2. Enter as much information about the client as possible. Sex and Date of Birth are mandatory fields (*). If the exact date of birth is unknown, the user can enter a year and tick the 'year estimated' box.

Add New Person

Given Name

Middle Name

Family Name

*Sex ☒ Male ☐ Female

Identifies as gender

* Date of Birth
☐ year estimated

Identifies as ☐ Aboriginal
☐ Torres Strait Islander
☐ Both
☒ Neither

Identifies as ☐ Australian South Sea Islander

Country of birth

Language at home


☐ Culturally and Linguistically Diverse

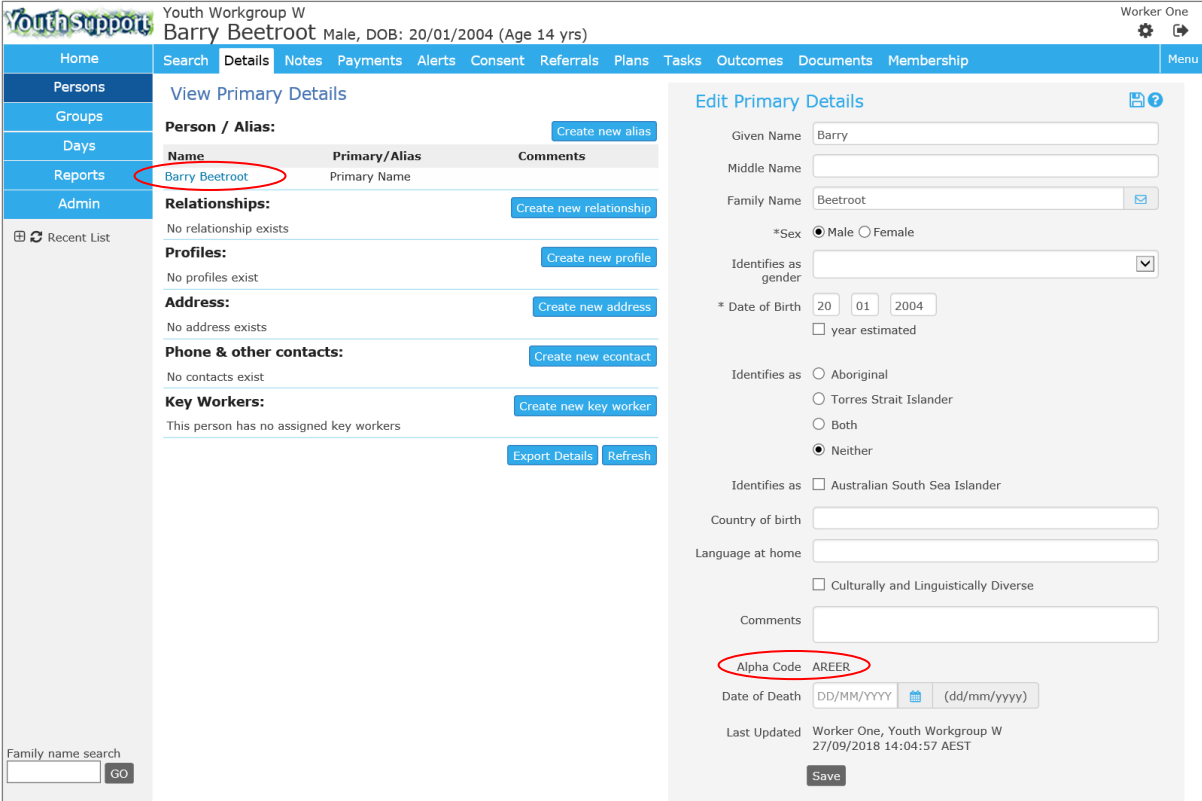
Comments

Alpha Code

Date of Death

Last Updated

3. Click **Save** or select the  icon in the top right of the form.
4. The Person record is created – the **Details** tab is the default view.
It can be edited at any time by updating the details and clicking **Save**.



YouthSupport Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Worker One

Home Search **Details** Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

View Primary Details

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

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	

Relationships: [Create new relationship](#)

No relationship exists

Profiles: [Create new profile](#)

No profiles exist

Address: [Create new address](#)

No address exists

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

No contacts exist

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

This person has no assigned key workers

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

Family name search [GO](#)

Edit Primary Details [Print](#) [Help](#)

Given Name

Middle Name

Family Name [Email](#)

*Sex ☒ Male ☐ Female

Identifies as gender

* Date of Birth
☐ year estimated

Identifies as ☐ Aboriginal
☐ Torres Strait Islander
☐ Both
☒ Neither

Identifies as ☐ Australian South Sea Islander

Country of birth

Language at home
☐ Culturally and Linguistically Diverse

Comments

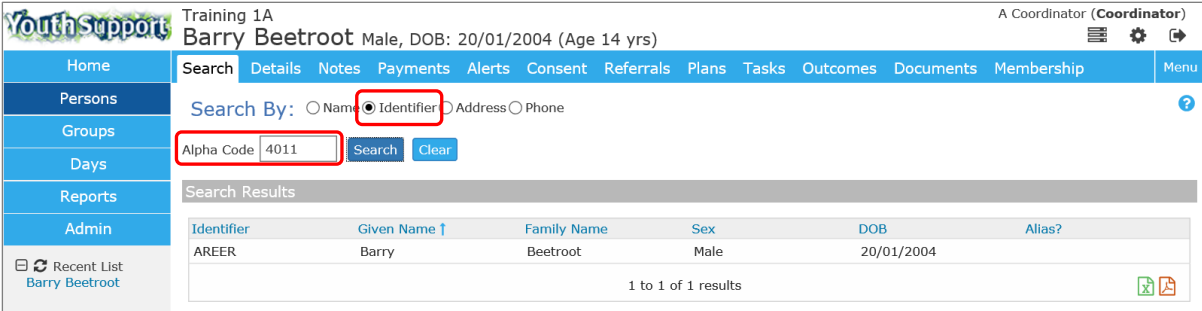
Alpha Code

Date of Death

Last Updated Worker One, Youth Workgroup W
27/09/2018 14:04:57 AEST

[Save](#)

YSCIS auto-assigns an Alpha Code and an ID number (visible by hovering over the blue Person name) to each Person record. These identifiers can be used in the *Identifier* Search option (both codes can be entered into the Alpha Code field) and may display in some Lists.



YouthSupport Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

A Coordinator (Coordinator)

Home Search **Details** Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

Search By: ☐ Name ☒ Identifier ☐ Address ☐ Phone

Alpha Code [Search](#) [Clear](#)

Search Results

Identifier	Given Name ↑	Family Name	Sex	DOB	Alias?
AREER	Barry	Beetroot	Male	20/01/2004	

1 to 1 of 1 results

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

3.3 Create Alias

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

The screenshot shows the 'Youth Support' interface for 'Youth Workgroup W' and 'Barry Beetroot' (Male, DOB: 20/01/2004, Age 14 yrs). The 'Details' tab is active. On the left sidebar, 'Persons' is selected. The main content area shows 'View Primary Details' for Barry Beetroot. A table lists 'Person / Alias' with columns 'Name', 'Primary/Alias', and 'Comments'. The 'Create new alias' button is circled in red. To the right, the 'Add New Alias' form is visible, with fields for 'Given Name', 'Middle Name', 'Family Name', 'Preferred Name', '*Sex' (Male/Female), and 'Comments'. A 'Save' button is at the bottom of the form.

2. Record relevant details in the **Add New Alias** form. Click **Save**.
Note: Sex must be recorded for an Alias to assist in searching.

The screenshot shows the 'Youth Support' interface for 'Youth Workgroup W' and 'Barry Beetroot' (Male, DOB: 20/01/2004, Age 14 yrs). The 'Details' tab is active. On the left sidebar, 'Persons' is selected. The main content area shows 'View Primary Details' for Barry Beetroot. A table lists 'Person / Alias' with columns 'Name', 'Primary/Alias', and 'Comments'. The 'Baz' alias is highlighted in the table. To the right, the 'Edit Alias Details' form is visible, with fields for 'Given Name' (Baz), 'Middle Name', 'Family Name', 'Preferred Name' (checked), '*Sex' (Male/Female), and 'Comments'. A 'Save' button is at the bottom of the form.

3. Details for the Alias can be updated at any time. To access the **Edit Alias Details** record, simply click on the **blue** Alias name.

3.4 Record Relationships

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

Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Worker One

Home Search **Details** Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

Persons View Primary Details

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

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: [Create new relationship](#)

No relationship exists

Profiles: [Create new profile](#)

No profiles exist

Search for related person:

Given name

Family name

Sex ☐ Male ☐ Female

Fuzzy ☒

Go Clear

Results

- Search for the related person – using % is recommended.
If a record for the person is not found, select **Add new person**

Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Worker One

Home Search **Details** Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

Persons View Primary Details

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

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: [Create new relationship](#)

No relationship exists

Profiles: [Create new profile](#)

No profiles exist

Address: [Create new address](#)

No address exists

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

No contacts exist

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

This person has no assigned key workers

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

Search for related person:

Given name

Family name

Sex ☐ Male ☐ Female

Fuzzy ☒

Go Clear

Results

First Name	Last Name	Gender	DOB	Alias?	Match
Barry	Beetroot	male	20/01/2004	4	

[Add new person](#)

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

Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Worker One

Home Search **Details** Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

Persons View Primary Details

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

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: [Create new relationship](#)

No relationship exists

Profiles: [Create new profile](#)

No profiles exist

Address: [Create new address](#)

No address exists

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

No contacts exist

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

This person has no assigned key workers

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

Edit Relationship

Related person Barbie Beetroot

is Barry Beetroot's

Start Date

End Date

Comments

Last update

[Print View](#)

Relationship dropdown:

- Friend
- Friend - care recipient
- Friend - volunteer carer
- Grandchild
- Grandparent
- Great Aunt
- Great Niece
- Guardian
- Half Sister
- House mate
- Kinship Carer
- Kinship Child
- Kith
- Mother
- Mother in Law
- Niece
- Parent
- Partner
- Relation
- Sibling
- Sister
- Sister in Law
- Spiritual Guidance
- Spouse
- Step Aunt
- Step-child
- Step Grandchild
- Step Grandparent
- Step-parent
- Step-Sister

Note: The start date for the relationship may be the client's Date of Birth or it could be the start date of care (e.g. foster care). This field is not mandatory.

A Person record has now been created for that Person. They have been 'connected' with that Person via the displayed relationship. You can access that Person record simply by clicking on their name.

- To modify the Relationship, click on the **Relationship** value- the Edit screen will display on the right hand side. Update the details and select **Save**.

Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

Persons View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Bert Beetroot	Father	02/06/1990	
Barbie Beetroot	Mother	21/01/1988	

Profiles: Create new profile

No profiles exist

Edit Relationship

Related person Barbie Beetroot

Is Barry Beetroot's Mother

Start Date 28/09/2018

End Date dd/mm/yyyy

Comments

Last update Worker One 28/09/2018 09:52:12 AEST

Save

Print View

- To cease a relationship, enter an **End Date**.
Users with Coordinator access are able to **Delete** a Relationship record if required.

3.5 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.

- Select **Create new address** and the **New Address Details** form will appear to the right of screen.

Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

Persons View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Bert Beetroot	Father	02/06/1990	
Barbie Beetroot	Mother	21/01/1988	

Profiles: Create new profile

No profiles exist

Address: Create new address

No address exists

Phone & other contacts: Create new econtact

No contacts exist

Key Workers: Create new key worker

This person has no assigned key workers

Export Details Refresh

New Address Details:

Street

Suburb

State QLD

Postcode

Country Australia

Comments

Safety Issues

Address type Home

Primary Address? Yes No



Current Address? Yes No

Others who live at this address(tick):

Person	Relationship	Current Address	Address Type	Primary Address
Barbie Beetroot	Mother			
Bert Beetroot	Father			

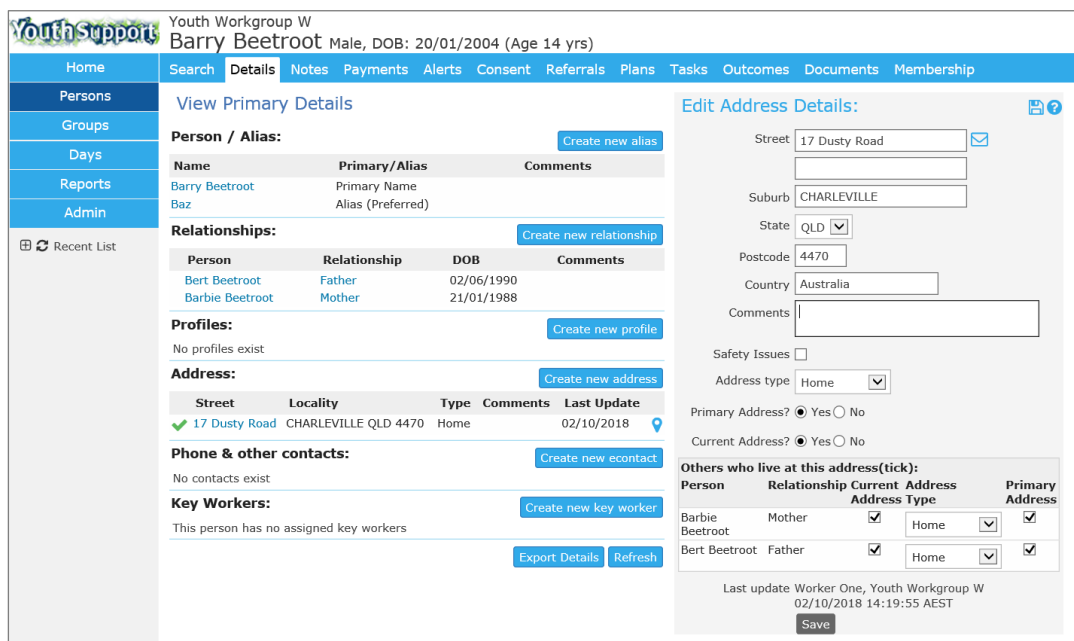
Last update

Save

2. Enter the address details
3. Select the envelope icon  if you wish to make the address 'Care Of' somebody other than the client
4. Select the Address type
5. Update the Primary and Current address status (Yes/No)
6. Record other people with relationships to the client that are living at the same address by ticking the **checkbox** at the bottom of the New Address Details form. Note this will be identified by persons related to the client. Ticking these boxes automatically updates the address of the person/s whom you ticked.
7. Select **Save**
8. To edit the address, select the **blue text** of the address which will reopen the Edit Address Details page. To view address in google maps, select the  icon

Additional Notes:

- » When you start typing the **Suburb**, a list of possible options will appear.
- » **State** and **Postcode** will be populated automatically, assuming the **Suburb** is recognised.
- » When a **Primary Address** has been entered and you click on **Create new address**, the application will prompt you to identify whether you are entering a new **Primary Address**
- » Only addresses marked as **current** are displayed
- » To close an address tick 'No' in the Current Address field
- » To view non-current addresses, select **View Prior**
- » The Primary Address is identified by a **green tick** in the list of addresses as per the following screen shot.



Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons View Primary Details

Groups

Days

Reports

Admin

Recent List

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

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Bert Beetroot	Father	02/06/1990	
Barbie Beetroot	Mother	21/01/1988	

Profiles: [Create new profile](#)

No profiles exist

Address: [Create new address](#)

Street	Locality	Type	Comments	Last Update
✓ 17 Dusty Road	CHARLEVILLE QLD 4470	Home		02/10/2018

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


No contacts exist

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

This person has no assigned key workers

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

Edit Address Details: [Print](#) [Help](#)

Street: 17 Dusty Road 

Suburb: CHARLEVILLE

State: QLD

Postcode: 4470

Country: Australia

Comments:

Safety Issues: ☐

Address type: Home

Primary Address? ☒ Yes ☐ No

Current Address? ☒ Yes ☐ No

Others who live at this address(tick):

Person	Relationship	Current	Address Type	Primary Address
Barbie Beetroot	Mother	<input checked="" type="checkbox"/>	Home	<input checked="" type="checkbox"/>
Bert Beetroot	Father	<input checked="" type="checkbox"/>	Home	<input checked="" type="checkbox"/>

Last update Worker One, Youth Workgroup W
02/10/2018 14:19:55 AEST

[Save](#)

3.6 Record Phone & other contacts (email, facebook etc)

A Person can have multiple electronic contact records such as phone, email, fax, facebook 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** and the **Edit Contact Details** form will appear to the right of screen.

Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons View Primary Details

Groups

Days

Reports

Admin

Recent List

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

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: [Create new relationship](#)

Person	Relationship	DOB	Comments
Bert Beetroot	Father	02/06/1990	
Barbie Beetroot	Mother	21/01/1988	

Profiles: [Create new profile](#)

No profiles exist

Address: [Create new address](#)

Street	Locality	Type	Comments	Last Update
17 Dusty Road	CHARLEVILLE QLD 4470	Home		02/10/2018

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

No contacts exist

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

This person has no assigned key workers

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

Edit Contact Details:

*Contact

*Contact type
Phone (Hm)
Phone (Wk)
Mobile
Email
Fax
Skype
Other
Associated person
Emergency Contact
Facebook

Safety Issues

Comments

Start Date

End Date

Current econtact? ☒ Yes ☐ No

Last update

[Save](#)

2. Enter the **Contact** details. This may be the telephone number, email address, facebook address etc.
3. Select a **Contact type** by clicking the drop down menu.
4. Add **Comments** as required.
5. Enter the **Start Date** by using the calendar icon.
6. If this is the current contact for the client set **Current econtact?** To Yes
7. Select **Save**.
8. 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.
9. To cease a contact, enter an **End Date**.

Additional Notes:

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

3.7 Assign Key Workers

A Person can have one or more Key Workers recorded.

Key workers can be members of your service involved with this client or other people, external to your service, who assist the client. Where a member of your service is recorded as a Key Worker, this Person will display on their **My List** tab on the **Home** page.

Where no particular Person within your service is assigned to a client, Persons can also be identified as being **Team Managed**. This Person will display on My List for all workers within your service.

When you record 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** and the **Edit Key Worker** form will appear to the right of screen.
2. Select the **Key Worker** from the drop-down list.

The screenshot shows the 'Youth Support' system interface. The top navigation bar includes 'Home', 'Persons', 'Groups', 'Days', 'Reports', and 'Admin'. The main content area is titled 'View Primary Details' for 'Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)'. The 'Edit Key Worker' form is visible on the right, with a dropdown menu for 'Key Worker' set to 'Worker One'. The 'Create new key worker' button is circled in red.

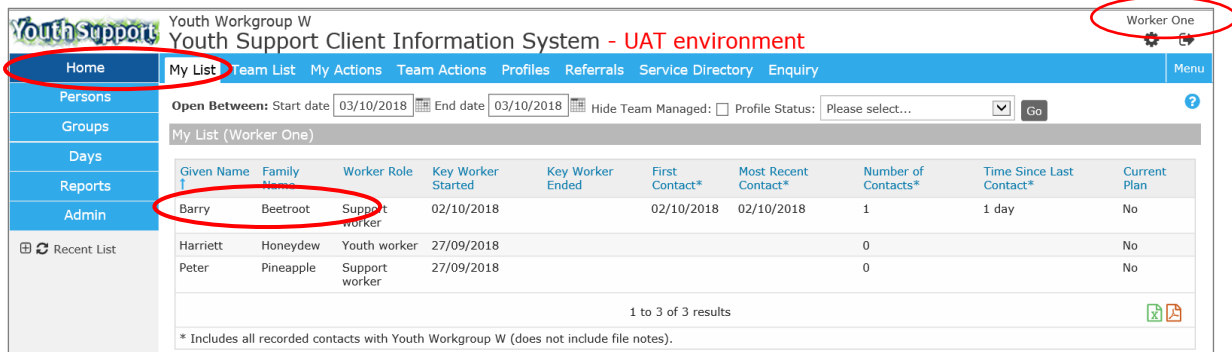
3. To create a key worker record for an external person, select '**Other, please specify:**' from the **Key Worker** list. You will then be able to enter their name.

Key Workers:			
			Create new key worker
Worker	Workgroup	Role	Comments
Trevor	HeadSpace	Counsellor	0455 669 889
Worker One	Youth Workgroup W	Support worker	

4. Select **Team Managed** if the person is managed by the whole workgroup and not assigned to any individual worker
5. Add **Role** and **Comments** as required.
6. **May be viewed by** – there is no difference between these options for workgroups within YSCIS. Only users set-up within your workgroup can view your records.

7. Enter the **Start Date** by using the calendar icon.
8. If this is the current Key Worker for the client set **Current Key Worker?** to Yes
9. Select **Save**. To modify the Key Worker click on the **Key Worker** and the edit screen will display on the right hand side. Update the details and select **Save**. To cease a Key Worker enter an **End Date**.

When you are recorded as a **Key Worker** on a Person record, it will display on the **My List** and **Team List** tabs on the **Home** page:



Youth Support Client Information System - UAT environment

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

Open Between: Start date 03/10/2018 End date 03/10/2018 Hide Team Managed: ☐ Profile Status: Please select... Go

My List (Worker One)

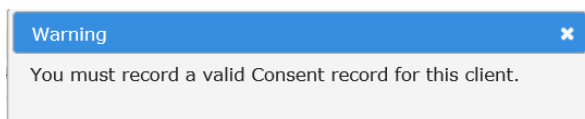
Given Name	Family Name	Worker Role	Key Worker Started	Key Worker Ended	First Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan
Barry	Beetroot	Support worker	02/10/2018		02/10/2018	02/10/2018	1	1 day	No
Harriett	Honeydew	Youth worker	27/09/2018				0		No
Peter	Pineapple	Support worker	27/09/2018				0		No

1 to 3 of 3 results

* Includes all recorded contacts with Youth Workgroup W (does not include file notes).

4 Add Consent

Consent is mandatory. As soon as you add a Person record, a warning message will pop up 'You must record a valid Consent record for this client'. This message will continue to appear until a consent record is added. Each person recorded in YSCIS must have a consent record, for example, a parent of a client.



It is possible to have multiple consents current in a client's file. Organisations may ask clients for additional consent, for example, travelling in a work vehicle. If organisations have their own consent form, it can be uploaded and added to the record on this page.

Consent should be reviewed regularly with clients and it is compulsory to enter a review date.

Verbal consent can be recorded in the **Notes** free text box at the end of the form. Once a Consent Form has been saved, a new Consent Form can be generated with the existing pre-populated information, except for the signature.

1. From the **Person** page, select the **Consent** tab
2. Select **Create New Consent**

The screenshot shows the 'Youth Support' system interface for a client named Barry Beetroot. The 'Consent' tab is selected in the top navigation bar. In the left sidebar, the 'Consents' section is active, and the 'Create New Consent' button is circled in red. The main content area displays the 'Edit Consent Details' form, which includes fields for 'Start date', 'Review date', and 'End Date'. Below these fields are several checkboxes for consent acknowledgment, such as 'I acknowledge that the organisation has advised me about...' and 'I understand that the organisation may need to collect and disclose personal information...'. There are also text boxes for 'This consent relates to the following specific personal information or type of information:' and 'I consent to my personal information being:'. The bottom of the form has a 'Family name search' field and a 'GO' button.

3. Enter **Start** date and **Review date** of consent.

Note: **Review date** is mandatory and it is recommended that consent is reviewed every 3 months. The review will appear on the **My Actions** tab (on the **Home** page) for that worker.

4. Click the checkboxes as appropriate and record consent details in the text boxes provided. Alternatively, organisations may choose to upload their own consent form, if this is the case move to step 5. *Some examples of text to put in the consent text boxes are listed below.*

Example text for consent

This consent relates to the following specific personal information or type of information:

- » My health, including mental health and my accommodation situation and needs
- » Anything that is necessary to assist me access accommodation and re-enrol in education
- » My involvement in the legal system, including court dates
- » Information that assists ABC Service to ensure that all agencies involved in my case plan are kept up to date about my day to day situation


I consent to the stated information being discussed with/released to the following individuals:

- » All information stated with CYMHS, my mother and just my accommodation needs with accommodation providers
- » Potential education and accommodation providers
- » Youth justice, the Youth Advocacy Centre and my mother
- » All agencies that are providing me support/services including Youth Justice, Child Safety and ABC Service

Notes:

- » This information will be reviewed when my case plan is updated or changes
- » I do not consent to any information being shared with anyone in my family other than my parents
- » Consent was provided verbally over the phone

5. Select **Save**

6. Use the triangles  to increase or decrease the size of the **Notes** field

The Consent form can now be printed for your client to sign by selecting **Print View**, then printing.

Note: This feature requires **ALL** boxes/field to be completed. If it is relevant for the boxes/fields to only be partially completed, you will need to complete a manual form and attach it. An example blank consent form can be found on the Admin page under the Documents tab.

7. The scanned copy of the consent form can then be scanned and uploaded by selecting the Select & Upload button. If working from a tablet or mobile device, the client can sign consent on-screen using a stylus pen or their finger
8. Once signed and/ or documents uploaded select **Save**.
9. To **End Date** consent select consent from the list, this will open the edit consent screen, enter an End Date and select save.
10. To **modify an existing consent** (to update) select consent from the list, this will open the edit consent screen and select the **Save New** button. This will copy the existing consent (excluding signature and documents attached) and create a new consent record.

Example for illustrative purposes only:

Edit Consent Details

* Worker/s
A Coordinator, Training 1A

Start date
14/12/2018

Review date
31/01/2018

End Date

I acknowledge that the organisation has advised me about:

- ☒ some information will be recorded about me so that a service can be provided
- ☒ I have the right to privacy and confidentiality
- ☒ I can ask to see the personal information recorded about me
- ☒ information will not be shared with others without my consent (except for duty of care reasons or under relevant legislation, as explained to me)
- ☒ I can withdraw my consent at any time
- ☒ I understand that non-identifying information will be provided to Department of Communities, Child Safety and Disability Services for research, reporting and statistical purposes only. Non-identifying information means that your personal details are not provided.

I understand that the organisation may need to collect and disclose personal information to third parties in order to provide me support. I nominate that my personal information be disclosed only to the person/s or agencies listed below.

This consent relates to the following specific personal information or type of information:

I consent to the stated personal information being:

discussed with/released to the following organisations &/or individuals

released to/discussed with the nominated organisations or persons for the following purpose/s

I am aware that I may withdraw this consent, or part of it, at any time by telling (agency) that I do not consent to further releases of information about me

Signature
Clear

Scanned copy
Select & Upload
(Max File Size: 5 MB)

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

Notes

Last update A Coordinator, Training 1A
14/12/2018 08:13:16 AEST

Save Delete Save New

Print View

5 Case Profiles

5.1 Create a Case Profile

In YSCIS, Cases are recorded as **Profiles** - on the **Persons** page, Details tab. Profiles should be created to match the service provided: *Access* or *Support – Case management*.

All notes, payments, plans and Assessments for a client are linked to a case/profile. A client should only have one active case at a time. Cases are closed at the time your work with your client is complete.

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

Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons View Primary Details Create new profile

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	
Baz	Alias (Preferred)	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Bert Beetroot	Father	02/06/1990	
Barbie Beetroot	Mother	21/01/1988	

Profiles: No profiles exist Create new profile

Address: Create new address

Street	Locality	Type	Comments	Last Update
17 Dusty Road	CHARLEVILLE QLD 4470	Home		02/10/2018

Phone & other contacts: Create new econtact

Contact	Type	Comments	Last Update
0412 556 889	Mobile	Send sms / text message after 5pm.	02/10/2018

Key Workers: Create new key worker

Worker	Workgroup	Role	Comments
Trevor	HeadSpace	Counsellor	0455 669 889
Worker One	Youth Workgroup W	Support worker	

Export Details Refresh

2. Select the **Profile type** from the list and click **Create**

Create new profile

Profile type: Support - Case management

Create

The Case form appears. It comprises of 3 sub-tabs: **Service User**, **Referral** and **Closure**.

3. On the **Service User** sub-tab, enter the **Start Date** of the **Case**. Click **Save**.

Support - Case management

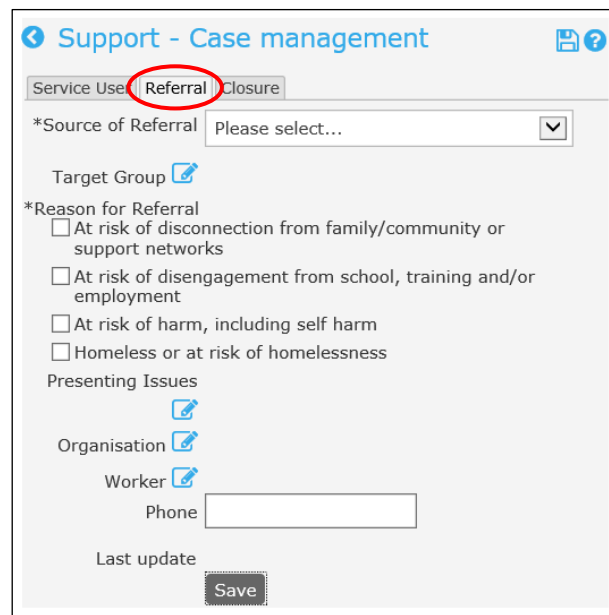
Service User Referral Closure

*Start Date: 02/10/2018

New Client: ☐ Yes ☐ No

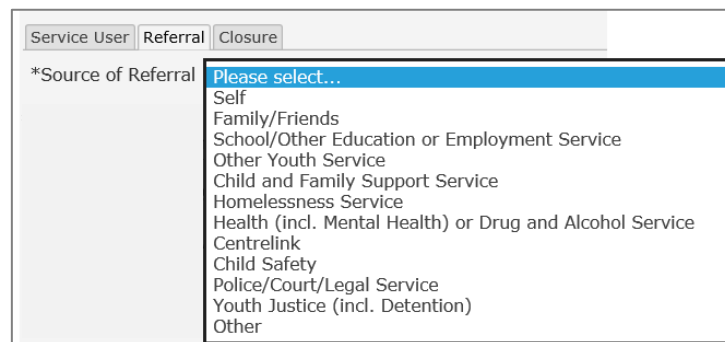
Last update: Save

4. Select the **Referral** sub-tab within the Case :




The screenshot shows a web form titled "Support - Case management". At the top, there are three tabs: "Service User", "Referral", and "Closure". The "Referral" tab is selected and highlighted with a red circle. Below the tabs, there is a dropdown menu for "*Source of Referral" with the text "Please select..." and a downward arrow. Underneath, there is a section for "Target Group" with a blue icon. The next section is "*Reason for Referral", which contains four checkboxes: "At risk of disconnection from family/community or support networks", "At risk of disengagement from school, training and/or employment", "At risk of harm, including self harm", and "Homeless or at risk of homelessness". Below this is a section for "Presenting Issues" with a blue icon. The "Organisation" section has a blue icon and a text input field. The "Worker" section has a blue icon and a text input field. The "Phone" section has a text input field. At the bottom, there is a "Last update" label and a "Save" button.

5. Complete the **Source of Referral** from the drop-down list :



The screenshot shows the "Source of Referral" dropdown list. The list is open, showing a scrollable menu with the following options: "Please select...", "Self", "Family/Friends", "School/Other Education or Employment Service", "Other Youth Service", "Child and Family Support Service", "Homelessness Service", "Health (incl. Mental Health) or Drug and Alcohol Service", "Centrelink", "Child Safety", "Police/Court/Legal Service", "Youth Justice (incl. Detention)", and "Other".

6. Select the **Reason for Referral** - multiple values can be selected
7. Record any **Presenting Issues**, the **Organisation** referred from and the **Worker** from that Organisation by selecting the corresponding  icons
8. Click **Save**.

Refer over page for example....

Support - Case management

Service User
Referral
Closure

*Source of Referral
School/Other Education or Employme

Target Group

*Reason for Referral
☒ At risk of disconnection from family/community or support networks
☒ At risk of disengagement from school, training and/or employment
☐ At risk of harm, including self harm
☐ Homeless or at risk of homelessness

Presenting Issues
Recently, attendance at school has fallen away and when he is there he is very withdrawn - previously a very involved and contributing student.

Organisation
Charleville Outback State School

Worker
Principal : Peter Potato

Phone
4899 1234

Last update
Worker One, Youth Workgroup W
02/10/2018 15:35:19 AEST

Save
Delete
Copy

Print View

9. If a Case has been incorrectly created, you may delete it. **Be very sure this is required.**

IMPORTANT NOTE: Transition period

YSCIS was updated to reflect the new Youth Support model (effective from 1st July 2018) in late December 2018. During this period, services were able to select *Support* or *Integrated Response* cases for the new case category of *Support – case management*.

The ***DCSYW Performance Report*** and the ***DCSYW Performance List*** for periods commencing on and after 1st July, 2018, will include *Support* and / or *Integrated Response* cases, as relevant, in measures defined under the new Youth Support model as *Support – Case management*.

6 Case Notes

Service delivery and your case management activities are recorded using **Notes**. These Notes record the time spent by the worker. These records reflect in the *DCSYW Performance Report* for your service.

Case notes are recorded in the **Persons** Page, from the **Notes** Tab.


The definitions for each category are:

- » **Contact:** direct time spent with the young person, including travel with young person in the vehicle
- » **Case Work:** time spent on behalf of the young person (e.g. case coordination)
- » **Travel:** other travel undertaken including travel to meetings for a client without them in the car.

6.1 Create a Case Note

1. From the **Person** Page select the **Notes** tab
2. Select **Create New Note**

The screenshot shows the YouthSupport interface for a person named Barry Beetroot. The 'Notes' tab is selected in the top navigation bar. In the 'Notes' section, the 'Create New Note' button is highlighted with a red circle. The right-hand panel shows the 'Edit Note Details' form, which includes fields for Date (02/10/2018), Worker/s (Worker One, Youth Workgroup W), Case (Support - Case management (02/10/)), and Contact type. There is also a section for 'Notes' and a table for 'Contact length' with columns for Contact, Case Work, and Travel, all in minutes. At the bottom, there are 'Save' and 'Save Final' buttons.

3. Enter **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.

The screenshot shows the 'Additional workers' dialog box. It has a title bar 'Additional workers' and a list of workers. The first worker is 'Worker One, Youth Workgroup W' with a person icon. Below this, there is a section for 'Additional workers' with a 'Workgroup' dropdown (showing 'Youth Workgroup W'), a 'Worker' dropdown (showing 'Youth Workgroup X' and 'External Organisation...'), and a 'Role' text field. At the bottom, there are 'Add' and 'Close' buttons.

5. **Case** will default to the active case for the Person.
6. Select the **Contact type** from the drop-down list.

* Contact type	Direct Contact Telephone/Virtual Group Work Home visit Outreach Centre-Based Transport Case Work Case coordination Correspondence (incl. email) File / Case Notes Case Panel Meeting Service Response Planning
* Notes	
Contact length	

If you have spent time with a client that includes a number of contact types e.g. *Case coordination* and *Home visit*, select the contact type where you spent the most time. If you want to record the contact time for each contact type separately, simply record a Note for each activity.

7. Record relevant comments relating to the activity in Notes box. This is informed by the case management protocols applied by your service.
8. Enter the time spent with or on behalf of the client in the **Contact length** fields – record time in **minutes**.

Definition of the time breakdown categories are:

- » **Contact**: direct time spent with the young person, including travel with young person in the vehicle
- » **Case Work**: time spent on behalf of the young person (e.g. case coordination)
- » **Travel**: other travel undertaken including travel to meetings with a client without them in the car

All time is included in your Performance Report (Travel time has been included from 1st April 2018).

9. Select **Save** to save a draft of the Note. (All notes will become locked/un-editable after 2 weeks of saving).

Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

[Home](#)
[Search](#)
[Details](#)
[Notes](#)
[Payments](#)
[Alerts](#)
[Consent](#)
[Referrals](#)
[Plans](#)
[Tasks](#)
[Outcomes](#)
[Documents](#)
[Membership](#)

[Persons](#)
[Groups](#)
[Days](#)
[Reports](#)
[Admin](#)

Notes

Filter Create New Note

Date	Worker / Type	Notes
02/10/2018	Worker One Home visit	Met with Barry to discuss how things were going - specifically to follow-up regarding last week at school and to ascertain his plans for the holidays.

Export Notes 1 to 1 of 1

Edit Note Details

Date: 02/10/2018

* Worker/s: Worker One, Youth Workgroup W
Trevor, HeadSpace [Counsellor]

Case: Support - Case management (02/10/2018)

* Contact type: Home visit

* Notes: Met with Barry to discuss how things were going - specifically to follow-up regarding last week at school and to ascertain his plans for the holidays.

Contact length: Contact 45 Case Work Travel 30 mins


May be edited to 16/10/2018

Last update: Worker One, Youth Workgroup W
02/10/2018 16:06:33 AEST

Save Save Final

Print View

10. Select **Save Final** to lock the Note.

Note Details 

This document is now locked

Date	02/10/2018						
Worker/s	Worker One, Youth Workgroup W Trevor, HeadSpace. [Counsellor]						
Work group	Youth Workgroup W						
Case	Support - Case management (02/10/2018 - current)						
Contact type	Home visit						
Notes	Met with Barry to discuss how things were going - specifically to follow-up regarding last week at school and to ascertain his plans for the holidays.						
Contact length	<table><tr><td>Contact</td><td>Case Work</td><td>Travel</td></tr><tr><td>45</td><td></td><td>30 mins</td></tr></table>	Contact	Case Work	Travel	45		30 mins
Contact	Case Work	Travel					
45		30 mins					
Edit locked	02/10/2018						
Last update	Worker One, Youth Workgroup W 02/10/2018 16:19:28 AEST						

Print View

Additional Notes:

- » A user with YSCIS *Coordinator* access level is able to delete a Note record that is not locked.
- » After a record is locked, it is no longer able to be edited.
- » To unlock a Note (for amendments), contact the Infoxchange HelpDesk.

6.2 Create a Case Note for a Case Panel meeting

When a Case Note is created for a client that has a Support – Case management case (previously, an Integrated Response case), additional fields are displayed when the *Contact type* is **Case Panel Meeting**.

The two additional fields are **Did 2 or more external organisations attend** and **Organisations Attending**. This information is included in *DCSYW Performance Report* for your service (for Measure IS131).

Edit Note Details

Date14/12/2018

* Worker/sA Coordinator Training 1A
D User Training 1A. [Youth Support worker]
Tania Tomato Relationships Matter Inc.. [Counsellor]
Beatrice Banana Safe Housing Solutions. [Manager]

CaseSupport - Case management (02/10/)

* Contact typeCase Panel Meeting

* Notes
Very constructive meeting held. Immediate actions identified and agreed by all parties. Follow-up meeting to be scheduled for next week.

* Did 2 or more external organisations attend?
Organisations AttendingRelationships Matter Inc.
Safe Housing Solutions

* Contact length
ContactCase WorkTravel
90mins
May be edited to 28/12/2018
Last update

SaveSave Final

7 Assessments

7.1 Record Assessments

Youth Wellbeing Assessments are recorded in the **Persons** page, **Outcomes** tab.

Assessment data is collated for performance reporting for your service.

Details and instructions on completing the Youth Wellbeing Common Assessment Tool can be found on the following website <https://www.csyw.qld.gov.au/youth/youth-support-services>

For **Access** cases, workers can record an *Initial contact assessment*. The *Initial contact assessment* is a light touch assessment with only the first six questions included from the Youth Wellbeing Assessment. An *Initial contact assessment* should be undertaken prior to referring the client to another agency to ensure that the full range of issues faced by the client are recorded and passed on to the referral agency. This assessment is designed to assist you in determining the full needs of the young person and not for tracking their progress or for capturing data for performance measures.

For **Support – Case management** cases, workers can record *First*, *Review* and *Final* Assessments. Multiple *Review* assessments can be completed during your period of working with the young person (refer to Sections 3 & 4 of the Youth Support Practice Guide for best practice regarding assessments).

NOTE: To support the transition to the new Youth Support Program model, YSCIS allows for *Review* and *Final* Assessments to be recorded for open **Support** and **Integrated Response** cases. These will be recognised in your *DCSYW Performance Report*.

Edit Review Details

Completed 14/12/2018

* Worker/s Worker Two, Youth Workgroup W

* Outcome type Review - Support - Case manager

Case Support Case (13/03/2018 - current)

Note: Refer to the Youth Wellbeing Assessment (Common Assessment Tool) for further information on selecting scores.

Show ☒ Comments ☒ Priority

Score key				
1	2	3	4	5
Can be a lot better	Can be better	OK	Doing well	Doing great

My Housing

Score ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Edit Review Details

Completed 14/12/2018

* Worker/s Worker Two, Youth Workgroup W

* Outcome type Review - Support - Case manager

Case Integrated Response Case (07/07/20)

Note: Refer to the Youth Wellbeing Assessment (Common Assessment Tool) for further information on selecting scores.

Show ☒ Comments ☒ Priority

Score key				
1	2	3	4	5
Can be a lot better	Can be better	OK	Doing well	Doing great

My Housing

Score ☐ 1 ☐ 2 ☒ 3 ☐ 4 ☐ 5

1. From the **Persons** page, select the **Outcomes** tab, click **Create New Review**

The screenshot shows the 'Youth Support' system interface. At the top, it displays 'Training 1A' and 'Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)'. The left sidebar contains navigation links: Home, Persons, Groups, Days, Reports, Admin, and a Recent List. The main content area has tabs for Search, Details, Notes, Payments, Alerts, Consent, Referrals, Plans, Tasks, Outcomes, Documents, and Membership. The 'Outcomes' tab is selected, and the 'Create New Review' button is highlighted with a red circle. Below this, there is a 'Reviews' section with a 'No Reviews to display' message. On the right, the 'Edit Review Details' form is visible, showing fields for 'Completed' (31/10/2018), 'Worker/s' (A Coordinator, Training 1A), 'Outcome type' (dropdown), and 'Case' (Support - Case management (31/10/)). A 'Score key' table is also present, and a 'My Housing' section at the bottom shows a score of 0.

2. Enter the Date the Assessment was **Completed**.
3. Select the **Outcome Type**.
For Access Cases, select *Initial contact assessment*.
For Support – Case management (or open Support or Integrated Response cases during the transition period), select relevant Assessment from the list.

The screenshot shows the 'Outcome type' dropdown menu. It lists two main categories: 'Access Cases' and 'Support - Case management Cases'. Under 'Access Cases', there is one option: 'Initial contact assessment'. Under 'Support - Case management Cases', there are four options: 'First - Support - Case management Case', 'Review - Support - Case management Case', 'Final - Support - Case management Case', and 'Final - Support - Case management Case'.

4. **Case** will default to current case profile.
5. **Show Comments** and **Priority** will be pre-set to checked. If you do not wish to see the comments or priority, uncheck the boxes.

The screenshot shows the 'Edit Review Details' form. It includes fields for 'Completed' (03/10/2018), 'Worker/s' (Worker One, Youth Workgroup W), 'Outcome type' (First - Support - Case management Case), and 'Case' (Support - Case management (02/10/)). A note at the bottom states: 'Note: Refer to the Youth Wellbeing Assessment (Common Assessment Tool) for further information on selecting scores.' At the bottom of the form, there are two checkboxes: 'Show Comments' and 'Priority', both of which are checked and highlighted with a red box.

6. For each domain, record the assessed position of the young person with regard to the **Score key**.
7. Against each domain, the user can select if the domain is a priority for the client and also add any additional comments.

8. Select **Save** to save a draft of the assessment. To modify this assessment at a later stage, select the assessment from the list screen, update as required, then select **Save**.
9. Select **Save Final** to lock the assessment (cannot be modified).
10. Assessment can be printed by selecting **Print View**.

Additional Notes:

- » A user with YSCIS Coordinator access level is able to delete an assessment record that is not locked.
- » Deleting assessment records from a previous reporting period may impact on Performance Report for your services. It is recommended **not** to delete data that predates the current quarter.

Example of *Initial contact assessment* for Access cases

Edit Review Details

Completed

* Worker/s A Coordinator, Training 1A ✗

* Outcome type

Case

Note: Refer to the Youth Wellbeing Assessment (Common Assessment Tool) for further information on selecting scores.

Show ☒ Comments ☒ Priority

Score key	1	2	3	4	5
	Can be a lot better	Can be better	OK	Doing well	Doing great

My Housing

Score ☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Priority ☒ Yes

What is your current housing situation?

My schooling or work & income

Score ☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Priority ☐ Yes

What is your schooling or work & income?

My family relationships

Score ☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Priority ☐ Yes

What is your current family relationships situation?

My physical health

Score ☐ 1 ☐ 2 ☒ 3 ☐ 4 ☐ 5

Priority ☐ Yes

What is your current physical health?

My drug and alcohol use

Score ☐ 1 ☐ 2 ☐ 3 ☒ 4 ☐ 5

Priority ☐ Yes

What is your current drug and alcohol use situation?

My mental health

Score ☐ 1 ☐ 2 ☒ 3 ☐ 4 ☐ 5

Priority ☐ Yes

Do you have any mental health issues at the moment?

Comments

Last update A Coordinator, Training 1A
31/10/2018 14:10:12 AEST

Example of Assessment for Support – Case management cases

Edit Review Details

Completed 03/10/2018

* Worker/s Worker One, Youth Workgroup W

* Outcome type First - Support - Case management

Case Support - Case management (02/10/2018)

Note: Refer to the Youth Wellbeing Assessment (Common Assessment Tool) for further information on selecting scores.

Show Comments Priority

Score key
1 2 3 4 5
Can be a lot better Can be better OK Doing well Doing great

My Housing
Score 1 2 3 4 5
Priority Yes
What is your current housing situation? Has been living with aunty in a stable environment for last 3 months.

My schooling or work & income
Score 1 2 3 4 5
Priority Yes
What is your schooling or work & income? Finds classes a challenge. Every now and then, skips school ...which only exacerbates the situation.

My family relationships
Score 1 2 3 4 5
Priority Yes
What is your current family relationships situation? Relationship with Mother has broken down when her new partner moved in to the family home.

My social connections
Score 1 2 3 4 5
Priority Yes
What is the current level of your social connections with peers? Has a couple of close friends (although potentially influences undesirable behaviour)

My physical health
Score 1 2 3 4 5
Priority Yes
What is your current physical health?

My drug and alcohol use
Score 1 2 3 4 5
Priority Yes
What is your current drug and alcohol use situation? No regular use, but does experiment.

My mental health
Score 1 2 3 4 5
Priority Yes
Do you have any mental health issues at the moment? A bit unsettled due to relationship with Mother and not a stable school experience.

My culture
Relevant Yes No

My parenting and children
Relevant Yes No

My disability
Relevant Yes No

My safety & the law
Relevant Yes No

My desire / motivation to make changes
Score 1 2 3 4 5
Priority Yes
What is your current desire / motivation to make changes? Appropriate counselling with his Mother and support at school would be ok.

My belief in my capacity to make changes
Score 1 2 3 4 5
Priority Yes
What is your current belief in your capacity to make changes?

Comments

Last update Worker One, Youth Workgroup W
03/10/2018 09:13:56 AEST

Save Save Final

Print View

7.2 Compare Client Assessments

For assessments recorded against **Support – Case management** cases (including **Support** and **Integrated Response** cases during transition), users can compare a **First**, a **Review** and a **Final** assessment using the chart function.

The Chart can be opened as PDF and printed.

1. From the **Persons** page, **Outcomes** tab, select **Chart**


The screenshot shows the YouthSupport interface for a client named Barry Beetroot. The 'Outcomes' tab is selected in the top navigation bar. Below the navigation bar, there is a 'Reviews' section with a table of assessments. The 'Chart' button is circled in red.

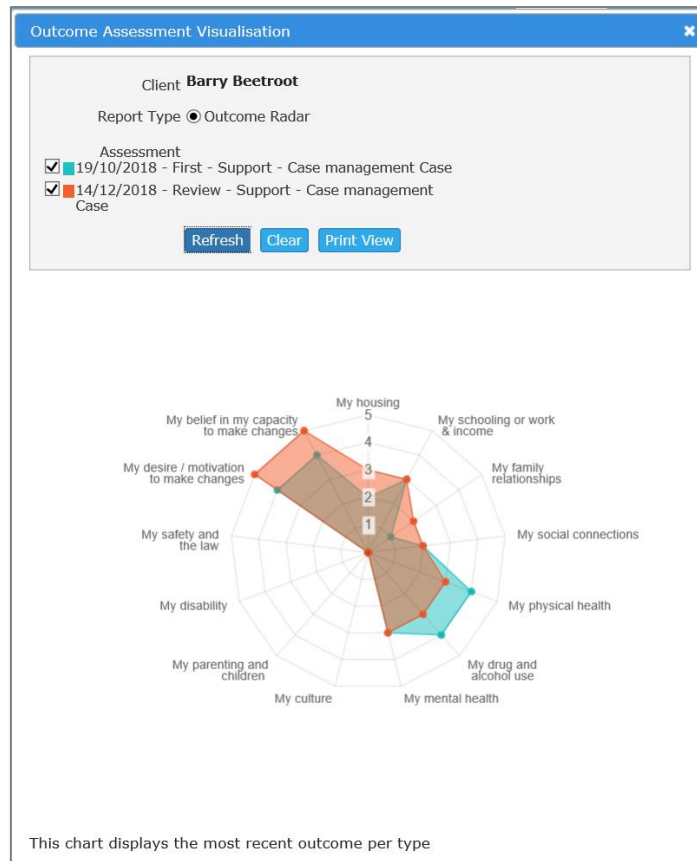
Date ↑	Worker / Type	Comments
14/12/2018	A Coordinator Review - Support - Case management Case	
19/10/2018	A Coordinator First - Support - Case management Case	

2. Select the Assessments you wish to compare (tick the checkbox) and click **Refresh**.

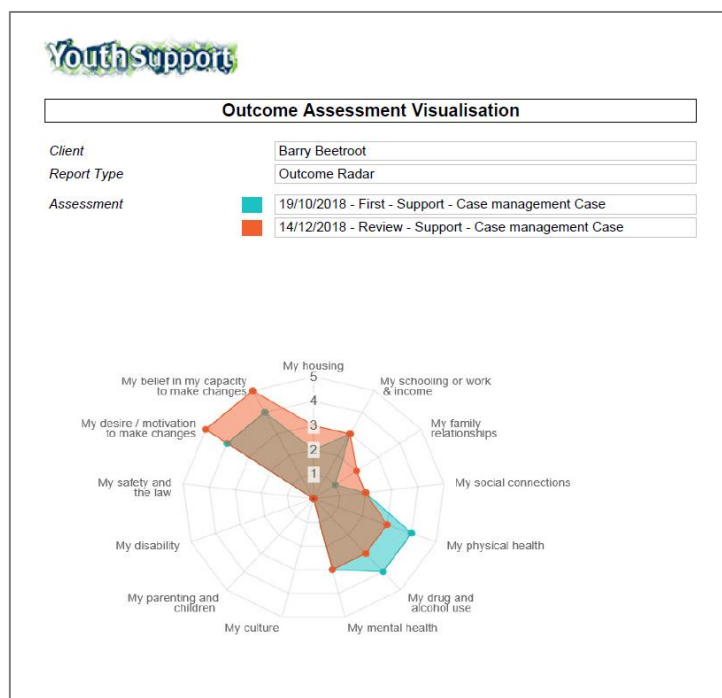
The screenshot shows the 'Outcome Assessment Visualisation' window. It displays the client name 'Barry Beetroot' and the report type 'Outcome Radar'. Under the 'Assessment' section, two assessments are listed with checkboxes: '19/10/2018 - First - Support - Case management Case' and '14/12/2018 - Review - Support - Case management Case'. Both checkboxes are checked. At the bottom, there are buttons for 'Refresh', 'Clear', and 'Print View'.

3. The Chart will display, showing the comparison between the selected Assessments – refer screenshot on the following page.

If you wish to change the assessments to display, simply click  and select the assessments you wish to view.

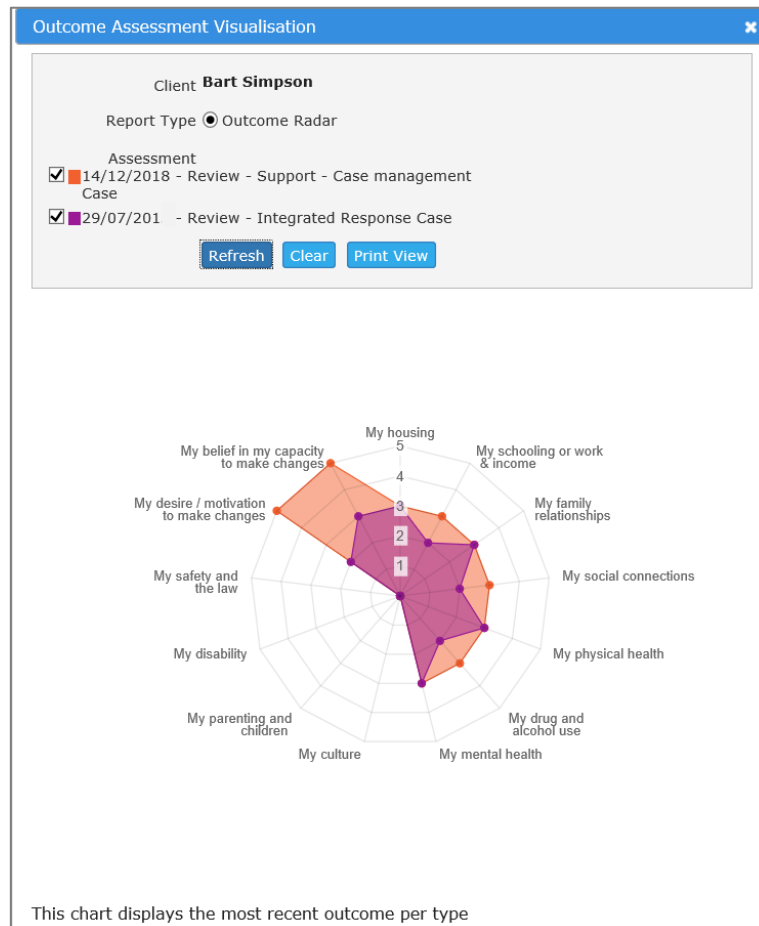


Users can print the chart by selecting **Print View**. It will generate as a pdf document.



Additional Notes:

- » The chart will only display the most recent outcome per type, e.g. it will only compare the most recent 'First' assessment against the most recent 'Review' and most recent 'Final' assessment. You cannot compare two 'Review' assessments using this functionality, this can be done by filtering data available from an *Outcomes List* (refer to section [Reports](#)).
- » To support the transition to the new Youth Support Program model, subsequent review assessments completed for the open Case will be available as below :



8 Case Plans

A Plan is a structured intervention comprising specific actions to address the needs of the young person. The **Plans** tab enables you to create and manage a care or case plan for a young person.

A person can have multiple plans, although it is unusual to have more than one current plan. Each plan can have multiple actions enabling the identification and recording of issues, goals, actions and outcomes.

8.1 Create Case Plan

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

YouthSupport Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals **Plans** Tasks Outcomes Documents Membership

Persons Plans Filter Create New Plan

Groups

Days

Reports

Admin

Recent List
Barry Beetroot
Marge Simpson
Da Don
Luke Skywalker
Anita Trouble
Cccc Cccc
Harriett Honeydew

No Plans to display

Edit Plan Details

Date 03/10/2018 Review date
* Oversight Worker One, Youth Workgroup W Close date
* Plan type Support - Case management Last update
Description Save

3. Enter the **Date** (defaults to today's date) and **Review date** by using the calendar icon
4. **Plan type** will auto-populate to **Support – case management**
5. Enter a **Description** of the plan e.g. Support Plan
6. Click **Save**. The following screen will appear. You can now add Actions to your Plan.

YouthSupport Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals **Plans** Tasks Outcomes Documents Membership

Persons Plans Filter Create New Plan

Groups

Days

Reports

Admin

Recent List
Barry Beetroot
Anita Trouble
Marge Simpson
Da Don
Luke Skywalker
Cccc Cccc
Harriett Honeydew
Mary Mushroom
Peter Pineapple

Date	Review Date	Worker	Close Date	Description
03/10/2018	15/11/2018	Worker One		Support Plan

Export Plans 1 to 1 of 1

Edit Plan Details

Date 03/10/2018 Review date 15/11/2018
* Oversight Worker One, Youth Workgroup W Close date
* Plan type Support - Case management Last update Worker One, Youth Workgroup W 03/10/2018 09:46:20 AEST
Description Support Plan Create New Action

No Actions to display

Print View Save

7. Click **Create New Action**. The **Edit Action Details** form will display.

The screenshot displays the Youth Support system interface. At the top, the user is logged in as Barry Beetroot, Male, DOB: 20/01/2004 (Age 14 yrs). The main navigation bar includes Home, Search, Details, Notes, Payments, Alerts, Consent, Referrals, Plans, Tasks, Outcomes, Documents, and Membership. The left sidebar shows a Recent List of users: Barry Beetroot, Anita Trouble, Marge Simpson, Da Don, Luke Skywalker, Cccc Cccc, Harriett Honeydew, Mary Mushroom, and Peter Pineapple. The main content area is titled 'Plans' and shows a table with one plan: 'Support Plan' created on 03/10/2018, reviewed on 15/11/2018, by Worker One. Below the table, the 'Edit Plan Details' form is visible, showing fields for Date, Review date, Close date, Last update, and Description. The 'Create New Action' button is circled in red. Below the plan details, the 'Edit Action Details' form is shown, which includes fields for Created, Review date, Worker/s, and a section for Progress (Goal not achieved, Goal fully achieved, N/A). The 'Order' field is also circled in red.

Youth Support

Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons Plans Filter Create New Plan

Date	Review Date	Worker	Close Date	Description
03/10/2018	15/11/2018	Worker One		Support Plan

Export Plans 1 to 1 of 1

Edit Plan Details

Date: 03/10/2018 Review date: 15/11/2018 Close date: Last update: Worker One, Youth Workgroup W 03/10/2018 09:46:20 AEST

* Oversight: Worker One, Youth Workgroup W * Plan type: Support - Case management Description: Support Plan

Actions Create New Action

No Actions to display

Edit Action Details

Created: 03/10/2018 Review date: Worker/s: Worker One, Youth Workgroup W Last update: Progress: Goal not achieved 1 Goal fully achieved 5 N/A Comments on Progress: Action Closed: Order: 0

Family name search GO Print View Save

8. For each Action, complete the details for Issue, Goal and Action. Click **Save**.
9. Repeat the above step to complete your plan.
10. The order in which Actions appear in your Plan can be changed by using the Order field in the bottom right-hand corner of each Action. When each Action is created, it is assigned an order of "0". Simply assign the required number in each Action to change the order in which they appear in the Plan.

An example plan is shown below:

Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals **Plans** Tasks Outcomes Documents Membership

Persons Groups Days Reports Admin

Plans Filter Create New Plan

Date ↑	Review Date	Worker	Close Date	Description
03/10/2018	15/11/2018	Worker One		Support Plan

Export Plans 1 to 1 of 1

Edit Plan Details

Date: 03/10/2018 Review date: 15/11/2018

* Oversight Worker One, Youth Workgroup W

* Plan type: Support - Case management

Description: Support Plan

Last update: Worker One, Youth Workgroup W 03/10/2018 10:05:14 AEST

Actions Create New Action

Date/Worker Issue	Goals	Actions	Review/Close
03/10/2018 Worker One Relationship with Mother has broken down	To establish healthy relationship with Mother	Arrange appropriate counselling sessions	Review: Close: Progress: Outcome: Not Set
03/10/2018 Worker One Relationship with Mother has broken down	To establish healthy relationship with Mother	Monitor attendance and progress from counselling sessions	Review: Close: Progress: Outcome: Not Set
03/10/2018 Worker One Strengthen engagement with school	Establish positive schooling environment	Meet with teachers to understand Barry's strengths and where support is required	Review: Close: Progress: Outcome: Not Set
03/10/2018 Worker One Strengthen engagement with school	Establish positive schooling environment	Explore Barry's engagement in regular sporting activity	Review: Close: Progress: Outcome: Not Set

Edit Action Details

Created: 03/10/2018 Review date:

* Worker/s: Worker One, Youth Workgroup W

Last update: Worker One, Youth Workgroup W 03/10/2018 10:00:41 AEST

Issue: Relationship with Mother has broken down

Goals: To establish healthy relationship with Mother

Actions: Arrange appropriate counselling sessions

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

Comments on Progress:

Action Closed: Order: 0

Save

Print View

Family name search: GO

The Action highlighted in blue is open at the bottom of the screen, for editing and updating.

Additional Notes:

- » When using plans for the first time, it is recommended to keep the plan relatively simple, perhaps creating a new action for each different issue.
- » If you are conducting joint case management, it is possible to record other workers and/or services involved in the oversight of the plan or as the responsible worker for a specific action. Each worker will be provided with a reminder, which appears in their **My Tasks** tab, at the review date.
- » A closed **Action** becomes a **Prior Action** that can only be viewed by clicking **View Prior**. This is required if you wish to print all actions associated with a plan.

9 Brokerage

Financial support provided to the young person can be recorded as follows:

1. From the **Persons** Page, **Payments** tab, select **Create New Payment**. The **Edit Payment details** form will display on the right-hand side of the screen.

Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes **Payments** Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons Payments Filter Create New Payment

No Payments to display

Edit Payment Details

Date 03/10/2018

* Worker/s Worker One, Youth Workgroup W

* Payment type Brokerage

* Case Support - Case management (02/10/)

* Amount \$ 0

* Details

Last update

Save

2. Enter **Date** of payment (defaults to today's date).
3. The **Worker** field will default to the user entering the brokerage payment.
4. Select **Payment type** of *Brokerage*.
5. **Case** will default to current case.
6. Enter the **Amount**.
7. Enter **Details** of brokerage payment, such as what it was for and invoice number
8. Scanned copies of invoices/supporting documents can be attached by clicking the **Browse** button.
9. Select **Save**. To modify the payment select the payment from the list screen and update as required then select **Save**.

Youth Support Youth Workgroup W
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes **Payments** Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons Payments Filter Create New Payment

Date	Worker / Type	Purpose	Amount
03/10/2018	Worker One Brokerage	For school uniforms	\$50.00
Total: \$50.00			1 to 1 of 1

Export Payments

Edit Payment Details

Date 03/10/2018

* Worker/s Worker One, Youth Workgroup W

* Payment type Brokerage

* Case Support - Case management (02/10/)

* Amount \$ 50.00

* Details For school uniforms

Scanned copy Select & Upload (Max File Size: 5 MB)

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

Last update Worker One, Youth Workgroup W
03/10/2018 10:14:34 AEST

Save

Print View

Additional Notes:

- » If significant time was spent providing brokerage to the client, this would need to be captured as a **Note**. Refer to section [Create a Case Note](#)
- » You are able to attach documents to the payment record after you click **Save**.
- » A user with YSCIS Coordinator access level is able to delete a Payment record.
- » Payments can be printed by selecting **Print View**.

10 Referrals

This section outlines the important functionality for:

- » Making referrals **to** another service provider, and
- » Responding to (acknowledging and accepting) referrals **from** another YSCIS service provider.

10.1 Making Referrals to another service provider

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 Youth Support system interface. At the top, it displays 'Youth Support' and 'Youth Workgroup W'. Below this, the user's name 'Barry Beetroot' is shown along with 'Male, DOB: 20/01/2004 (Age 14 yrs)'. A navigation bar includes tabs for Home, Search, Details, Notes, Payments, Alerts, Consent, Referrals, Plans, Tasks, Outcomes, Documents, Membership, and Menu. The 'Referrals' tab is selected. On the left, a sidebar lists options: Home, Persons, Groups, Days, Reports, Admin, and a Recent List. The main content area shows the 'Referrals' section for Barry Beetroot, stating 'This person has no history of referrals on record'. A red circle highlights the 'Create new Referral' button. To the right, the 'Referral' form is visible, featuring radio buttons for 'Search', 'Favourites', 'Manual', and 'YSCIS Services'. The 'YSCIS Services' option is circled in red. Below the radio buttons is a 'Keywords' search field with 'Search' and 'Clear' buttons. A note at the bottom of the form states: 'Search the Service Seeker database for the service you wish to refer to.'

There are **two** recommended options for making a referral to another service. These are:

- » **YSCIS Services:** This is a referral to another **Youth Support** Service Provider that has access YSCIS. The referral and case file information is automatically sent within YSCIS and an email is sent to the Service Provider contact email address. We recommend as best practice that this is followed up with a phone call as a courtesy and to ensure no referral accidentally slips through the gaps.
- » **Manual:** This includes referrals to internal or external providers that are not Youth Support YSCIS services. **The referral and associated case file information must be manually sent by the user outside of YSCIS.**

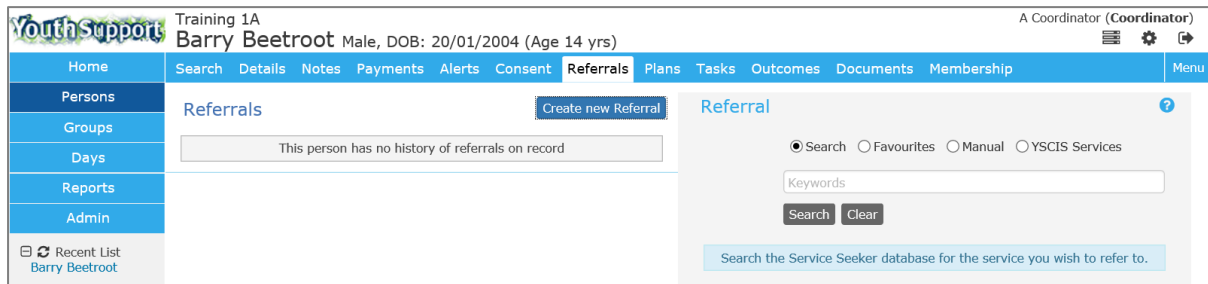
The *Search* and *Favourites* radio buttons access the Service Seeker Database. This is a separate database maintained by Infoxchange – it is independent of YSCIS. This option requires referral information to be manually communicated. For efficiency, the Manual option noted above is recommended.

The detailed steps for each of these options are outlined in the respective sections.

10.1.1 Send a referral to another Youth Support service

The **YSCIS Services** radio button enables you to make an electronic referral to another Youth Support service. The referral will appear on the receiving service provider's **Referral** tab (on the **Home** page) in their YSCIS workgroup. In addition, YSCIS will email a notification of the referral to the contact email address stored within YSCIS for that service.

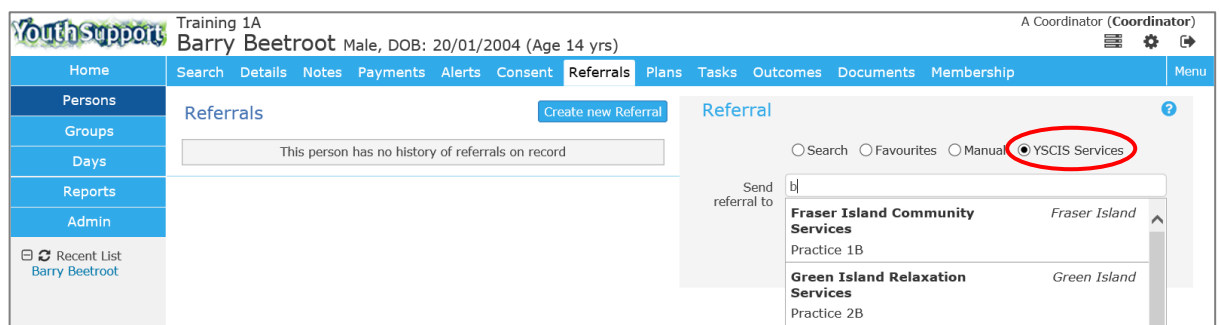
1. On the **Persons** page, **Referrals** tab, click [Create new Referral](#)



The screenshot shows the YouthSupport interface for a user named Barry Beetroot. The 'Referrals' tab is active, and the 'Create new Referral' button is highlighted. The interface includes a sidebar with navigation options like Home, Persons, Groups, Days, Reports, and Admin. The main content area shows a message: 'This person has no history of referrals on record'.

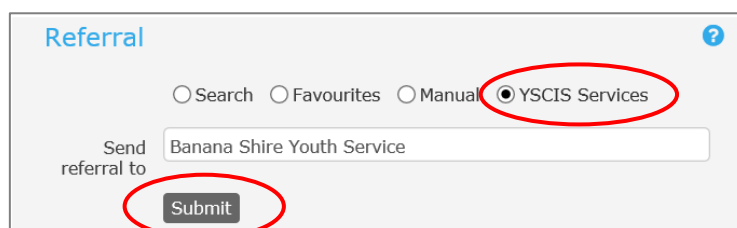
2. Select radio button for **YSCIS Services**

In the **Send referral to** field, enter Service Name or name of organisation.



The screenshot shows the 'Referral' form in the YouthSupport system. The 'YSCIS Services' radio button is selected and circled in red. Below it, a list of services is displayed, including 'Fraser Island Community Services' and 'Green Island Relaxation Services'. The 'Send referral to' field is partially filled with the text 'b'.

Select required Service from the List and click **Submit**



The screenshot shows the 'Referral' form in the YouthSupport system. The 'YSCIS Services' radio button is selected and circled in red. Below it, the 'Send referral to' field is filled with the text 'Banana Shire Youth Service'. The 'Submit' button is highlighted with a red circle.

The Referral form will now be displayed.

Referral

Status: New referral

Restriction: ☒ Workgroup ☐ Limited ☐ Cluster

From: Youth Workgroup W

To: Banana Shire Youth Service

Service: Banana Shire Youth Service

Program / Group:

Organisation: Anglicare - Central Queensland Limited

Email: Nick.Harrison@communities.qld.gov.au

For: Barry Beetroot

Details

Referral type: ☐ Internal within organisation ☐ External

Referred to:

Presenting issues:

Additional Information:

Attachments

Referral History

Consent to send: ☐ Yes ☒ No

Comment:

Save Draft Send

3. Complete the **Details** section :
 - identify if the Referral is **Internal** within your organisation or **External**
 - select **Referred to** value from the drop-down list

Details

Referral type: ☐ Internal within organisation ☒ External

Referred to:

- School/Other Education or Employment Service
- Other Youth Service
- Child and Family Support Service
- Homelessness Service
- Health (incl. Mental Health) or Drug and Alcohol Service
- Centrelink
- Child Safety
- Police/Court/Legal Service
- Youth Justice (incl. Detention)
- Other


4. Record details for **Presenting Issues** and **Additional Information** to inform the receiving service about your client
5. Click **Save Draft** at the bottom of the form.

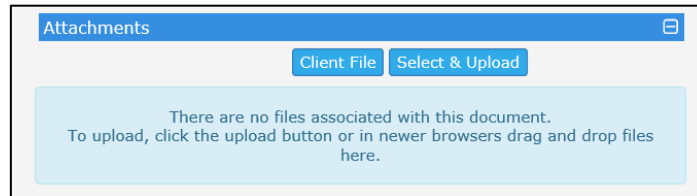
Referral History

Consent to send: ☐ Yes ☒ No

Comment:

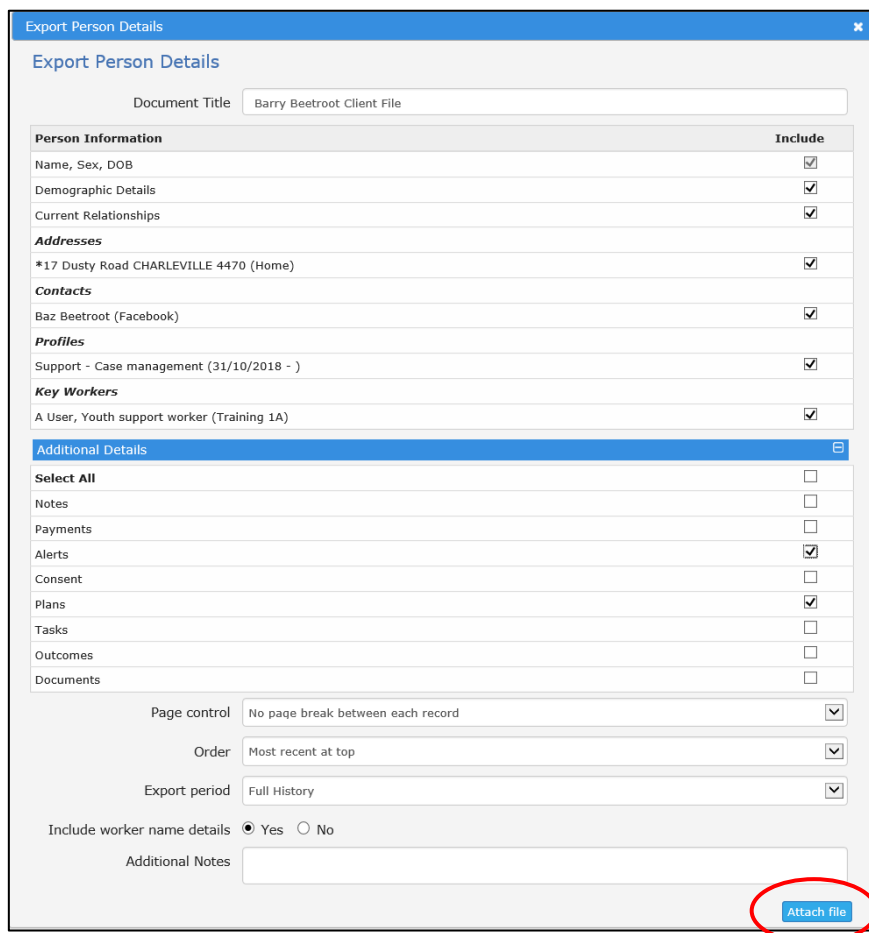
Save Draft Send

6. If documentation is required to be attached once the draft has been saved, expand the **Attachments** section by selecting the  icon. You can select to attach documentation from the **Client File** or select files located on the user's computer (external to YSCIS).



The screenshot shows the 'Attachments' section of a document. It has a blue header with the title 'Attachments' and a close button. Below the header are two buttons: 'Client File' and 'Select & Upload'. A light blue message box in the center states: 'There are no files associated with this document. To upload, click the upload button or in newer browsers drag and drop files here.'

7. Select **Client File** then select the information you wish to attach to the referral. Select the required **Page control**, **Order**, **Export Period** options and click **Attach file**



The screenshot shows the 'Export Person Details' form. At the top, there's a 'Document Title' field with the value 'Barry Beetroot Client File'. Below this is a table with two columns: 'Person Information' and 'Include'. The table lists various categories like Name, Sex, DOB, Demographic Details, Current Relationships, Addresses, Contacts, Profiles, and Key Workers, each with a checkbox in the 'Include' column. Below the table is an 'Additional Details' section with a blue header and a close button. It contains a 'Select All' checkbox and a list of items: Notes, Payments, Alerts, Consent, Plans, Tasks, Outcomes, and Documents, each with a checkbox. Below this are three dropdown menus: 'Page control' (set to 'No page break between each record'), 'Order' (set to 'Most recent at top'), and 'Export period' (set to 'Full History'). There are also radio buttons for 'Include worker name details' (set to 'Yes') and a text field for 'Additional Notes'. At the bottom right, there is a blue button labeled 'Attach file' which is circled in red.

8. Attachment is now shown within the referral.

Referral

?

Status

Draft

Restriction

☒ Workgroup
 ☐ Limited
 ☐ Cluster

From Hamilton Island Welfare Services

To Toowoomba Youth Services

Service

Toowoomba Youth Services

Program / Group

Organisation

Training 2A

For Barry Beetroot

Details

Referral type

☐ Internal within organisation
 ☒ External

Referred to

Other Youth Service

Presenting issues

Client is relocating to join extended family. Ongoing support to address identified issues is welcomed.

Additional Information

Attachments

Client File

Select & Upload

File Name	Uploaded	
client_file_4011.pdf	31/10/2018 15:26:08 AEST	

Referral History

Consent to send

☐ Yes
 ☒ No

Comment

Save Draft


Send

Delete

PDF

Copy


- Consent must be obtained from your client to make the referral.
Click Yes for **Consent to send**
- If you are ready to send the referral, click **Send**

Referral History 

☒ Yes ☐ No

Comment

11. When **Send** is selected, the referral and associated attached information/ documentation is sent to the service provider within YSCIS. The *Status* of the referral will change from *Draft* to *Waiting*.




Training 1A

Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

[Home](#)
[Search](#)
[Details](#)
[Notes](#)
[Payments](#)
[Alerts](#)
[Consent](#)
[Referrals](#)
[Plans](#)
[Tasks](#)

[Persons](#)
[Groups](#)
[Days](#)
[Reports](#)
[Admin](#)

[Create new Referral](#)

Id	Referral Date	Status	From	To
 2	31/10/2018	Waiting	Hamilton Island Welfare Services Training 1A	Toowoomba Youth Services Training 2A

When that service *Acknowledges*, *Accepts* or *Declines* the referral, the Status will be updated in your workgroup.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home	Search	Details	Notes	Payments	Alerts	Consent	Referrals	Plans	Tasks
------	--------	---------	-------	----------	--------	---------	-----------	-------	-------

Persons Groups Days Reports Admin

Referrals [Create new Referral](#)

Id	Referral Date	Status	From	To
2	31/10/2018	Accepted	Hamilton Island Welfare Services Training 1A	Toowoomba Youth Services Training 2A

12. Once a referral has been sent, you may **Recall** it – this is only available until the receiving service updates the *Status* of the referral.
A **copy** can be used in the instance where the user has to complete multiple referrals for a client. You can also create a pdf, which may be printed, should this be required.

10.1.2 Create a Manual Referral

Manual referrals are used to record referrals made to non-Youth Support services or to capture light-touch referrals for a client, such as phone referrals.

For phone referrals, where documentation is not required to be sent as part of the referral, the user can complete a Manual referral to capture details. The notification to the new service provider and all associated information needs to be sent outside of YSCIS.

1. Select the **Persons** page, **Referrals** tab, click **Create new Referral**
2. Select **Manual** radio button
3. Enter in details of the service you are referring the young person as relevant.
Click **Submit**

Referral ?

☐ Search ☐ Favourites ☒ Manual ☐ YSCIS Services

Service Name: Whitsunday Youth Matters

Program / Group:

Organisation Name:

Phone: 4855 6699

Fax:

Email: contactus@whitsundayyouth.org

Submit

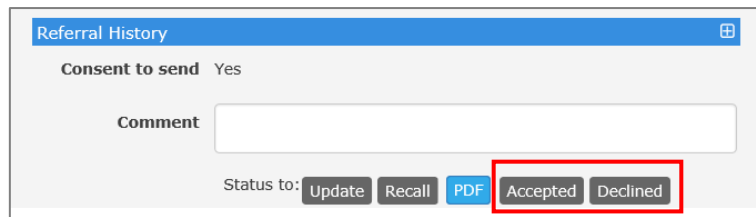
The following form will appear.

4. Complete the **Details** section :
 - identify if the Referral is **Internal** within your organisation or **External**
 - select **Referred to** value from the drop-down list
5. Record helpful information in the *Presenting Issues* and *Additional Information* sections
6. Click **Save Draft** at the bottom of the form.
7. Use the *Attachments* section to record any associated records you provide to this service (supporting the referral). Please refer to the relevant steps outlined in the preceding section.
8. When you are ready to send the information to the referrer, click **Yes** for Consent to send.
Then, click **Waiting**. This will update the *Status* of the referral to *Waiting*.

9. **All documentation and communication regarding this referral must be sent outside of YSCIS.**

When a referral has been marked as **Waiting**, it is understood that it has been manually sent to the external service provider and you are waiting for a response from them.

The options at the bottom of the screen change to **Update**, **Recall**, **Accepted** and **Declined**.



The screenshot shows a web interface titled "Referral History". Below the title bar, there is a "Consent to send" section with a "Yes" button. Below that is a "Comment" text input field. At the bottom, there is a "Status to:" label followed by five buttons: "Update", "Recall", "PDF", "Accepted", and "Declined". The "Accepted" and "Declined" buttons are highlighted with a red rectangular box.

10. After receiving advice from the service provider, update the referral to **Accepted** or **Declined**. They can also **Update** the referral (modify) or **Recall** the Referral. A **PDF** copy of the referral can also be generated and either emailed or printed/faxed

11. 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 a client.

10.1.3 Record referral using the Service Seeker database

The Service Seeker Database is a national database of service providers maintained by Infoxchange. This is independent of YSCIS. The details for each service provider contained in the service seeker database are for information only and referrals made in this manner should be treated as **Manual Referrals**, with the user manually sending the referral and documentation to the service provider.

Please refer to the preceding section for guidance to record a **Manual Referral**.

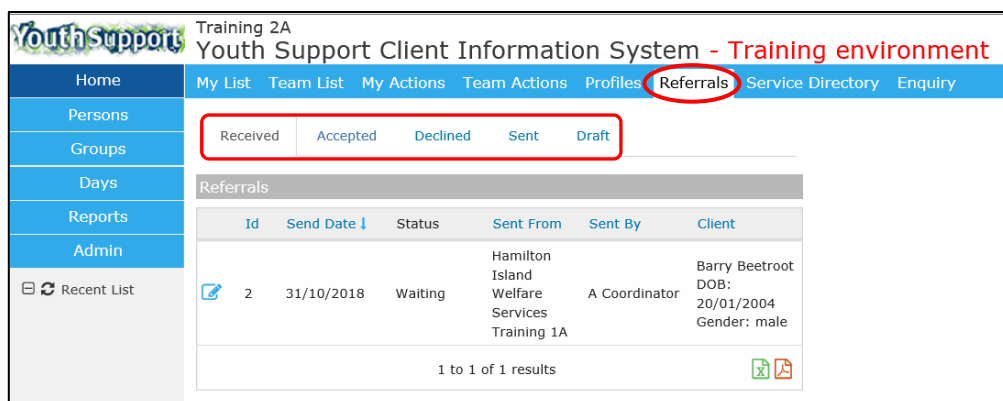
10.2 Receiving referrals from another service provider

Referrals received from other Youth Support services are managed from the **Home** page, **Referrals** tab.

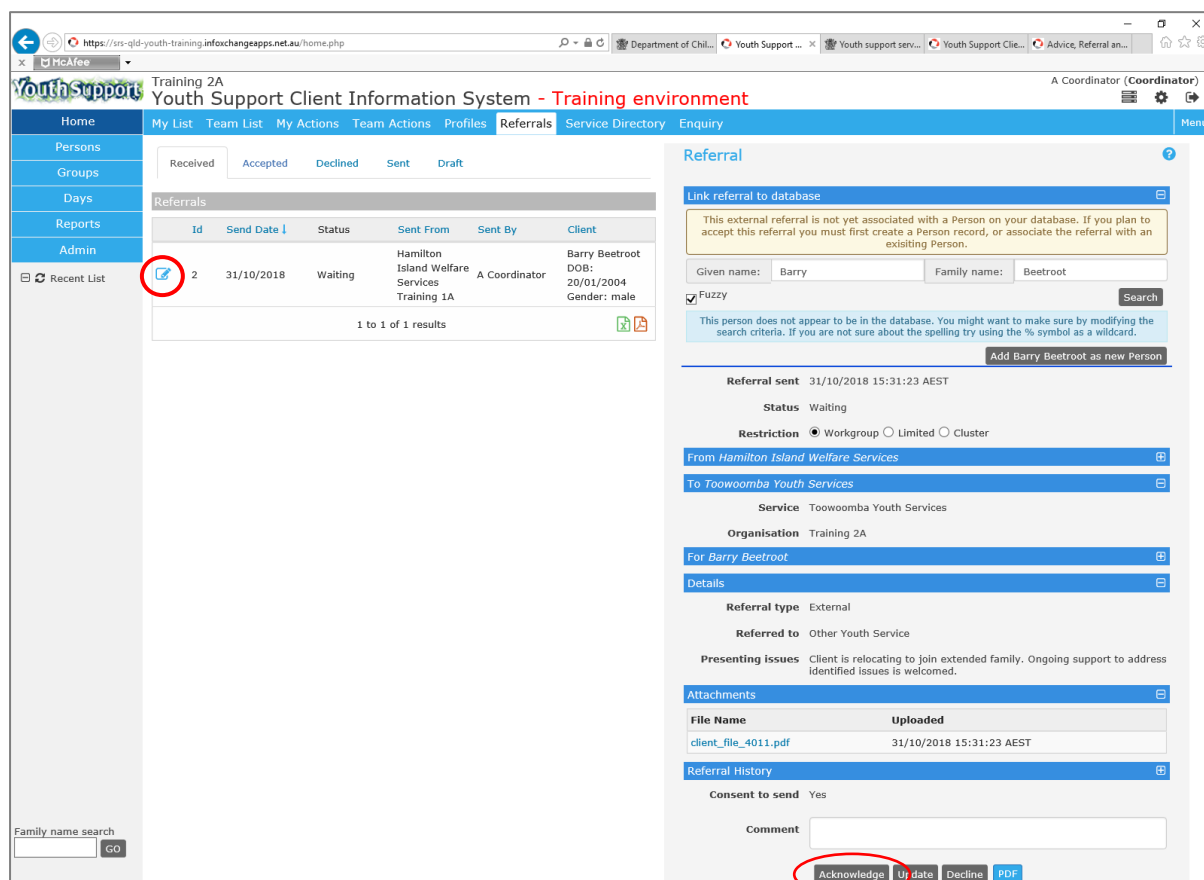
These referrals show on the **Received** sub-tab.

Referrals that have been Accepted, Declined, Sent or have yet to be sent (i.e. are in Draft format) can be viewed by clicking the relevant sub-tab.

1. From the **Home** page select **Referrals** tab



2. In the **Received** sub-tab, select the  icon to view/edit the details of the referral.



- Click **Acknowledge** at the bottom of the Referral form, to update the *Status* of the referral – indicating you are aware of and are processing this referral.

Training 2A
Youth Support Client Information System - Training environment

A Coordinator (Coordinator)

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

Received Accepted Declined Sent Draft

Referrals

Id	Send Date	Status	Sent From	Sent By	Client
2	31/10/2018	Acknowledged	Hamilton Island Welfare Services Training 1A	A Coordinator	Barry Beetroot DOB: 20/01/2004 Gender: male

1 to 1 of 1 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: Barry Family name: Beetroot

☒ Fuzzy

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

Add Barry Beetroot as new Person

Referral sent 31/10/2018 15:31:23 AEST

Status Acknowledged

Restriction ☒ Workgroup ☐ Limited ☐ Cluster

From Hamilton Island Welfare Services

- The procedures developed by your service to determine whether to *Accept* or *Decline* the referral occur at this point. A review of the [client_file](#) attached to the referral will inform this decision.

- To accept the referral**, as indicated by the message in the yellow box, it must be associated with a Person record.

It is important to perform a wide search to identify if a Person record already exists for the referred client: **use the % wildcard on a short version of the Given Name or Family Name**, click **Search**.

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: Family name: Be%

☒ Fuzzy

Search

First Name	Last Name	Gender	DOB
Charlotte	Bell	female	01/08/1999
Sophie	Bell	female	11/05/1954
Abigail	Bennett	female	01/08/1999

Add Barry Beetroot as new Person

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

Click the person icon to check the current record in your workgroup to confirm if it is the same person.

Note: you will need to navigate back to the **Home** page, **Referrals** tab to resume processing your referral (this may display is a separate tab in your browser).

Where a Person record already exists for the client in the referral, click the [link](#) icon.

6. If there is no existing Person record for the client, click **Add <Name> as a new Person**.

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: Family name: Be%

☒ Fuzzy Search

First Name	Last Name	Gender	DOB
Charlotte	Bell	female	01/08/1999
Sophie	Bell	female	11/05/1954
Abigail	Bennett	female	01/08/1999

Add Barry Beetroot as new Person

7. A blue message will display at the top of the referral form and a blue person icon will appear in the referral record to the left. You can click on this icon to open the Person record. Certain details will have been automatically populated in the record. You may like to include other information, where relevant, from the [client_file](#) (attached to the referral).

Youth Support Client Information System - Training environment

Home Persons Groups Days Reports Admin Recent List

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

Received Accepted Declined Sent Draft

Id	Sent Date	Status	Sent From	Sent By	Client
2	31/10/2018	Acknowledged	Hamilton Island Welfare Services Training 1A	A Coordinator	Barry Beetroot DOB: 20/01/2004 Gender: male

1 to 1 of 1 results

Referral

Client added to database

Referral sent 31/10/2018 15:31:23 AEST

Status Acknowledged

Restriction ☒ Workgroup ☐ Limited ☐ Cluster

From Hamilton Island Welfare Services

To Toowoomba Youth Services

Service Toowoomba Youth Services

Organisation Training 2A

8. You are now able to select the **Accept** button at the bottom of the referral form. This will update the *Status* of the referral.

Referral

Client added to database

Referral sent 31/10/2018 15:31:23 AEST

Status Acknowledged

Restriction ☒ Workgroup ☐ Limited ☐ Cluster

From Hamilton Island Welfare Services

To Toowoomba Youth Services

Service Toowoomba Youth Services

Organisation Training 2A

For Barry Beetroot

Details

Referral type External

Referred to Other Youth Service

Presenting issues Client is relocating to join extended family. Ongoing support to address identified issues is welcomed.

Attachments

File Name	Uploaded
client_file_4011.pdf	31/10/2018 15:31:23 AEST

Referral History

Consent to send Yes

Comment

Update **Accept** Decline PDF

9. The *Status* is updated in your workgroup and in the workgroup that sent you the referral.

The referral record is now located on the **Accepted** sub-tab of the **Referrals** tab (on the **Home** page) AND on the **Referrals** tab of the **Person** record.

Training 2A
Youth Support Client Information System - Training environment

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

Received Accepted Declined Sent Draft

Referrals

Id	Send Date ↓	Status	Sent From	Sent By	Client
No record to display					

Referral

Referral sent 31/10/2018 15:31:23 AEST

Status Accepted

Restriction ☒ Workgroup ☐ Limited ☐ Cluster

From Hamilton Island Welfare Services

To Toowoomba Youth Services

Service Toowoomba Youth Services

Organisation Training 2A

Training 2A
Youth Support Client Information System - Training env

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

Received Accepted Declined Sent Draft

Referrals

Id	Send Date ↓	Status	Sent From	Sent By	Client
2	31/10/2018	Accepted	Hamilton Island Welfare Services Training 1A	A Coordinator	Barry Beetroot DOB: 20/01/2004 Gender: male

To decline the referral:

If you are not going accept the referral, click **Decline** at the bottom of the referral form. You will be required to select a *Reason for declining* the referral

Please select a reason for declining this referral

OK

No capacity at this time
Does not meet eligibility requirements
Insufficient information to assess referral
Outside catchment area
Other reason for declining referral

Click **Decline** to save.

11 Working with more than one young person at a time

Youth Support service delivery is directed to ensuring that young people receive individualised support and assistance consistent with their assessed needs. However, there may be instances that young people are engaged in the company of other young people to provide a targeted response for common identified goals/actions within their respective plans.

YSCIS provides a functionality (**Groups** on the **Groups** page) to record occasions where a worker/workers are engaging with more than one young person when delivering a youth support service response. These responses should always involve at least two, if not more, young people who are clients of the service and for whom a client record and case profile are created. If only one client is contacted this would be an individual case note, not a group.

Examples of Group scenarios are outlined below:

Example 1

Four young people with case plans attend a 4 x 1 hour program on anger management delivered by two workers. Each session is captured using the **Group Notes** functionality, with the individual young people linked to it, so that the group case note appears in each client's record.

Total output hours equates to 4 direct contact hours for each worker. The group type in this instance would be captured relevant to the case type of the majority of clients participating whether 'support' or 'integrated response'. The individual persons receiving a service in the period is captured through the case profile, not the group functionality.

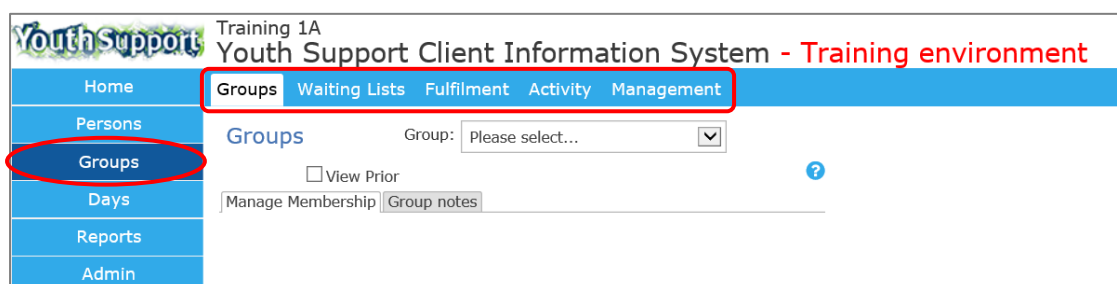
Example 2

Your service is aware that there are a number of disengaged and vulnerable young people regularly gathering at a local beach. Your service decides to outreach to location to engage these young people to facilitate their access to support. When in contact with the group of young people, three young people accept referral information/or offer of warm referral as access clients and one spends some time with one of the workers on the side sharing some challenges they are experiencing and accepting an offer of ongoing support.


This activity would be recorded in YSCIS as follows:

- Client/Person records would be created with Access profiles/cases for the 3 access clients.
- a Group for the *Outreach @ Beach* would be created and these 3 clients added as members of that Group
- A single Group Note would be recorded detailing what information was provided – this Note copies across to and is visible on each of the 3 Person records.
- A client and Support – Case management profile/case would be created for the young person who was contacted and accepted the offer of ongoing support. This would be recorded as an individual case note as they did not participate in the Group.

The **Groups** page contains **5** tabs:



- **Groups:** to manage group sessions delivered by your service. **Group Notes** are created for activities pertaining to the delivery of that group activity, recognising attendance and capturing worker time spent on these activities.
- **Waiting Lists:** to track clients who may be waiting for a particular service.
- **Fulfilment:** to create a mailing list of clients who share an interest or have expressed an interest in receiving particular information. You can also use this group type to create invitation lists for clients who share common demographic characteristics.
- **Activity:** to record activities that are not groups and/or do not involve client participation.
- **Management:** to create new Groups – retains a register of all items created.

Waiting Lists, Fulfilment and Activity are standard features from the Infoxchange SRS product. For guidance on using this functionality, click on the Help icon  to access SRS Help.

There are 3 steps to create and manage groups provided as part of service delivery with young people.

These are outlined in the following pages.

11.1 Create a New Group

1. From the **Groups** page, on the **Management** tab, click

New Group

Training 1A
Youth Support Client Information System - Train

Home Groups Waiting Lists Fulfilment Activity **Management**

Persons Management

Groups

Days

Reports

Admin

Recent List
Aaron Apple
Carl Carrot
Barry Beetroot

Groups
No current Groups

Waiting Lists
No current Waiting Lists

Fulfilment Lists
No current Fulfilment Lists

Activities
No current Activities

New Group

New Waiting List

New Fulfilment List

New Activity

2. Complete details on the **Edit Group** form and click **Save**.

Edit Group

* Group / List Name

Sub Group

Description

Nominal Length min

Set Individual Nominal Length ☒ Yes ☐ No

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

Track Attendance ☐ Yes ☒ No

Enable Case Profiles ☐ Yes ☒ No

Count Others ☐ Yes ☒ No

* Start Date

End Date

* Current group? ☒ Yes ☐ No

Last update

- *Group / List Name* is the name of your group sessions/program.
- *Description* is used to record the purpose / scope of the group sessions.
- *Nominal Length* is not a mandatory field. If a value is entered here, it will pre-populate the Contact time field on the Group Note template for this group.
It is recommended that this field is left blank.
- *Set Individual Nominal Length* should be set as '**No**' to ensure accuracy of recording service hours.
- *Maximum Number* can be used to help manage the number of participants in the group - selecting this will provide messages. It does not limit adding members

- *Track Attendance* – if 'Yes' is selected, a brief *Attendance Note* will display on the Membership tab for each Person record listed as a member of the Group. Please refer to **What does Track Attendance do?** section below to inform your choice.
- *Enable Case Profiles* – select 'No'.
- *Count Others* – select 'No'. If 'Yes', a box will appear to record the number of non-clients who attend a session to be recorded.
- *Start Date* – defaults to today's date – when this Group record was created in ARC.
- *Current group?* – defaults to 'Yes'.
- Click **Save**.

Training 1A
Youth Support Client Information System - Training environment

A Coordinator (Coordinator)

Home Groups Waiting Lists Fulfilment Activity Management Menu

Management

Groups

Program Group Start Date

Managing your anger 01/11/2018

Waiting Lists

No current Waiting Lists

Fulfilment Lists

No current Fulfilment Lists

Activities

No current Activities

Recent List
Aaron Apple
Carl Carrot
Barry Beetroot

Family name search
GO

Edit Group

Group successfully created

* Group / List Name Managing your anger

Sub Group

Description Four-session program : identifying triggers and enlisting strategies for managing responses

Nominal Length min

Set Individual Nominal Length ☐ Yes ☒ No

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

Track Attendance ☐ Yes ☒ No

Enable Case Profiles ☐ Yes ☒ No

Count Others ☐ Yes ☒ No

* Start Date 01/11/2018

End Date

Attachments **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.

* Current group? ☒ Yes ☐ No

Last update A Coordinator 01/11/2018 12:07:20

Save


Additional Notes:

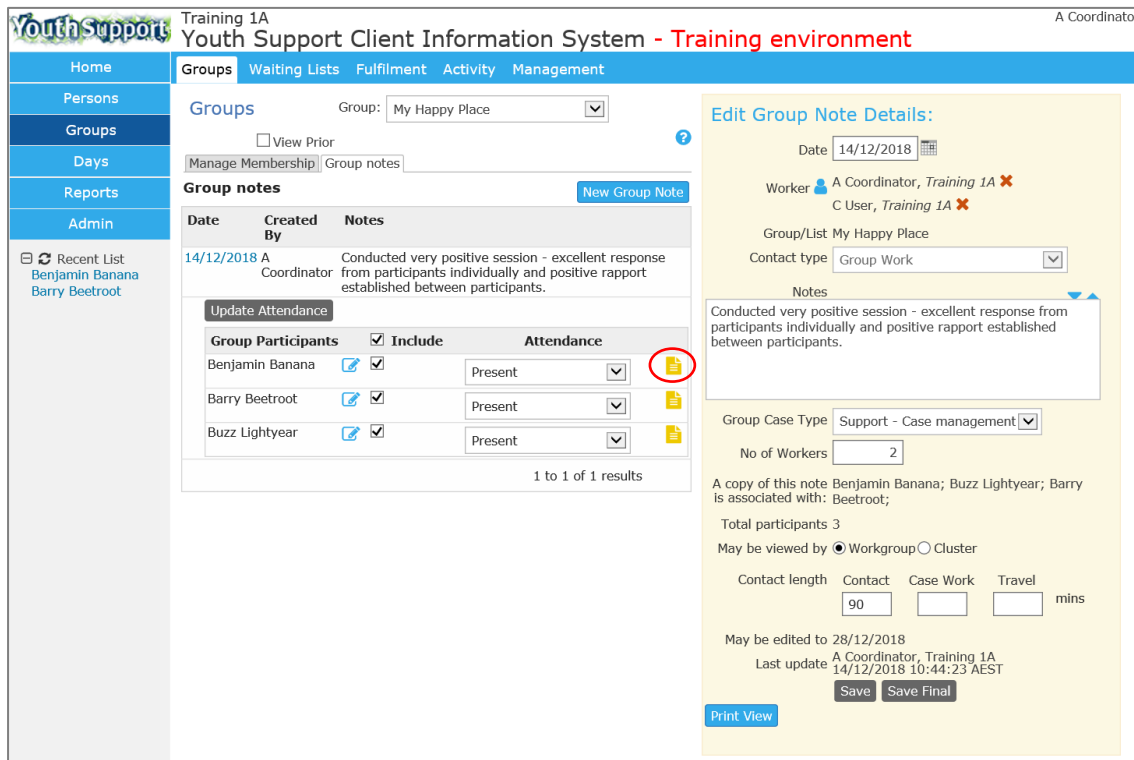
- You only need to create one Group template for sessions that are held on a regular basis. Individual Group Notes for that Group will record each session that is held and other activities undertaken in association with that Group.
- You are able to edit/update the details of each Group from this tab, at any subsequent time.
- Any relevant documents are able to be attached to the Group template.
- A Group will remain active until it is closed. This is achieved by recording an End Date in the Group template (this will auto-update Current group? To No). The record remains accessible via the View Prior button.

What does Track Attendance do?

Track Attendance is standard SRS functionality.

Where **Track Attendance** is selected as Yes (when creating the Group), an *Attendance Note* is created for all Group Notes recorded for that Group.

On the **Group Notes** sub-tab, the  icon links to the [Attendance Note](#) that has been created.



Training 1A
Youth Support Client Information System - Training environment

A Coordinator

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Recent List Benjamin Banana Barry Beetroot

Groups Group: My Happy Place

View Prior Manage Membership Group notes

Group notes New Group Note

Date	Created By	Notes
14/12/2018	A Coordinator	Conducted very positive session - excellent response from participants individually and positive rapport established between participants.

Update Attendance

Group Participants	Include	Attendance
Benjamin Banana	<input checked="" type="checkbox"/>	Present
Barry Beetroot	<input checked="" type="checkbox"/>	Present
Buzz Lightyear	<input checked="" type="checkbox"/>	Present

1 to 1 of 1 results

Edit Group Note Details:

Date: 14/12/2018

Worker: A Coordinator, Training 1A C User, Training 1A

Group/List: My Happy Place

Contact type: Group Work

Notes: Conducted very positive session - excellent response from participants individually and positive rapport established between participants.

Group Case Type: Support - Case management

No of Workers: 2

A copy of this note Benjamin Banana; Buzz Lightyear; Barry is associated with: Beetroot;

Total participants: 3

May be viewed by: Workgroup Cluster

Contact length: 90 mins

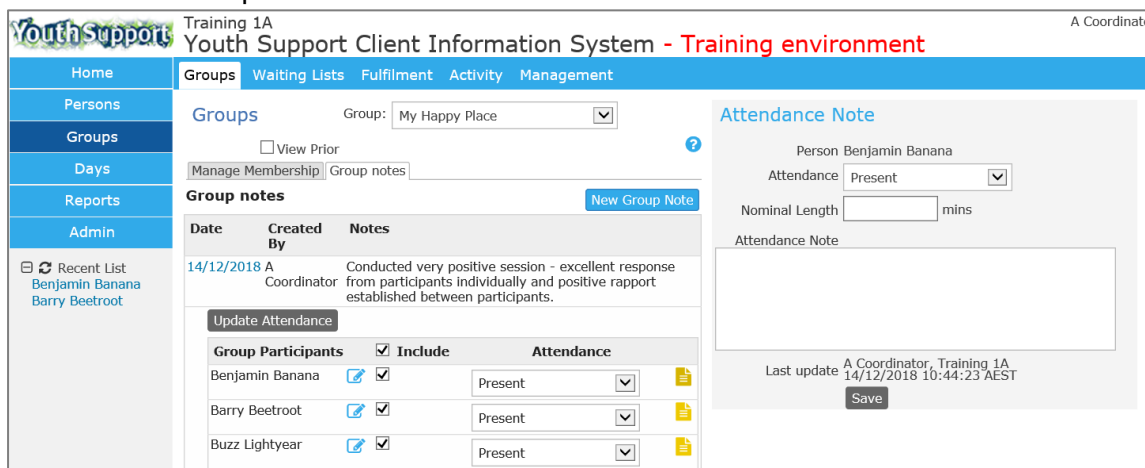
May be edited to: 28/12/2018

Last update: A Coordinator, Training 1A 14/12/2018 10:44:23 AEST

Save Save Final

Print View

Click this icon to open the [Attendance Note](#) for that Person.



Training 1A
Youth Support Client Information System - Training environment

A Coordinator

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Recent List Benjamin Banana Barry Beetroot

Groups Group: My Happy Place

View Prior Manage Membership Group notes

Group notes New Group Note

Date	Created By	Notes
14/12/2018	A Coordinator	Conducted very positive session - excellent response from participants individually and positive rapport established between participants.

Update Attendance

Group Participants	Include	Attendance
Benjamin Banana	<input checked="" type="checkbox"/>	Present
Barry Beetroot	<input checked="" type="checkbox"/>	Present
Buzz Lightyear	<input checked="" type="checkbox"/>	Present

Attendance Note

Person: Benjamin Banana

Attendance: Present

Nominal Length: mins

Attendance Note:


Last update: A Coordinator, Training 1A 14/12/2018 10:44:23 AEST

Save

Enter any comments .Click **Save**.

The screenshot shows the 'Groups' page in the Youth Support Client Information System. The left sidebar contains navigation links: Home, Persons, Groups, Days, Reports, and Admin. The main content area is titled 'Groups' and shows a dropdown for 'Group: My Happy Place'. Below this, there are tabs for 'Manage Membership' and 'Group notes'. The 'Group notes' section displays a table with columns 'Date', 'Created By', and 'Notes'. A note is visible for '14/12/2018 A Coordinator' with the text 'Conducted very positive session - excellent response from participants individually and positive rapport established between participants.' Below the notes, there is an 'Update Attendance' button and a table for 'Group Participants' with columns 'Include' and 'Attendance'. The table lists 'Benjamin Banana', 'Barry Beetroot', and 'Buzz Lightyear', all with 'Present' attendance. On the right, the 'Attendance Note' section shows 'Person: Benjamin Banana', 'Attendance: Present', and 'Nominal Length' in minutes. It also contains a text area for the 'Attendance Note' and a 'Save' button.

The Nominal Length field does not record your time. It is recommended this is left blank.

On the **Person** record, **Membership** tab, the *View Attendance record* icon  will appear for those groups where it was set-up.

An Attendance Note will appear for **ALL** Group Notes created, not just for those the Person attended.

The screenshot shows the 'Person' record for 'Benjamin Banana' in the Youth Support Client Information System. The left sidebar contains navigation links: Home, Persons, Groups, Days, Reports, and Admin. The main content area is titled 'Benjamin Banana Male, DOB: 01/05/1999 (Age 19 yrs)'. Below this, there are tabs for 'Search', 'Details', 'Notes', 'Payments', 'Alerts', 'Consent', 'Referrals', 'Plans', 'Tasks', 'Outcomes', 'Documents', and 'Membership'. The 'Membership' tab is selected and circled in red. It shows a table for 'Groups' with columns 'Program', 'Program Group', 'Comments', and 'Registered'. A group 'My Happy Place' is listed with a 'Registered' date of '14/12/2018' and an 'Attendance record' icon circled in red. Below the groups, there are sections for 'Waiting Lists' and 'Fulfillments', both showing 'Not currently on a waiting membership list' and 'Not currently on a fulfillment membership list' respectively. On the right, the 'Attendance Notes' section shows a table with columns 'Date', 'Participation', and 'Attendance Note'. It lists two notes: one for '14/12/2018 Present' and another for '28/11/2018 Absent without notice'.

Services need to assess the value of this.

If Track Attendance is set to 'No' (when the Group is created), the *Attendance Notes* icon does not appear on the Membership tab for each member. A copy of the Group Note where *Update attendance* is recorded **is** copied to the relevant Person record.

Please refer to **Record a Group Note** section (Section 11.3) below for more information.

11.2 Add a Client to a Group

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

Training 1A
Youth Support Client Information System - Training environment

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Group: Please select...
Managing your anger
Outreach@Sunrise Beach

View Prior ?

Manage Membership Group notes

Group Members

List empty

Add Person to Group

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

Training 1A
Youth Support Client Information System - Training environment

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Group: Managing your anger

View Prior ?

Manage Membership Group notes

Group Members

List empty

Add Person to Group

Search for person to add to group/list:

Given Name
Family Name beet%

Sex ☐ Male ☐ Female

Fuzzy ☒

Go Clear

Results

Given Name	Family Name	Gender	DOB	Match
Barry	Beetroot	male	20/01/2004	4

Add new Person

ADD

3. Add any comments, if relevant, and click **Save**

Training 1A
Youth Support Client Information System - Training environment

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Group: Managing your anger

View Prior ?

Manage Membership Group notes

Group Members

Add Person to Group

#	Given Name	Family Name	Registered	Edit Membership	Remove
1	Barry	Beetroot	01/11/2018	Edit Membership	Remove <input checked="" type="checkbox"/>

With selected persons

Print Mail Labels

Unistat 38933 (3 x 8)

Mail Merge Export

Exclude absent addresses ☒

Group Membership

Person Barry Beetroot

Group: Managing your anger

Comments

Registered 01/11/2018

Remove from list? ☐ Yes ☒ No

Last update A Coordinator 01/11/2018 12:24:34 AEST

Save

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

Training 1A
Youth Support Client Information System - Training environment

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Group: Managing your anger

View Prior ?

Manage Membership Group notes

Group Members

Add Person to Group

#	Given Name	Family Name	Registered	Edit Membership	Remove
1	Aaron	Apple	01/11/2018	Edit Membership	Remove <input checked="" type="checkbox"/>
2	Barry	Beetroot	01/11/2018	Edit Membership	Remove <input checked="" type="checkbox"/>
3	Carl	Carrot	01/11/2018	Edit Membership	Remove <input checked="" type="checkbox"/>

To remove a client from a Group, simply click **Remove**.

11.3 Record a Group Note

Activities performed in delivering group sessions are recorded using the **Group Note** feature.

1. On the **Groups** tab, select the required group from the drop down list.
2. Select the **Group notes** sub-tab. Click **New Group Note**

The screenshot displays the 'Youth Support Client Information System - Training environment'. The left sidebar contains navigation links: Home, Persons, Groups, Days, Reports, and Admin. The main content area is divided into two sections. The top section, 'Groups', shows a dropdown menu for 'Managing your anger' and a 'Group notes' sub-tab. The bottom section, 'Group notes', includes an 'Update Attendance' button and a table for 'Group Participants' with columns for 'Date', 'Created By', and 'Notes'. The right panel, 'Edit Group Note Details', contains fields for 'Date' (01/11/2018), 'Worker' (A Coordinator, Training 1A), 'Group/List' (Managing your anger), 'Contact type' (Group Work), 'Notes' (a text area), 'Group Case Type' (Please select...), 'No of Workers' (1), 'A copy of this note is associated with: No persons selected', 'Total participants 0', 'May be viewed by' (Workgroup selected), 'Contact length' (Contact, Case Work, Travel), and 'May be edited to 15/11/2018'. There are 'Save' and 'Save Final' buttons at the bottom.

3. Complete the fields as relevant:
 - record the **Date** of the activity
 - Add other workers if involved in the activity – click on blue person icon

This screenshot shows the 'Additional workers' section of the 'Edit Group Note Details' form. It includes a 'Workgroup' dropdown menu set to 'Training 1A', a 'Worker' dropdown menu set to 'Please select...', and a 'Role' text input field. There are 'Add' and 'Close' buttons at the bottom of this section.

- record Notes
- to record attendance, click the checkbox for 'Include' for each client and then click **Update Attendance**. Their names are now attached to this Group Note.
- select Group Case Type
- record the number of workers (see notes for Counting Rules below)
- record activity time for Contact, Case Work and Travel as relevant.
- click **Save**.

Training 1A Youth Support Client Information System - Training environment A Coordinator

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Groups Group: Managing your anger View Prior Manage Membership Group notes New Group Note

Group notes

Date	Created By	Notes
01/11/2018	A Coordinator	The format of this session was very effective with the participants - very engaged. Activities were really effective. They are all looking forward to practising their new skills..and the next session.

Update Attendance

Group Participants	Include
Aaron Apple	<input checked="" type="checkbox"/>
Barry Beetroot	<input checked="" type="checkbox"/>
Carl Carrot	<input checked="" type="checkbox"/>

1 to 1 of 1 results

Edit Group Note Details:

Date: 01/11/2018

Worker: A Coordinator, Training 1A K User, Training 1A

Group/List: Managing your anger

Contact type: Group Work

Notes: The format of this session was very effective with the participants - very engaged. Activities were really effective. They are all looking forward to practising their new skills..and the next session.

Group Case Type: Support - Case management

No of Workers: 2

A copy of this note is associated with: Barry Beetroot; Carl Carrot; Aaron Apple;

Total participants: 3

May be viewed by: Workgroup Cluster

Contact length: Contact 60 Case Work 30 Travel mins

May be edited to: 15/11/2018

Last update: A Coordinator, Training 1A 01/11/2018 12:49:22 AEST

Save Save Final Print View

Additional Notes:

- » A copy of the Group Note will be added to each client's record where they were marked as 'in attendance'.

This can be accessed by clicking the blue crayon  or from the Person page, Notes tab.

Training 1A Youth Support Client Information System - Training environment A C

Home Groups Waiting Lists Fulfilment Activity Management

Persons Groups Days Reports Admin

Groups Group: My Happy Place View Prior Manage Membership Group notes New Group Note

Group notes

Date	Created By	Notes
14/12/2018	A Coordinator	Conducted very positive session - excellent response from participants individually and positive rapport established between participants.

Update Attendance

Group Participants	Include	Attendance
Benjamin Banana	<input checked="" type="checkbox"/>	Present
Barry Beetroot	<input checked="" type="checkbox"/>	Present
Buzz Lightyear	<input checked="" type="checkbox"/>	Present

Edit Group Note Details:

Date: 14/12/2018

Worker: A Coordinator, Training 1A C User, Training 1A

Group/List: My Happy Place

Contact type: Group Work

Notes: Conducted very positive session - excellent response from participants individually and positive rapport established between participants.

Group Case Type: Support - Case management

The copy of the Group Note for that Person will open on the right hand side of the screen, in a gray template. (The Group Note displays in a yellow template.)

Groups Group: My Happy Place ☐ View Prior

Group notes [New Group Note](#)

Date	Created By	Notes
14/12/2018	A Coordinator	Conducted very positive session - excellent response from participants individually and positive rapport established between participants.
Group Participants		
	Benjamin Banana	<input type="checkbox"/> <input checked="" type="checkbox"/>
	Barry Beetroot	<input type="checkbox"/> <input checked="" type="checkbox"/>
	Buzz Lightyear	<input type="checkbox"/> <input checked="" type="checkbox"/>
28/11/2018	A Coordinator	Spent time collating material for the next session

1 to 2 of 2 results

Edit Note Details

Person Barry Beetroot

Date 14/12/2018

* Worker/s A Coordinator, Training 1A ✗
C User, Training 1A ✗

* Contact type Group Work

Group/List My Happy Place

* Notes
Conducted very positive session - excellent response from participants individually and positive rapport established between participants.

Group Case Type Support - Case management

* Contact length Contact Case Work Travel
90 mins

May be edited to 28/12/2018

Last update A Coordinator, Training 1A
14/12/2018 10:44:23 AEST

[Save](#) [Delete](#) [Save Final](#)

[Print View](#)

That Note is also able to be accessed from the Person record, Notes tab :

Youth Support Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

[Home](#) [Search](#) [Details](#) **Notes** [Payments](#) [Alerts](#) [Consent](#) [Referrals](#) [Plans](#) [Tasks](#) [Outcomes](#) [Documents](#) [Membership](#)

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

Date	Worker / Type	Notes
14/12/2018	A Coordinator Group Work	Conducted very positive session - excellent response from participants individually and positive rapport established between participants.
14/12/2018	A Coordinator Case Panel Meeting	Very constructive meeting held. Immediate actions identified and agreed by all parties. Follow-up meeting to be scheduled for next week.
02/10/2018	A Coordinator Telephone/Virtual	discussed concerns

- » The Group Note counts service hours for performance reporting.
By way of example, for the Group Note below, 2 workers facilitated a session attended by 3 clients for 90min (1.5hrs)

Edit Group Note Details:

Date: 14/12/2018

Worker: A Coordinator, Training 1A ✗
C User, Training 1A ✗

Group/List: My Happy Place

Contact type: Group Work

Notes: Conducted very positive session – excellent response from participants individually and positive rapport established between participants.

Group Case Type: Support - Case management

No of Workers: 2

A copy of this note Benjamin Banana; Buzz Lightyear; Barry is associated with: Beetroot;

Total participants: 3

May be viewed by: ☒ Workgroup ☐ Cluster

Contact length: Contact: 90 Case Work: Travel: mins

May be edited to: 28/12/2018
Last update: A Coordinator, Training 1A
14/12/2018 10:44:23 AEST

Save Save Final

Print View

The *DCSYW Performance Report* recognises the time for **both** workers for the relevant service type.

Outputs				
Service Type No.	Service Type Name	Measure No.	Measure Name	Response
T103	Access – Information, Advice and Referral	A01.1.06	Number of hours provided during the reporting period	
T103	Access – Information, Advice and Referral	A01.1.06	Number of Service Users who received a service during the reporting period	0
T314	Support – Case management	A01.2.02	Number of hours provided during the reporting period	3.00
T314	Support – Case management	A01.2.02	Number of Service Users who received a service during the reporting period	3

12 Closing a Case

With the completion of your work with the young person, their case/profile must be closed.

Closing a case involves the following 4 steps:

- » Close **Consent**
- » Close the **Case Plan**
- » Close the **Key Worker**. This avoids the client appearing in the worker's 'My List' on the Home page
- » Close the **Case Profile**.

12.1 Close Consent

1. From the **Persons** page, select **Consent** tab.
2. Open the Consent record (by clicking on the **blue date**) – enter **End Date** and **Save**.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

A Coordinator (Coordinator)

Home Search Details Notes Payments Alerts **Consent** Referrals Plans Tasks Outcomes Documents Membership Menu

Persons **Consents** Filter Create New Consent

Start Date	End Date	Worker	Type
08/10/2018		A Coordinator	

Export Consents 1 to 1 of 1

Recent List
Barry Beetroot
Aaron Apple
Carl Carrot

Edit Consent Details

* Worker/s A Coordinator, Training 1A

Start date 08/10/2018

Review date 30/10/2018

End Date 01/11/2018

I acknowledge that the organisation has advised me about:
☒ some information will be recorded about me so that a service can be provided
☒ I have the right to privacy and confidentiality

The Consent record is saved as a Prior Record – simply click the **View Prior** button to display / access.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

A Coordinator (Coordinator)

Home Search Details Notes Payments Alerts **Consent** Referrals Plans Tasks Outcomes Documents Membership Menu

Persons **Consents** Filter Create New Consent **View Prior**

No current Consents to display

Prior Consents

Start Date	End Date	Worker	Type
08/10/2018	01/11/2018	A Coordinator	

Export Consents 1 to 1 of 1

Recent List
Barry Beetroot
Aaron Apple

Edit Consent Details

* Worker/s A Coordinator, Training 1A

Start date 08/10/2018

Review date 30/10/2018

End Date 01/11/2018

I acknowledge that the organisation has advised me about:
☒ some information will be recorded about me so that a service can be provided

12.2 Close the Case Plan

1. From the **Persons** page, **Plans** tab, open the current Plan.
2. Review Actions to ensure accurately updated.
Enter a **Close date** for the Plan. Click **Save**

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

A Coordi

Home Search Details Notes Payments Alerts Consent Referrals **Plans** Tasks Outcomes Documents Membership

Persons Plans Filter Create New Plan View Prior

Groups

Days No current Plans to display

Reports

Admin

Recent List
Barry Beetroot

Export Plans

1 to 1 of 1

Date ↑	Review Date	Worker	Close Date	Description
10/10/2018		A Coordinator	01/11/2018	Support Plan

12.3 Close the Key Worker

- From the **Persons** page, **Details** tab, open the **Edit Key Worker** form.
- Enter an **End Date** (or click No to 'Current Key Worker?' – this auto-populates the end Date) Click Save.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

A Coordinator (Coordinator)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership Menu

Persons View Primary Details Create new alias

Groups

Days

Reports

Admin

Recent List
Barry Beetroot
Aaron Apple
Carl Carrot

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Brian Beetroot	Father	02/06/1985	

Profiles: Create new profile

Profile Type	Workgroup	Start	Last Update
Support - Case management	Training 1A	31/10/2018	01/11/2018

Address: Create new address

Street	Locality	Type	Comments	Last Update
35 Beverley Drive	CAIRNS QLD 4870	Home		01/11/2018

Phone & other contacts: Create new econtact

Contact	Type	Comments	Last Update
Baz @ Beetroot	Facebook		01/11/2018

Key Workers: Create new key worker

Worker	Workgroup	Role	Comments
A Coordinator	Training 1A		

Export Details Refresh

Edit Key Worker:

Key Worker: A Coordinator

Workgroup: Training 1A

Role:

Comments:

May be viewed by ☐ Workgroup ☒ Cluster

Start Date: 08/10/2018

End Date:

Current Key Worker? ☐ Yes ☒ No

Last update: A Coordinator 01/11/2018 13:26:08 AEST

Save Delete

The record is available as a Prior record – accessed by clicking on **View Prior**.

Key Workers: Create new key worker View Prior

No currently assigned key workers

Previous key workers

Worker	Workgroup	Role	Comments
A Coordinator	Training 1A		

12.4 Close the Case / Profile

1. From the **Persons** page, **Details** tab, open the current Case/Profile.
2. Click the **Closure** sub-tab.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons Groups Days Reports Admin

Recent List
Barry Beetroot
Aaron Apple
Carl Carrot

View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Brian Beetroot	Father	02/06/1985	

Profiles: Create new profile

Profile Type	Workgroup	Start	Last Update
Support - Case management	Training 1A	31/10/2018	01/11/2018

Support - Case management

Service User Referral Closure

Close Date

Closure Reminder: Consent must be closed.

Reason for exit Please select...

Last update A Coordinator, Training 1A
01/11/2018 11:11:25 AEST

Print View Save Delete Copy

3. Enter a **Close Date** and select *Reason for exit* from the drop down list. Click **Save**.

Support - Case management

Service User Referral Closure

Close Date

Closure Reminder: Consent must be closed.

Reason for exit Please select...

Last update

Print View

Majority of needs/ plan goals met
Lost contact / client moved away
Client declined further support
Referred to another service
Transitioning to other service type
Deceased
Other

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

Search Details Notes Payments Alerts Consent Referrals Plans

View Primary Details

Person / Alias: Create new alias

Name	Primary/Alias	Comments
Barry Beetroot	Primary Name	

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Brian Beetroot	Father	02/06/1985	

Profiles: Create new profile View Prior

No current profiles exist

Prior profiles

Profile Type	Workgroup	Start	End
Support - Case management	Training 1A	08/10/2018	01/11/2018

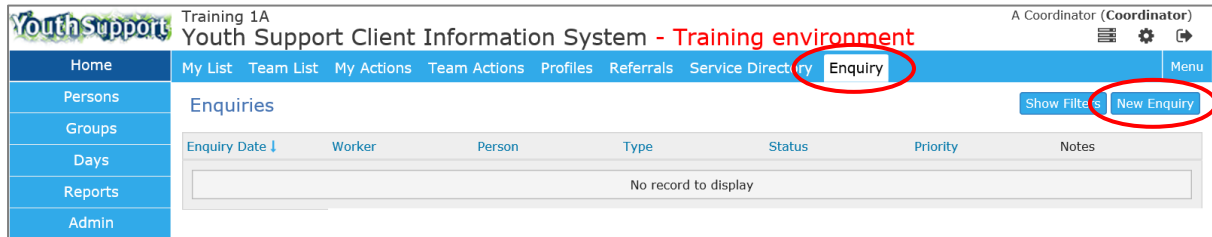
The Case / Profile record is saved as a Prior Record – simply click the **View Prior** button to display / access.

13 Enquiries

YSCIS allows workers to record simple light touch enquiries via the **Enquiry** Tab on the **Home** Page where the response does not warrant the creation of an Access case, or where the client is not eligible for service (e.g. outside age range).

If an enquiry and the work generated by an enquiry progress past 60 minutes, cancel the Enquiry and create a client record with a Case Type.

1. From the **Home** Page select the **Enquiry** tab.
To create a new enquiry, select **New Enquiry**.



Training 1A
Youth Support Client Information System - Training environment

A Coordinator (Coordinator)

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

Persons Enquiries Show Filter **New Enquiry**

Groups

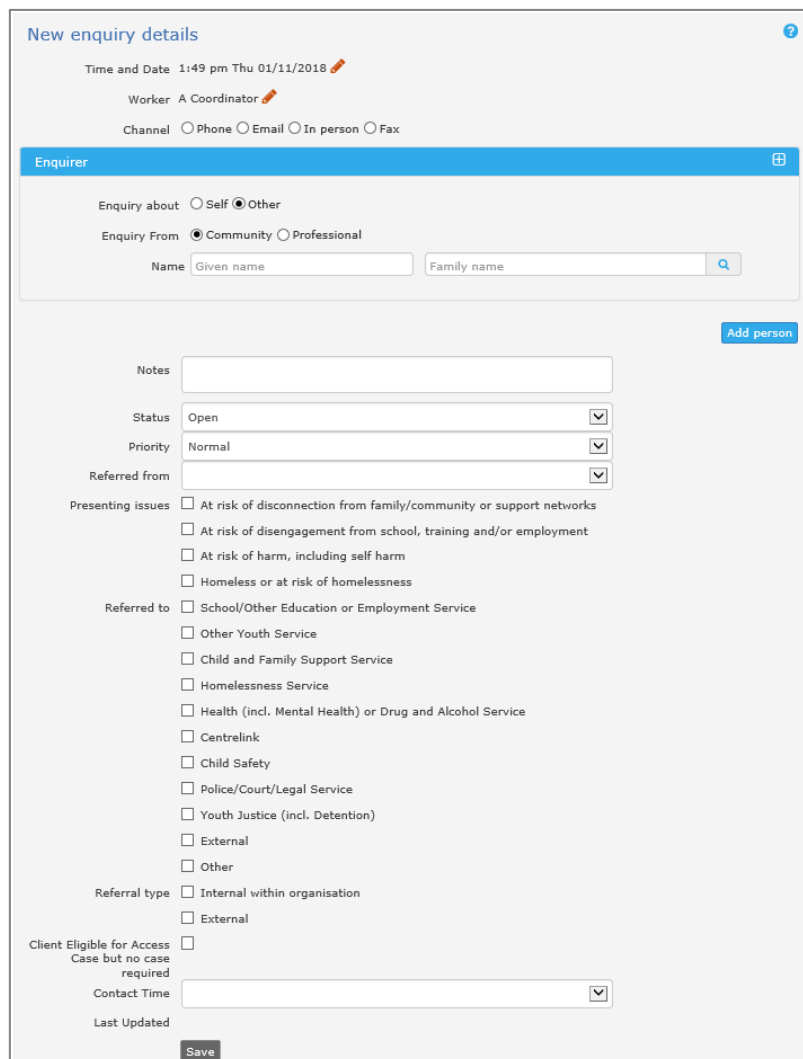
Days

Reports

Admin

Enquiry Date	Worker	Person	Type	Status	Priority	Notes
No record to display						

2. The **New enquiry details** form will open.



New enquiry details

Time and Date 1:49 pm Thu 01/11/2018

Worker A Coordinator

Channel ☐ Phone ☐ Email ☐ In person ☐ Fax

Enquirer

Enquiry about ☐ Self ☒ Other

Enquiry From ☒ Community ☐ Professional

Name Given name Family name

Add person

Notes

Status Open

Priority Normal

Referred from

Presenting issues ☐ At risk of disconnection from family/community or support networks
☐ At risk of disengagement from school, training and/or employment
☐ At risk of harm, including self harm
☐ Homeless or at risk of homelessness

Referred to ☐ School/Other Education or Employment Service
☐ Other Youth Service
☐ Child and Family Support Service
☐ Homelessness Service
☐ Health (incl. Mental Health) or Drug and Alcohol Service
☐ Centrelink
☐ Child Safety
☐ Police/Court/Legal Service
☐ Youth Justice (incl. Detention)
☐ External
☐ Other


Referral type ☐ Internal within organisation
☐ External

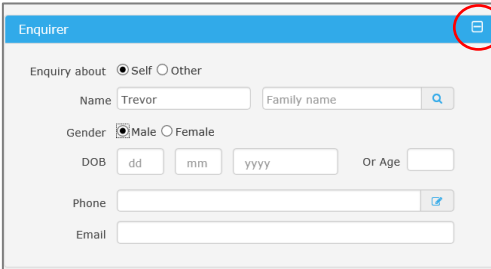
Client Eligible for Access Case but no case required ☐

Contact Time

Last Updated

Save

3. Enter details about the Enquirer. If you have a name you can enter it here however it is not mandatory to have a name. Other identifying details can be added by clicking on the  button highlighted in the screenshot below.



4. Refer additional notes for information on adding a person or linking to an existing client
5. In **Notes**, record relevant details
6. Select relevant **Status**, either Open (new), Responding (in progress, this would be used if you need to step away from your computer for a time) or Closed (finalised/complete)
7. Select the **Priority** and record where the client was **Referred from**
8. Record the **Presenting Issues** (multi-select available)
9. Record where the client was **referred to** (multi-select available) and whether this was a referral internal within the organisation or to an external provider/source (multi-select available, refer additional notes)
10. If the client is eligible for an Access Case but no case is to be created (e.g. the support provided via the enquiry was sufficient) then check the **Client Eligible for Access case but no case required checkbox**, this is ensure they are picked up in performance reporting
11. Record a **contact time** from the list of values. If the contact time exceeds 60 minutes, the enquiry should be cancelled and a case created for the person.
12. Click **Save**.

Additional Notes:

- » To cancel an Enquiry before it is saved, simply click the Home page.
- » You can create a Person record from the Enquiry if you wish. If you are going to create a case for the client cancel the enquiry and follow the steps in the section [Add a person](#)
- » Where you are referring a young person to both an Internal (within Organisation) and External service provider, these can be recorded on the same Enquiry. This will feed into the *DCSYW Performance Report* for your service, specifically IS148 & IS149


14 Tasks and Alerts

14.1 Create a Task

A task is an action, generated from a client record which is assigned to a worker within your workgroup. Tasks will display on the workers **My Actions** tab on the **Home** page. Tasks can be sent to Outlook.

1. On the **Person page**, (the client record), select the **Tasks** tab. Click **Create New Task**.

The screenshot shows the 'Youth Support' system interface. At the top, it displays 'Training 1A' and 'Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)'. The user is logged in as 'A Coordinator (Coordinator)'. The 'Tasks' tab is selected, and the 'Create New Task' button is highlighted with a red circle. The 'Edit Task Details' form on the right includes fields for 'Task date', 'Start time', 'End time', 'Worker/s' (set to 'A Coordinator, Training 1A'), 'Task type' (a dropdown menu), 'Notes', 'Send to calendar' (radio buttons for Yes/No), 'Created' (01/11/2018), 'Completed/Closed' (a date field), and 'Last update'. A 'Save' button is at the bottom right of the form.

2. Enter **Task date** and time
3. Select Worker/s. Will default to current user, to add more workers select the  icon
4. Select **Task type** and add any comments.

The screenshot shows the 'Task type' dropdown menu with the following options: Follow Up, Appointment, Planning, Review, and Case Planning Meeting.

5. 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. The comments field is the only information sent to the Outlook invite. No other data is included in the invite. For this reason, users wanting to send the task to Outlook may decide to include information in the comments field which will also be relevant in the invite.
6. Enter completed/closed date if applicable and select **Save**. 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

Start time

End time

* Worker/s A Coordinator Training 1A ✖
K User Training 1A ✖

* Task type

Notes

Send to calendar ☒ Yes ☐ No

Created 01/11/2018

Completed/Closed

Last update

Save

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

Training 1A
 Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

A Coordinator (Coordinator)

Home Search Details Notes Payments Alerts Consent Referrals Plans **Tasks** Outcomes Documents Membership Menu

Persons Groups Days Reports Admin

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

Action Date	Start/End	Worker	Task
01/11/2018	3:00 pm	A Coordinator	Appointment
30/10/2018		A Coordinator	Planning Internal Case review

8. Tasks can be viewed in different formats/presentations by selecting the **Day**, **Week** or **Month** buttons (highlighted below)

Training 1A
 Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)

A Coordinator (Coordinator)

Home Search Details Notes Payments Alerts Consent Referrals Plans **Tasks** Outcomes Documents Membership Menu

Persons Groups Days Reports Admin

Tasks **Filter** **List View** **Create New**

Today < >

November 2018

Day **Week** **Month**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
		Planning		3:00 pm Appointment		
4	5	6	7	8	9	10

Additional Notes:

- » Once a Task has been completed, enter the date in the **Completed/Closed** field using the calendar icon. This must be done to stop the record appearing on your **My Actions** tab.
- » You can filter the tasks list by clicking **Filter** and selecting the date range, type or worker.
- » A user with YSCIS Coordinator access level is able to delete a task record.

14.2 Create Alerts

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

1. From the **Persons** Page, select the **Alerts** tab
2. Select **Create New Alert**

The screenshot shows the YouthSupport interface for a user named Barry Beetroot. The 'Alerts' tab is selected, and the 'Create New Alert' button is highlighted with a red circle. The interface includes a sidebar with navigation options (Home, Persons, Groups, Days, Reports, Admin) and a main content area with tabs for Search, Details, Notes, Payments, Alerts, Consent, Referrals, Plans, Tasks, Outcomes, Documents, and Membership. The 'Alerts' tab shows a list of alerts (currently empty) and a 'Create New Alert' button. The 'Edit Alert Details' form is visible on the right, showing fields for Date, Worker/s, Alert type, Details, Review date, Expiry date, and Last update. The 'Alert type' dropdown is open, showing categories like Safety, Health, Legal, and Other.

3. Enter **Date** of Alert. This auto-populates to today's date - can be backdated.
4. **Worker/s** - defaults to the user entering the alert record.
5. Select the **Alert type**
6. Enter **Details** of Alert
7. Enter a **Review date** (this will cause a task to appear in the worker's **My Actions** tab when due) – this auto-populates to a 3-month period.
8. Enter an **Expiry date** (this will cause a task to appear in the worker's **My Actions** tab when due) – this auto-populates to a 6-month period.
9. Select **Save**. To modify the Alert, select the Alert from the list screen and update as required then select **Save**.
10. Once you create an alert, a warning icon will appear next to the person's name (highlighted above). The icon will be **red** if the alert relates to safety and **blue** for all other alerts. Once the alert expires, the warning icon will no longer be visible in the banner.

Additional Notes:

- » A user with YSCIS Coordinator access level is able to delete an alert record.

The screenshot shows the YouthSupport interface for a user named Barry Beetroot. The 'Alerts' tab is selected, and the 'Create New Alert' button is highlighted. The 'Alerts' list shows two alerts:

Date	Worker / Type	Details
01/11/2018	A Coordinator Chronic Medical Condition	Suffers from severe eczema - needs access to appropriate medication to manage
01/11/2018	A Coordinator Aggressive Behaviour	Very frustrated with acknowledged difficulties managing anger triggers

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** – For guidance using this standard SRS functionality, please refer to Online Help guidance.

15.1 Adding Documents

1. From the **Persons** page, select the **Documents** tab
2. Click **Create New Document**. The **Edit Document Details** form will appear to the right of screen.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs) ⚠️ ⚠️

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes **Documents** Membership

Persons Documents Filter Create New Document

No Documents to display

Edit Document Details

Date 01/11/2018
Bring Up
* Worker/s A Coordinator, Training 1A ✖️
Document Type Attachment
Document
Description
Last update
Save

3. Select the **Date** by clicking the calendar icon – auto-populates to today's date.
4. Enter the **Bring Up** (review) date by clicking the calendar icon – if relevant.
5. The **Worker/s** icon will auto-populate to the worker attaching the document.
6. Add a **Description** of the document. (This description will be displayed in the Documents list)
7. Select **Save**.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs) ⚠️ ⚠️

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes **Documents** Membership

Persons Documents Filter Create New Document

Date	Worker	Document Type
01/11/2018	A Coordinator	Attachment
Medical assessment - 30.10.2018		


Export Properties of Documents 1 to 1 of 1

Edit Document Details

Date 01/11/2018
Bring Up
* Worker/s A Coordinator, Training 1A ✖️
Document Type Attachment
Document Select File... (Max File Size: 5 MB)
Description Medical assessment - 30.10.2018
Last update A Coordinator, Training 1A 01/11/2018 16:07:27 AEST
Save Delete

The **Select File** will now display, enabling you to attach the required document.

8. Select **Select File...** and the following dialog box will appear.

Upload File




Select File (Max File Size: 5 MB)

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.

9. Select **Browse** and locate the file you would like to upload.



10. Click **Up Load File**. The document will be attached to the person record and the filename will be displayed in the Document field.

 Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs)  

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



Recent List
Barry Beetroot
Aaron Apple
Carl Carrot






[Search](#) [Details](#) [Notes](#) [Payments](#) [Alerts](#) [Consent](#) [Referrals](#) [Plans](#) [Tasks](#) [Outcomes](#) **Documents** [Membership](#)

Documents  

Date ↑	Worker	Document Type
01/11/2018	A Coordinator	Attachment Medical assessment - 30.10.2018

1 to 1 of 1

Edit Document Details  

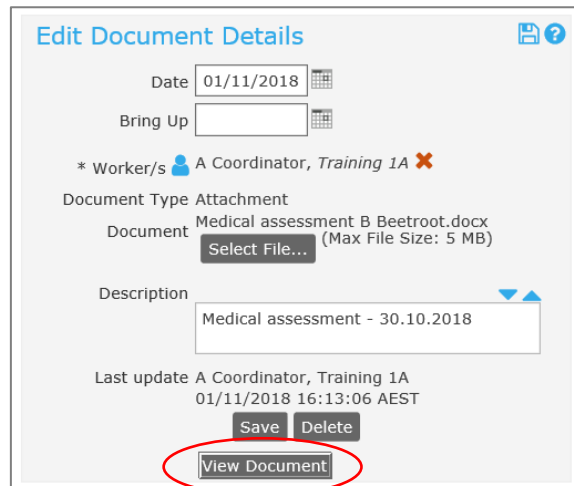
Date 
Bring Up 
* Worker/s  A Coordinator, Training 1A 
Document Type Attachment
Document  (Max File Size: 5 MB)
Description
Last update A Coordinator, Training 1A
01/11/2018 16:13:06 AEST

Additional Notes:

- » Only one document file can be uploaded for a document record. If you want to attach multiple documents, you will need to create multiple document records.
- » A user with Coordinator access level is able to **delete** a document record.

15.2 Viewing & Changing Documents

1. To view the document, click **View Document**



Edit Document Details

Date: 01/11/2018

Bring Up: [Calendar Icon]

* Worker/s: A Coordinator, Training 1A ✖

Document Type: Attachment

Document: Medical assessment B Beetroot.docx (Max File Size: 5 MB)

[Select File...]

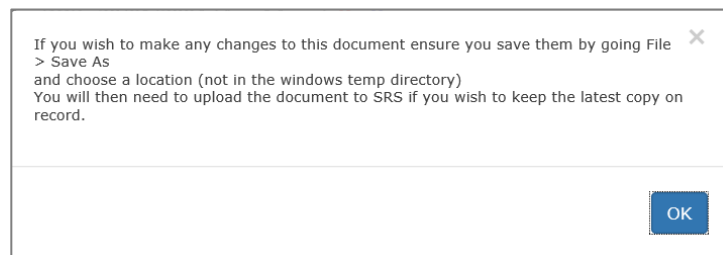
Description: Medical assessment - 30.10.2018

Last update: A Coordinator, Training 1A
01/11/2018 16:13:06 AEST

[Save] [Delete]

View Document

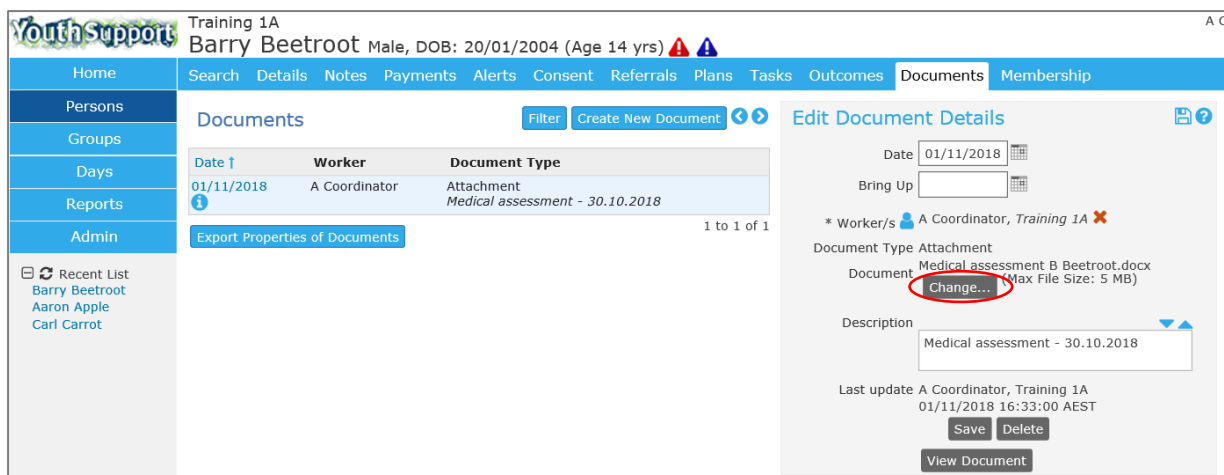
2. Please note that if you make changes to the document, the changes will not automatically be saved in the attached document. You will need to save the modified document to your network or local PC and then reattach the modified document.



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]

3. To change the document attached to the Document record, click **Change**.



Youth Support Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs) ⚠ ⚠

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes **Documents** Membership

Documents [Filter] [Create New Document]

Date ↑	Worker	Document Type
01/11/2018	A Coordinator	Attachment Medical assessment - 30.10.2018

1 to 1 of 1

[Export Properties of Documents]

Edit Document Details

Date: 01/11/2018

Bring Up: [Calendar Icon]

* Worker/s: A Coordinator, Training 1A ✖

Document Type: Attachment

Document: Medical assessment B Beetroot.docx (Max File Size: 5 MB)

Change...

Description: Medical assessment - 30.10.2018

Last update: A Coordinator, Training 1A
01/11/2018 16:33:00 AEST

[Save] [Delete]

View Document

You will be prompted to Browse and Upload the required file.

4. The new document will be attached to the Document record and the filename will be displayed in the Document field. The old document will be removed.

Training 1A
Barry Beetroot Male, DOB: 20/01/2004 (Age 14 yrs) ⚠ ⚠

Home Search Details Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents Membership

Persons Groups Days Reports Admin

Recent List
Barry Beetroot
Aaron Apple
Carl Carrot

Documents Filter Create New Document

Date ↑	Worker	Document Type
01/11/2018	A Coordinator	Attachment Medical assessment - 30.10.2018

Export Properties of Documents 1 to 1 of 1

Edit Document Details

Date 01/11/2018

Bring Up

* Worker/s A Coordinator, Training 1A ✖

Document Type Attachment

Document Medical assessment - Dr Jones.docx (Max File Size: 5 MB)
Change...

Description
Medical assessment - 30.10.2018

Last update A Coordinator, Training 1A
01/11/2018 16:33:00 AEST

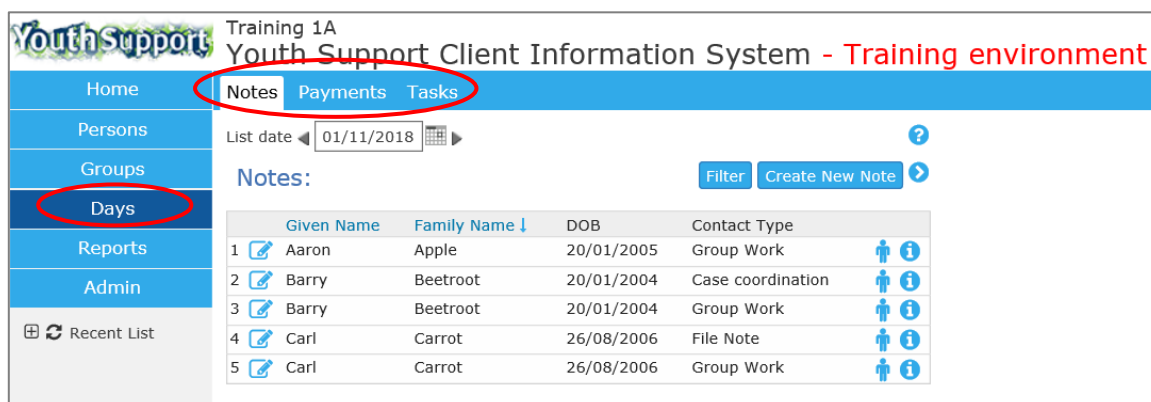
Save Delete

View Document

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

16 Days Page

The **Days** page provides an alternative view for Notes, Payments and Tasks created on a particular day.



	Given Name	Family Name	DOB	Contact Type
1	Aaron	Apple	20/01/2005	Group Work
2	Barry	Beetroot	20/01/2004	Case coordination
3	Barry	Beetroot	20/01/2004	Group Work
4	Carl	Carrot	26/08/2006	File Note
5	Carl	Carrot	26/08/2006	Group Work

16.1 Navigating within the Days Page

When you select a tab (Notes, Supports or Tasks), the records displayed will default to show those for the current date.

You can navigate through the days by clicking the left and right navigation arrows or by selecting a date via the calendar icon.

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

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

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

16.1.1 Creating a New Note from within the Days Tabs

1. On the **Notes** tab, click **Create New Note**.

The **Search for person to create new Note for** form will appear to the right of screen.



Search for person to create new Note for 01/11/2018

Given Name

Family Name

Sex ☐ Male ☐ Female

Fuzzy ☒

or

Last 28 Days

Results

2. Enter the **Given Name** and/or **Family Name** (using wildcard %) and click **Search**.

Search for person to create new Note for 01/11/2018

Given Name

Family Name





Sex ☐ Male ☐ Female

Fuzzy ☒


or

Last 28 Days

Results

Given Name ↑	Family Name	Sex	DOB	Match	
Aaron	Apple	Male	20/01/05	4	
Dylan	Adams	Male	01/05/52	4	
Harry	Allen	Male	27/05/85	4	
Lara	Alexander	Female	08/09/52	8	

1 to 4 of 4 results

3. If a record already exists you will see a list of records under **Results** – as above.
4. If a record does not exist you will see 'No matches to your search' under **Results**. Click [Add new Person](#) to create a new Person record.
5. Click the **Add New Note** icon  beside the appropriate record.
6. Enter Note details into the Note form. (See Creating a New Note for information on entering Note details)
7. Click **Save** or **Save Final**. **Save** allows you to enter a review at a later stage and edit. **Save Final** completes the review and you are unable to edit any further
8. Once you have created a new Note, it will appear in the Notes list on the left of screen.

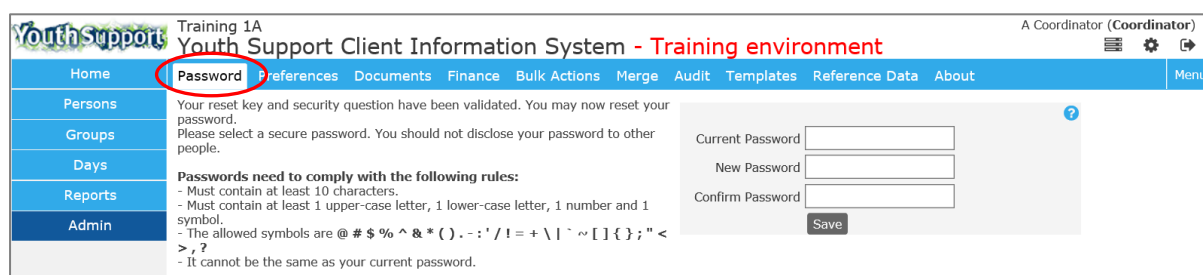
17 Admin Page

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

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

17.1 Change Password

On the **Admin** page, select the **Password** tab.



Training 1A
Youth Support Client Information System - Training environment

A Coordinator (Coordinator)

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

Persons
Groups
Days
Reports
Admin

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 10 characters.
- Must contain at least 1 upper-case letter, 1 lower-case letter, 1 number and 1 symbol.
- The allowed symbols are @ # \$ % ^ & * () . - : ' / ! = + \ | ` ~ ~ [] { } ; " < > , ?
- It cannot be the same as your current password.

Current Password

New Password

Confirm Password

Save

1. Enter your **New Password** and enter again in the **Confirm Password**. The password should be at least ten characters in length.

2. Click **Save**. Your password should now be updated.

Additional Notes:

- When entering password details, a system assessment of the password strength will be displayed. It is recommended that a password with a 'Strong!' strength level is entered.

17.2 User Preferences

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

When logging on to YSCIS for the first time, the 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 YSCIS 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 YSCIS. The **Email address** is also used to send Microsoft calendar requests when creating Tasks.

The **Email Address** and **Security** question are mandatory.

Training 1A
Youth Support Client Information System - Training environment

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

Persons
Groups
Days
Reports
Admin

User Preferences for A Coordinator

* Email Address worker@youthsupportservice.com

Messages You are currently not authorised to receive Reception Messages by email

Phone

Mobile

Fax

Title

Position

Organisation

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

* Security question What are the last five(5) characters of my drivers

* Security response *****

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

☐ I do not wish to receive these emails

Save Cancel

17.3 Documents

The **Documents** tab within the **Admin** page provides access to a general reference documents for the Youth Support Program.

Youth Support Client Information System

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

Show Filters ?

Document List

Document Name	Version	Description	Start Date	End Date*
YSCIS Privacy and Security of Client Information			20/11/2015	
YSCIS Consent Form			30/09/2015	
YSCIS Conditions of Use Agreement			20/11/2015	

1 to 3 of 3 results

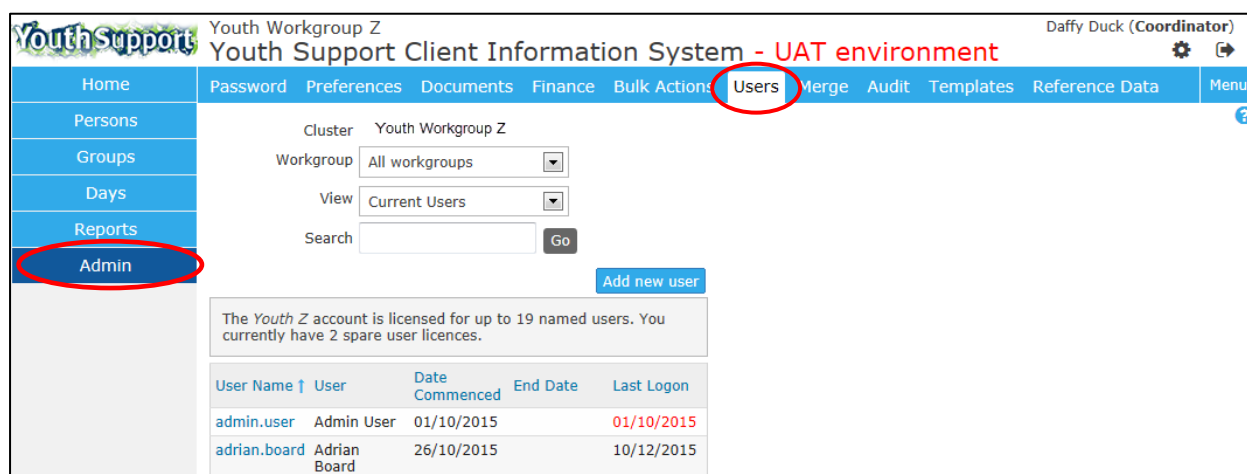
The documents within the **Documents** tab can be accessed and printed by clicking on the **Document Name**.

18 Coordinator Functions

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

18.1 User Administration

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



User Name ↑	User	Date Commenced	End Date	Last Logon
admin.user	Admin User	01/10/2015		01/10/2015
adrian.board	Adrian Board	26/10/2015		10/12/2015

18.1.1 Creating a New User

There are 4 steps required to create a new User in YSCIS, detailed below.

Step 1: Check for a spare licence

YSCIS licences have been allocated to your service outlet (Workgroup) by the Youth Support Program Team in alignment with your agreement. Your allocation of licences is referred to in YSCIS 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, Youth Workgroup Z has 19 named users and currently has 2 spare licences. This means there are currently 17 users allocated to Youth Workgroup Z.

Step 2: To create a new User

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

The screenshot shows the 'Youth Support Client Information System - UAT environment' interface. The 'Users' tab is selected in the top navigation bar. On the left, a sidebar contains links for Home, Persons, Groups, Days, Reports, and Admin. The main content area displays the 'Add new user' form. The form includes fields for User Name, First Name, Last Name, Email Address, Messages (set to 'Do Not Email Reception Messages'), Default Cluster (Youth Workgroup Z), Start Date (11/12/2015), New Password, Confirm Password, User Blocked (unchecked), Change password (unchecked), and Last Update. A 'Save' button is at the bottom right. A table below the form lists existing users with columns for User Name, User, Date Commenced, Role, and Last Logon. A red circle highlights the 'Add new user' button.

User Name ↑	User	Date Commenced	Role	Last Logon
admin.user	Admin User	01/10/2015	Normal User	01/10/2015
adrian.board	Adrian Board	26/10/2015	Coordinator	10/12/2015
amanda.suitor	Amanda Suitor	27/05/2015	Coordinator	10/12/2015
anthony	Anthony Laurance	15/07/2015	System Admin	11/12/2015
connie.dods	Connie Dods	03/06/2015	Normal User	
coordinator.user	Coordinator	01/10/2015	Coordinator	10/12/2015

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.

Enter the **First Name** and **Last Name**.

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.

Ensure that the **User Blocked** checkbox is not ticked.

Tick the **Change Password** checkbox, this will force the user to change their password when they first log into the application.

Click **Save**.

The User account has been saved – you will see the yellow notice advising that the user has not been allocated to any Workgroup.

Edit user record:

* User Name

* First Name

* Last Name

Email Address

Messages

* Default Cluster

Start Date

New Password

Confirm Password

User Blocked ☐

Change password ☐

A new user has been created. You must now add them to a workgroup to complete the process.

Add to workgroup

Last Update Worker Two, Youth Workgroup W
14/12/2018 12:41:10

A user is not able to log in to YSCIS until they have been allocated to a workgroup. Until they are allocated to a Workgroup, they are not using one of the licences.

Step 3: To allocate to a workgroup

To allocate access to a Workgroup, make a selection from **Add to workgroup** list (highlighted below) and click **Save**.

The user is not in any workgroup.

Add to workgroup

Last Update Worker Two, Youth Workgroup W
14/12/2018 12:41:10

Workgroup	Role	Operational	Remove
Youth Workgroup W	<input type="text" value="Normal User"/>	<input checked="" type="checkbox"/>	<input type="button" value="X"/>

Add to workgroup

Last Update Worker Two, Youth Workgroup W
14/12/2018 12:43:34

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.

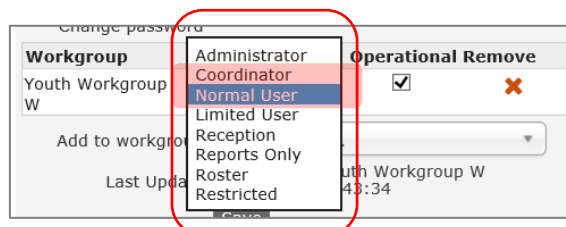
Sorry, you have reached your user limit. Please remove non-current users or contact Infoxchange to negotiate your user license arrangements.

Please contact the Youth Support Program Team to discuss your requirements.

Step 4: To allocate access level

The access level for the Workgroup will default to 'Normal User'.
Managers and team leaders should be given 'Coordinator' access level.

Note: Only **Normal User** or **Coordinator** role values are applicable for YSCIS.



Note: If the user is a manager who is not an 'operational' member of the workgroup, uncheck the **Operational** check box so that their **User Name** does not appear in the 'worker' drop down lists throughout YSCIS. For the majority of users, this should remain checked.

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

Function	Normal	Coordinator
Manage Enquiries	✓	✓
Create Client/ Person	✓	✓
Create Profile/ Case	✓	✓
Manage Case (notes, payments, consent, plans, documents, etc.)	✓	✓
Delete notes, payments, plans, etc.	✗	✓
Delete Profile/ Case	✓	✓
Create/ Manage Referrals	✓	✓
Create / Manage Groups	✓	✓
Performance reporting – basic	✓	✓
Performance reporting – advanced	✗	✓
Merge Clients/ Persons	✗	✓
Auditing	✗	✓
Perform Brokerage reporting	✗	✓
Manage document templates	✗	✓
Manage Users	✗	✓

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 on the left of screen.
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 the application.

The screenshot shows the 'Edit user record' form. The 'Change password' checkbox is checked and highlighted with a red rectangle. Other fields include User Name (Arthur.Apple), First Name (Arthur), Last Name (Apple), Email Address, Messages (Do Not Email Reception Messages), Default Cluster (Youth Cluster B), Start Date (14/12/2018), New Password, Confirm Password, User Blocked (unchecked), Workgroup (Youth Workgroup W), Role (Normal User), and Operational Remove (checked). A 'Save' button is at the bottom.

4. Click **Save**
The user will be required to set their own password when they log in.

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.

The screenshot shows the 'Edit user record' form. The 'User Blocked' checkbox is checked and highlighted with a red circle. Other fields are the same as in the previous screenshot, but the 'Change password' checkbox is now unchecked. The 'Save' button is at the bottom.

Simply uncheck the **User Blocked** check box (highlighted above) and click **Save**. The user will now be able to log in.

18.1.4 Removing User Access

When a staff member leaves your organisation, you have a choice as to how you manage their User record within YSCIS.

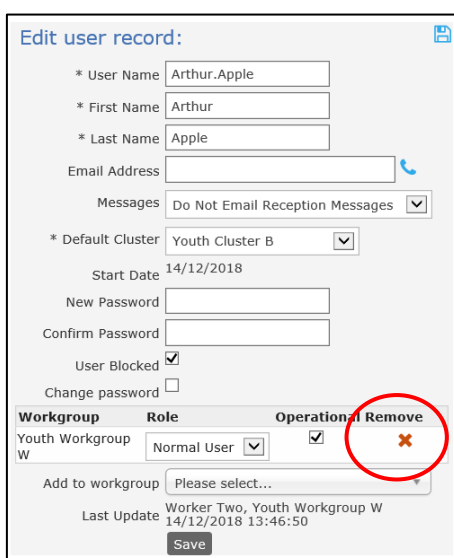
As outlined below, the first step to remove the User will cancel the licence allocated to their record and their name will remain the User list in the Users tab (on the Admin page).

A subsequent step to **Remove User** will clear their name from the User List. Both of these actions retain the User's name against all records they completed in YSCIS e.g. Case notes.

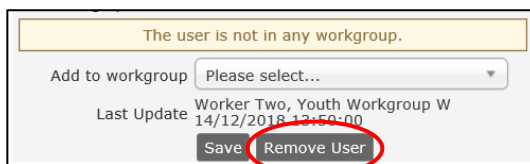
If you have a high turnover of Users, then choosing to remove them from the User List may be beneficial in keeping the List more manageable.

To remove the active user account:

1. Open the **Edit user record** form for the user account.



2. Click the **Remove** cross (highlighted above), then click **Save**.
3. The following message will appear:



Once a user has been removed from a workgroup, they are unable to log in. They will remain on the list of Current users on **Users** tab but they won't count towards the number of licences used.

4. To more easily manage users, click the **Remove User** button (highlighted above).

The user account will be removed as a current user - all database references to the user will be retained. For example, association with case notes.

If you want to temporarily suspend access for a user, tick the **User Blocked** check box. The user will not be able to log in to YSCIS.

18.2 Merging Person Records

The **Merge** tab on the **Admin** page allows you to merge duplicate person records for the same client. For example, two workers may have individually entered client details and one record is incorrect. (The **Merge** tab is only available to users with the YSCIS Coordinator access level.)

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 Merge Two Person Records

Please note that you will be unable to merge two records that contain Profiles/Cases with overlapping dates. To resolve this conflict, you can either delete one Profile/Case (if created in error) or alter the dates of the Profile prior to the merge process.

1. Click the **Merge** tab. The Search for primary record form will appear in the top left of the screen and the Search for secondary record form will appear in the top right of the screen.
2. In the **Search for primary record** form, 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.
3. Click **GO** and a list of possible primary person records will be displayed.
4. 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 '157' and the **Alias ID** is '157'.

Youth Support Client Information System - UAT er

Home Password Preferences Documents Finance Bulk Actions Users Merge

Merge Persons Search Duplicates

Search for primary record:

Given Name

Family Name smith

Gender ☐ Male ☐ Female

Fuzzy ☐

GO Clear

Results

ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Actions
74	Dotty	Smith	F	10/10/2000	0		Open Select
275	Person1	Smith	M	01/01/2001	0		Open Select
283	Person2	Smith	M	01/01/2001	0		Open Select

Youth Support Youth Workgroup W
John Dough Male, DOB: 01/04/2003 (Age 12 yrs)

Home Search **Details** Notes Payments Alerts Consent Referrals Plans Tasks Outcomes Documents

Persons **Person / Alias** Create new alias

John Dough Primary Name
Johnny Doe Alias

ID:157/157

Relationships: Create new relationship

Person	Relationship	DOB	Comments
Candy Dough	Mother	01/01/1981	

Profiles Create new profile

Profile Type	Workgroup	Start	Last Update
Integrated Response Case	Youth Workgroup W	05/08/2015	07/10/2015

Address: Create new address

Street	Locality	Type	Comments
✓ 12 First Avenue	MAROOCHYDORE QLD 4558	Home	

Recent List
John Dough
Person2 Smith
Person1 Smith
Bob Job
Casper Ghost
Johan Doe
Harry Jacks
Anita Trouble
Dotty Smith
Buzz Lightyear

5. 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.

6. Click **Select** to confirm the primary person record for the merge process. This is the record that will be kept.

Youth Support Youth Workgroup W
Youth Support Client Information System - UAT er

Home Password Preferences Documents Finance Bulk Actions Users **Merge**

Merge Persons Search Duplicates

Search for primary record:

Given Name

Family Name

Gender ☐ Male ☐ Female

Fuzzy ☐

GO Clear

Results

ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Actions
74	Dotty	Smith	F	10/10/2000	0		Open Select
275	Person1	Smith	M	01/01/2001	0		Open Select
283	Person2	Smith	M	01/01/2001	0		Open Select

Youth Support Client Information System - UAT environment

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

Persons Merge Persons Search Duplicates

Groups

Days

Reports

Admin

Primary Record (details kept)

Refresh New Search Go to Client

ID 275

Name Person1 Smith

Gender male

Date of Birth 01/01/2001

Indigenous Status

Country of birth

Language at Home

Comments

Date of Death

Last update Adrian Board, Youth Workgroup W
28/10/2015 12:36:16 AEST

Addresses

There are no registered addresses

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

Workgroup	Number
Youth Workgroup W	1

Search for secondary record:

Given Name

Family Name smith

Gender ☐ Male ☐ Female

Fuzzy ☐

GO Clear

7. Once you click **Select**, details for the selected person record will be displayed on the left side of the screen with the 'Primary Record (details kept)' heading.

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.

8. In the **Search for secondary record** form, enter the **First Name** and/or **Last 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.

Youth Support Client Information System - UAT environment

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

Persons Merge Persons Search Duplicates

Groups

Days

Reports

Admin

Primary Record (details kept)

Refresh New Search Go to Client

ID 275

Name Person1 Smith

Gender male

Date of Birth 01/01/2001

Indigenous Status

Country of birth

Language at Home

Comments

Date of Death

Search for secondary record:

Given Name

Family Name smith

Gender ☐ Male ☐ Female

Fuzzy ☐

GO Clear

Results

ID	Given Name	Family Name	Sex	DOB	Alias?	Match	Actions
74	Dotty	Smith	F	10/10/2000	0		Open Select
275	Person1	Smith	M	01/01/2001	0		Open Select
283	Person2	Smith	M	01/01/2001	0		Open Select

9. Click **GO** and a list of possible secondary person records will be displayed.

10. If you want to view the Person Details tab for the selected secondary person record, click **Open**. Note that the Person Details tab will open in a new browser tab.

11. 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.

Youth Support Client Information System - UAT environment

Primary Record (details kept) | Secondary (Merge) Record

Primary Record (ID 275):
 Name: Person1 Smith
 Gender: male
 Date of Birth: 01/01/2001
 Indigenous Status:
 Country of birth:
 Language at Home:
 Comments:
 Date of Death:
 Last update: Adrian Board, Youth Workgroup W 28/10/2015 12:36:16 AEST
 Addresses: There are no registered addresses.
 Documents (notes, alerts, etc) associated with this record:
 Workgroup: Youth Workgroup W, Number: 1
 Alias / Duplicates: No associated alias or duplicates.

Secondary (Merge) Record (ID 283):
 Name: Person2 Smith
 Gender: male
 Date of Birth: 01/01/2001
 Indigenous Status:
 Country of birth:
 Language at Home:
 Comments:
 Date of Death:
 Last update: Adrian Board, Youth Workgroup W 03/11/2015 12:34:21 AEST
 Addresses: There are no registered addresses.
 Documents (notes, alerts, etc) associated with this record:
 Workgroup: Youth Workgroup W, Number: 2
 Alias / Duplicates: No associated alias or duplicates.
 Validation Report:
 No conflicting Accommodation Periods
 No conflicting Profiles
 No conflicting Support Periods
 No conflicting Relationships

Buttons: Refresh, New Search, Go to Client, Make Alias, Merge

12. If you need to modify any details on the secondary 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 secondary person record information.

13. Carefully consider both records to ensure they relate to the same client before clicking **Merge**. Note that, 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).

14. 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)

Youth Support Client Information System - UAT environment

Primary Record (details kept) | Secondary (Merge) Record

Primary Record (ID 275):
 Name: Person1 Smith
 Gender: male
 Date of Birth: 01/01/2001

Secondary (Merge) Record (ID 283):
 Name: Person2 Smith
 Gender: male
 Date of Birth: 01/01/2001

Buttons: Refresh, New Search, Go to Client, Make Alias, Merge

15. 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, accommodation records or profiles between the selected primary and secondary person records.)

16. If you are sure you want to merge the records, click **OK** to confirm the merge. Once the merge process has been completed, a confirmation message will be displayed in the top right corner of the screen (see image below) indicating that the merge process was successful.

18.2.2 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 above).

The screenshot shows the YSCIS interface with a confirmation message on the right: "Merge completed successfully. Check the merge record and if necessary manually update the following areas of the Details tab: A primary address is identified and the primary address is correct. Duplicate data is deleted or retired, in particular: Relationships, Phone and other contacts, Key workers." On the left, the "Aliases / Duplicates" table lists a duplicate record with an "Undo Merge" link circled in red.

ID	Given Name	Family Name	Alias/ Duplicate	Last Update
283	Person2	Smith		Adrian Board, Youth Workgroup W 03/10/15 12:11

YSCIS will remember what records have been merged and will separate the records back into the original two person records. Please note that any new data/records attached to the person record after the merge process will stay with the primary person record if the merged records are unmerged at a later date.

18.2.3 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. Clicking the blue **Drop Alias** link (highlighted in image below) will allow you to delete the alias record that has been incorrectly entered or is no longer valid.

The screenshot displays the 'Youth Support Client Information System - UAT environment' interface. The left sidebar contains navigation links: Home, Persons, Groups, Days, Reports, and Admin. The top navigation bar includes: Password, Preferences, Documents, Finance, Bulk Actions, Users, Merge (selected), Audit, Templates, and Reference Data. Below the navigation bar, there are buttons for 'Merge Persons' and 'Search Duplicates'. The main content area is titled 'Primary Record (details kept)' and includes buttons for 'Refresh', 'New Search', and 'Go to Client'. The record details for ID 272, Casper Du Ghost, are shown. To the right, there is a 'Search for secondary record' form with fields for Given Name, Family Name (ghost), Gender (Male/Female), and Fuzzy search, with 'GO' and 'Clear' buttons. Below the details, there is a table of addresses, a section for documents associated with the record, and a table of aliases/duplicates. The alias table has columns for ID, Given Name, Family Name, Alias/Duplicate, and Last Update. The first row shows ID 288, Given Name Greg, Family Name, Alias/Duplicate, and Last Update Adrian Board, Youth Workgroup W. A red circle highlights the 'Drop alias' link in the last update column.

ID	Given Name	Family Name	Alias/Duplicate	Last Update
288	Greg		Alias	Adrian Board, Youth Workgroup W 06/11/15 14:15 Drop alias

18.2.4 Possible Duplicate Person Search

Coordinators have access to the **Search Duplicates** function on the **Merge** tab. This function will identify possible duplicate person records based on the Given Name, Family Name and Date of Birth fields.

Training 1A
Youth Support Client Information System - **Training environment**

A Coordinator (Coordinator)

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

Merge Persons Search Duplicates

Search for duplicate persons records:

Match Threshold 3 [Possible Match] Records 50 Search Clear

Search Results:

Potential Duplicates: 1

View	Person ID	Given Name	Family Name	DOB	Alias?	View	Person ID	Given Name	Family Name	DOB	Alias?	Match	Merge
	2027	John	Doe	16/04/2000			2028	John	Dough	16/04/2000		5	Select

The **Match Threshold** field (highlighted 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. One Match Threshold point is allocated for a match on each of the name fields (or fuzzy name matching) and two Match Threshold points are allocated for a match on the Date of Birth. A Match Threshold of 6 is an exact match on both the name fields and the Date of Birth. A lower Match Threshold figure allows for less exact matches to be displayed as potential duplicates.

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**. Select a lower **Match Threshold** to allow a less exact match.
2. Click **Search** to perform the possible duplicates search. Any possible duplicate person records will be displayed.

Youth Workgroup W
Youth Support Client Information System - **UAT environment**

Adrian Board (Coordinator)

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

Merge Persons Search Duplicates

Search for duplicate persons records:

Match Threshold 5 Records 50 Search Clear

Search Results:

Potential Duplicates: 1

View	Person ID	Given Name	Family Name	DOB	Alias?	View	Person ID	Given Name	Family Name	DOB	Alias?	Match	Merge
	275	Person1	Smith	01/01/2001			276	Person2	Smith	01/01/2001		5	Select

3. The results are presented with the two possible duplicate person records listed in the same row. The first person record detail is displayed on the left (see image above) and the second person record detail is displayed in the centre. The number of matched 'points' between the two records is displayed on the right in the **Match** column.

4. Click on the person icon to open the **Person** page, **Details** tab for that person record in a new browser tab. You will then be able to easily navigate back to the possible duplicates list.

5. If you would like to merge the two suggested possible duplicate person records, click the blue **Select** link (see image below) to automatically populate the Merge Persons tab with the selected records.

Youth Support Client Information System - UAT environment

Adrian Board (Coordinator)

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

Persons Merge Persons Search Duplicates

Search for duplicate persons records:

Match Threshold 5 Records 50 Search Clear

Search Results:


Potential Duplicates: 1

View Person ID	Given Name	Family Name	DOB	Alias?	View Person ID	Given Name	Family Name	DOB	Alias?	Match	Merge
275	Person1	Smith	01/01/2001		276	Person2	Smith	01/01/2001		5	Select


Additional Notes:

- » The list of possible duplicate person records can be exported to Excel by clicking the Export to Excel icon at the bottom of the list.
- » If you have a larger number of possible duplicate records returned, increase the **Match Threshold** to a higher level (such as 6 – exact match) to make it easier to identify the more likely duplicate records so that these can be reviewed first.

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 Document Templates

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

19 Reports Page

Youth Support Client Information System (YSCIS) includes a report engine that enables you to generate a 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**.

Training 1A
Youth Support Client Information System - Training environment

Home Reports Lists Financial Referrals Groups Custom Results

Persons
Groups
Days
Reports
Admin

Workgroup Training 1A

Report type Please select...

Include in report Please select...

Period of Interest Select range from list or enter start and end dates

Start date 14/12/2018

End date 14/12/2018

19.1 Reporting options available

19.1.1 Reports tab

On the **Reports** page, **Reports** tab, you can generate a number of reports.

Training 1A
Youth Support Client Information System - Training environment

Home Reports Lists Financial Referrals Groups Custom Results

Persons
Groups
Days
Reports
Admin

Workgroup Training 1A

Report type Please select...
Demographic Report
Profile Report
Contact Report
Family Report (using relationships)
Plan Report
Enquiry Report
Group Report
DCSYW Performance Report

Include in report

Period of Interest

Start date

The *Demographic*, *Profile*, *Contact*, *Family*, *Plan*, *Enquiry* and *Group* reports are generic to the SRS product.

The **DCSYW Performance Report** (and the corresponding **DCSYW Performance List**, accessed from the **Lists** tab) has been specifically developed for Youth Support services to assist in managing your service and streamline reporting requirements.

The **DCSYW Performance Report** reflects the results for the performance measures for your service based on a defined reporting period, streamlining reporting obligations to be entered into the Online Acquittal Support Information System (OASIS).

19.1.2 Lists tab

The **Lists** tab provides details of the individual records that are reflected in the corresponding report. The List can be exported to excel, enabling you to format and analyse the data as you require.

Training 1A
Youth Support Client Information System - Training environment

Home Reports **Lists** Financial Referrals Groups Custom Results

Persons
Groups
Days
Reports
Admin

Workgroup Training 1A
(To view lists for another workgroup change to that workgroup.)

List type Please select...
Demographic Details
Profile Details (by person)
Profile Details (by profile)
Contact Details (by person)
Contact Details (by contact)
Contact Totals (by person)
Family List (using relationships)
Outcomes
Payments
Payments (by family)
Plans
Enquiry List
Contact Summary
Accommodation List
YSCIS Performance List

As mentioned above, the **DCSYW Performance List** has been specifically developed to provide the individual records for each of the measure results reflected in the corresponding **DCSYW Performance Report**.

Managers are encouraged to run the **DCSYW Performance Report** and the **DCSYW Performance List** at the same time (for the same time period) to assist in their review and management of the service.

The other List types available are generic to the Infoxchange SRS product. Service managers need to assess the use of these for their own circumstances.

19.1.3 DCSYW Performance Report & DCSYW Performance List

Effective 1st July 2018, the Youth Support model was changed to:

- Expand the age range for young people to 8-21yrs
- Merge the *Support* and *Integrated Response* service types into a single case management category of *Support – Case Management*.

To accommodate this, the following message will appear when the **DCSYW Performance Report** (on the Reports tab) and the **DCSYW Performance List** (on the Lists tab) are requested:

The date range of this report must coincide with your selection in the Youth Support Model field below:

- Where '**01/07/2018 onwards**' has been selected please ensure that the Start date of report is equal to or greater than 01/07/2018
- Where '**To 30/06/2018**' has been selected please ensure that the End date of report is equal to or less than 30/06/2018

Training 1A
Youth Support Client Information System - **Training environment**

Home Reports Lists Financial Referrals Groups Custom Results

Persons
Groups
Days
Reports
Admin

Workgroup Training 1A

Report type DCSYW Performance Report

The date range of this report must coincide with your select in the Youth Support model field:

- Where '01/07/2018 onwards' has been selected please ensure that the Start date of report is equal to or greater than 01/07/2018
- Where 'To 30/06/2018' has been selected please ensure that the End date of report is equal to or less than 30/06/2018

Youth Support model 01/07/2018 onwards
To 30/06/2018

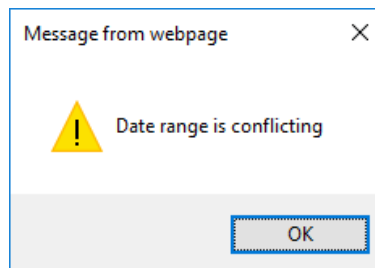
Period of Interest Select range from list or enter start and end dates

Start date 14/12/2018

End date 14/12/2018

Generate Report

If you select a reporting period that includes pre- and post- 1st July 2018 dates, the following warning will display:



Note: Support and Integrated Response Cases will be included in the **DCSYW Performance Report** for reporting periods from 1st July 2018 as *Support – Case management*.

Note: When running the **DCSYW Performance List**, be sure to select *Include identifying detail in list* (otherwise, client names will not display).

Youth Support Youth Workgroup W
Youth Support Client Information System - **UAT environment**

Home Reports Lists Financial Referrals Groups Custom Results

Persons
Groups
Days
Reports
Admin

Workgroup Youth Workgroup W
(To view lists for another workgroup change to that workgroup.)

List type DCSYW Performance List

Include Identifying Details Please select...
Do not include identifying details in list
Include identifying details in list

The date range of this report must coincide with your selection

The counting rules defined for each of the performance measures are provided in the following table:

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
GM07	Number of Service Users who had their case plans closed/finalised as a result of majority of needs being met	T314	Support - Case Management	Count of Support – Case Management cases closed within the reporting period with a <i>Reason for exit</i> of 'Majority of needs/plan goals met'
IS35	Number of users identifying as Aboriginal and/or Torres Strait Islander	T103 T314	Access - Information, Advice and Referral Support – Case Management	Count 1 for each individual unique case (Service User + case type) active* within the reporting period, who identifies as being of Aboriginal and/or Torres Strait Islander descent.
IS39	Number of Service Users identifying as being from a culturally and linguistically diverse background	T103 T314	Access - Information, Advice and Referral Support – Case Management	Count 1 for each individual unique case (Service User + case type) active* within the reporting period, who identifies as being from a culturally and linguistically diverse background.
IS131	Number of case panels coordinated	T314	Support – Case management	Count number of Notes created within the specified reporting period (for Support – Case management cases) where Contact type = <i>Case Panel Meeting</i> and 'Did 2 or more organisations attend?' is set to 'Yes'.
IS142	Number of Service Users receiving brokerage	T103 T314	Access - Information, Advice and Referral Support - Case Management	Count number of Cases that received brokerage within the specified reporting period.
IS145	Number of Service Users who exited the Service	T314	Support - Case Management	Count of number of Support – Case management cases closed within the reporting period.

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
IS147	Number of Service Users who received a service during the reporting period	T103	Access - Information, Advice and Referral	Count number of Access Cases created during the reporting period AND count number of Enquiries created during the reporting period where the service user is 'Client eligible for Access Case but no case required'
IS147	Number of Service Users who received a service during the reporting period	T314	Support - Case Management	Count number of Support – Case management Cases created during the reporting period
IS148	Number of Service Users who were referred to an external service	T103	Access - Information, Advice and Referral	Count number of Service Users with Access cases where Referral is recorded during the reporting period with Referral type = 'External' AND count number of Enquiries created during the reporting period where the service user is flagged as 'Client Eligible for Access Case but no case required' <u>and</u> Referral type is 'External'
IS148	Number of Service Users who were referred to an external service	T314	Support - Case Management	Count number of Service Users with Support – Case management case, where Referral is recorded during the reporting period with Referral type = 'External'
IS149	Number of Service Users who were referred to an internal service	T103	Access - Information, Advice and Referral	Count number of Service Users with Access Case where Referral is recorded during the reporting period with Referral type = 'Internal within Organisation' AND count number of Enquiries created during the reporting period where the service user is flagged as 'Client Eligible for Access Case but no case required' <u>and</u> Referral type is 'Internal within Organisation'
IS149	Number of Service Users who were referred to an internal service	T314	Support - Case Management	Count number of Service Users with Support – Case management Case, where Referral is recorded within the reporting period with Referral type = 'Internal within Organisation'

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
IS150	Number of Service Users with a new case plan developed	T314	Support - Case Management	Count number of unique Support – Management Cases where one or more case plans have been created within the specified reporting period.
IS151	Value of brokerage	T103	Access - Information, Advice and Referral	Sum of total brokerage for each individual unique case (individual service user + case type) created within the specified reporting period.
		T314	Support - Case Management	
IS205	Number of female Service Users	T103	Access - Information, Advice and Referral	Count 1 for each individual unique case (Service User + case type), active* within the reporting period, who identifies as female
		T314	Support – Case Management	
IS205	Number of male Service Users	T103	Access - Information, Advice and Referral	Count 1 for each individual unique case (Service User + case type), active* within the reporting period, who identifies as male
		T314	Support – Case Management	
IS255	Number of Service Users who are new	T103	Access - Information, Advice and Referral	Count number of active* Access cases created within the specified reporting period AND Count number of Enquiries identified as ‘Client eligible for Access Case but no case required’ created within the Reporting period.
IS255	Number of Service Users who are new	T314	Support - Case Management	Count number of active* Support – Case Management cases created within the specified reporting

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
OUTCOMES				
T103	Number of Service Users with improved ability to access appropriate services	OM2.1.05	Access - Information, Advice and Referral	Count number of active* Access cases within the specified reporting period AND Count number of Enquiries identified as 'Client eligible for Access Case but no case required' created within the reporting period.
T314	Number of Service Users with improved family interactions/connectedness	OM2.1.03	Support - Case Management	Count each unique case for Support – Case Management (individual service user + case type) that has more than one assessment and with one or more assessment completed within the reporting period. Compare the assessments and if the score against the most recent assessment (Review or Final) is higher than the First assessment completed for the 'My Family Relationships' Domain, then count as 1.
T314	Number of Service Users with improved quality of life	OM2.1.04	Support - Case Management	Count each unique Support – Case Management case that has more than one assessment and with one or more assessment completed within the reporting period. Compare the FIRST assessment with the most recent assessment completed during the reporting period and if the total score against the most recent assessment is higher than the original score against the 'Improved Quality of Life' Domain (made up of the following), then count 1: <ul style="list-style-type: none"> • My housing (1-5) • My schooling or work & income (1-5) • My physical health(1-5) • My drug and alcohol use (1-5) • My mental health (1-5) • My culture (if relevant) (0-5) • My disability (if relevant) (0-5) Total possible score = 35

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
T314	Number of Service Users with improved life skills	OM2.1.08	Support - Case Management	Count each unique Support – Case Management case that has more than one assessment and with one or more assessment completed within the reporting period. Compare the FIRST assessment against the most recent assessment completed within the reporting period and if the total score against the most recent assessment is higher than the original score against the 'Improved Life Skills' Domain (made up of the following) then count 1: <ul style="list-style-type: none"> • My parenting and children (if relevant) (0-5) • My involvement with the law (if relevant) (0-5) • My belief in my capacity to make changes (1-5) • My social connections (1-5) • Total possible score = 20
OUTPUTS				
T103	Number of hours provided during the reporting period	A01.1.06	Access – Information, Advice and referral	Count total time of Enquiries created within the specified period that are identified as 'Client eligible for Access Case but no case required' AND Count total time of Notes for Access cases created within the specified period where the Contact Type DOES NOT equal 'Group Work' AND Count total time of Group Notes where case type = Access and one or more Service User is attached (marked as attending) created within the specified period

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
T314	Support - Case Management	A01.2.02	Number of hours provided during the reporting period	Count total time of Notes created within the specified period for Support – Case Management Cases where the Contact Type DOES NOT equal 'Group Work' AND Count total time of Group Notes created within the specified period where case type = Support – Case management and one or more Service User is attached (marked as attending)

Note: **active *** = an open Case with a Note, Payment or Assessment (on Outcomes tab) record for a young person aged 8-21yrs.

IMPORTANT NOTE: Transition period

YSCIS was updated to reflect the new Youth Support model (effective from 1st July 2018) in late December 2018. During this period, services were able to select *Support* or *Integrated Response* cases for the new case category of *Support – case management*.

The ***DCSYW Performance Report*** and the ***DCSYW Performance List*** for periods commencing on and after 1st July, 2018, will include *Support* and / or *Integrated Response* cases, as relevant, in measures defined under the new Youth Support model as *Support – Case management*.

19.1.4 Financials tab

The Financial tab allows you to generate financial reports/lists based on the payment information entered into the **Payments** tab within the **Persons** page.

These are generic SRS products.

19.1.5 Referrals tab

The Referrals tab allows you to generate referral reports based on the referral information entered into the **Persons** page as well as info received via the **Home** Page, **Referrals** tab:

- » Referrals sent
- » Referrals received

19.1.6 Custom tab

This is standard functionality from the Infoxchange SRS product. It is generic to all SRS systems and not specific to Youth Support or YSCIS. For guidance on using this feature, click on the Help icon to access SRS Help or review the SRS product user guides at the following url: <http://srs-support.infoxchangeapps.net.au/user-guides>

19.1.7 Groups tab

The Groups tab allows you to generate reports for:

- » Current groups / activities, by selecting the specific group
- » Closed groups / activities, by selecting the specific group
- » All groups / activities, by selecting 'All groups'

19.2 Generating Reports

To generate reports from any of the tabs, select / define the values you require for each of the options presented.

1. Select the **Workgroup** and the **Report type**.
2. Select the relevant responses to the parameters displayed.

Youth Support Client Information System - UAT environment

Home Reports Lists Financial Referrals Groups Custom Results

Persons Groups Days Reports Admin

Workgroup: Youth Workgroup W

Report type: DCSYW Performance Report

The date range of this report must coincide with your selection in the Youth Support Model field below:

- Where '01/07/2018 onwards' has been selected please ensure that the Start date of report is equal to or greater than 01/07/2018
- Where 'To 30/06/2018' has been selected please ensure that the End date of report is equal to or less than 30/06/2018

Youth Support Model: 01/07/2018 onwards

Period of Interest: This Quarter

Start date: 01/10/2018

End date: 18/12/2018

Generate Report

3. Select the period you require for the report by selecting from **Period of Interest** drop-down values or set specific dates for Start and End using the calendar icons.
4. Click **Generate Report**. The following screen will be displayed.

Youth Support Client Information System - UAT environment

Home Reports Lists Financial Referrals Groups Custom Results

Persons Groups Days Reports Admin

Workgroup: Youth Workgroup W

Report type: DCSYW Performance Report

The date range of this report must coincide with your selection in the Youth Support Model field below:

- Where '01/07/2018 onwards' has been selected please ensure that the Start date of report is equal to or greater than 01/07/2018
- Where 'To 30/06/2018' has been selected please ensure that the End date of report is equal to or less than 30/06/2018

Youth Support Model: 01/07/2018 onwards

Period of Interest: This Quarter

Start date: 01/10/2018

End date: 18/12/2018

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: 7631
Please delete the report when no longer of use.

The report can be accessed from the **Results** tab using the report ID number.

19.3 Viewing Report/List Results

The **Results** tab allows you to view and delete reports and lists generated for your workgroup.

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.

YouthSupport

Training 1A
Youth Support Client Information System - Training environment

A Coordinator (Coordinator)

Home

Persons

Groups

Days

Reports

Admin

Reports

Lists

Financial

Referrals

Groups

Custom

Results

Menu

Display: ☒ My Reports ☐ All Reports

Report/List ID	Run By	Processing Time	Date Range	Workgroup	Type	Included persons / Report Title	Actions
Report 24 18/12/2018 12:47	A Coordinator	18/12/2018 12:47 0.307525 secs	From: 18/12/2018 To: 18/12/2018	Training 1A	DCSYW Performance Report		<a>Delete Report <a>View Report
Report 25 18/12/2018 12:48	A Coordinator	18/12/2018 12:48 0.260173 secs	From: 18/12/2018 To: 18/12/2018	Training 1A	DCSYW Performance Report		<a>Delete Report <a>View Report
Report 29 18/12/2018 16:42	A Coordinator	18/12/2018 16:42 0.297498 secs	From: 01/10/2018 To: 18/12/2018	Training 1A	DCSYW Performance Report		<a>Delete Report <a>View Report
List 30 18/12/2018 16:42	A Coordinator	18/12/2018 16:42 0.379955 secs	From: 01/10/2018 To: 18/12/2018	Training 1A	DCSYW Performance List		<a>Delete List <a>View List

Delete My Results

19.3.1 Viewing Reports

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

Training 1A
Youth Support Client Information System - Training environment

A Coordinator (Coordinator)

Home Reports Lists Financial Referrals Groups Custom Results Menu

Persons
Groups
Days
Reports
Admin

[Back to Report Results List](#) [Delete this Report](#)

Youth Support Client Information System (YSCIS). DCSYW Performance Report. 1. This report was run on 14/12/2018 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.

Report Information

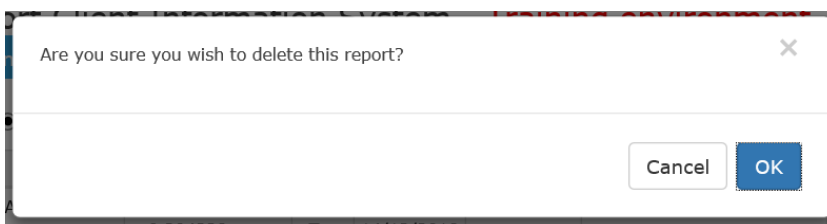
Report Type:	DCSYW Performance Report (01/07/2018 onwards)
Service Outlet:	
Service Outlet Name:	Training 1A
Period From:	01/12/2018
Period To:	14/12/2018
Funding Area	Young People

Performance

Measure No.	Measure Name	Service Type No.	Service Type Name	Response
GM07	Number of Service Users who had the case plans closed/finalised as a result of majority of needs being met	T314	Support – Case management	0
IS35	Number of users identifying as Aboriginal and/or Torres Strait Islander	T103	Access – Information, Advice and Referral	0
IS35	Number of users identifying as Aboriginal and/or Torres Strait Islander	T314	Support – Case management	1
IS39	Number of Service Users identifying as being from a culturally and linguistically diverse background	T103	Access – Information, Advice and Referral	0
IS39	Number of Service Users identifying as being from a culturally and linguistically diverse background	T314	Support – Case management	0
IS131	Number of case panels coordinated	T314	Support – Case management	1

19.3.2 Deleting Reports


1. Click **Delete Report**.
2. The following message will display:

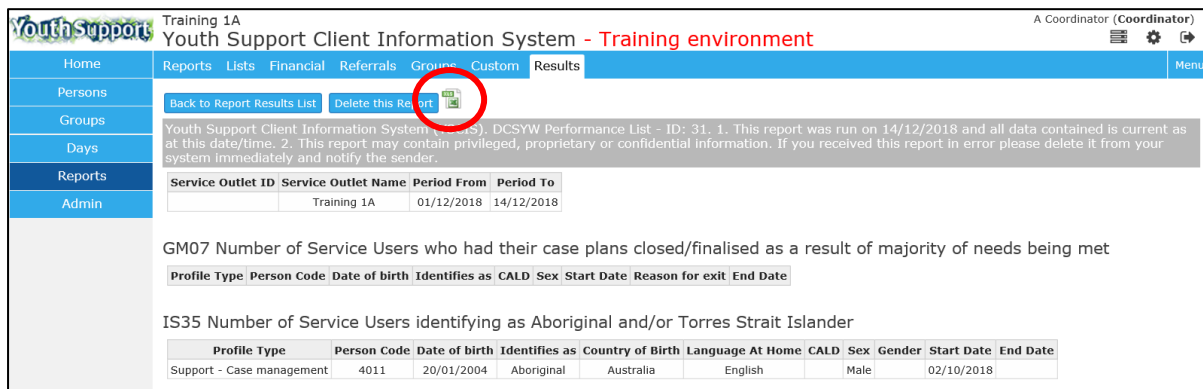


3. Click **OK** to delete the report or **Cancel** to keep the report.

19.4 Exporting Report/List Results


Reports and Lists are able to be exported to Excel. This will enable users to perform their own analysis of the data.

1. From the displayed results, click the **Excel**  icon



Training 1A
Youth Support Client Information System - Training environment

Home Reports Lists Financial Referrals Groups Custom Results Menu

Back to Report Results List Delete this Report 

Youth Support Client Information System (YSCIS). DCSYW Performance List - ID: 31. 1. This report was run on 14/12/2018 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.

Service Outlet ID	Service Outlet Name	Period From	Period To
	Training 1A	01/12/2018	14/12/2018

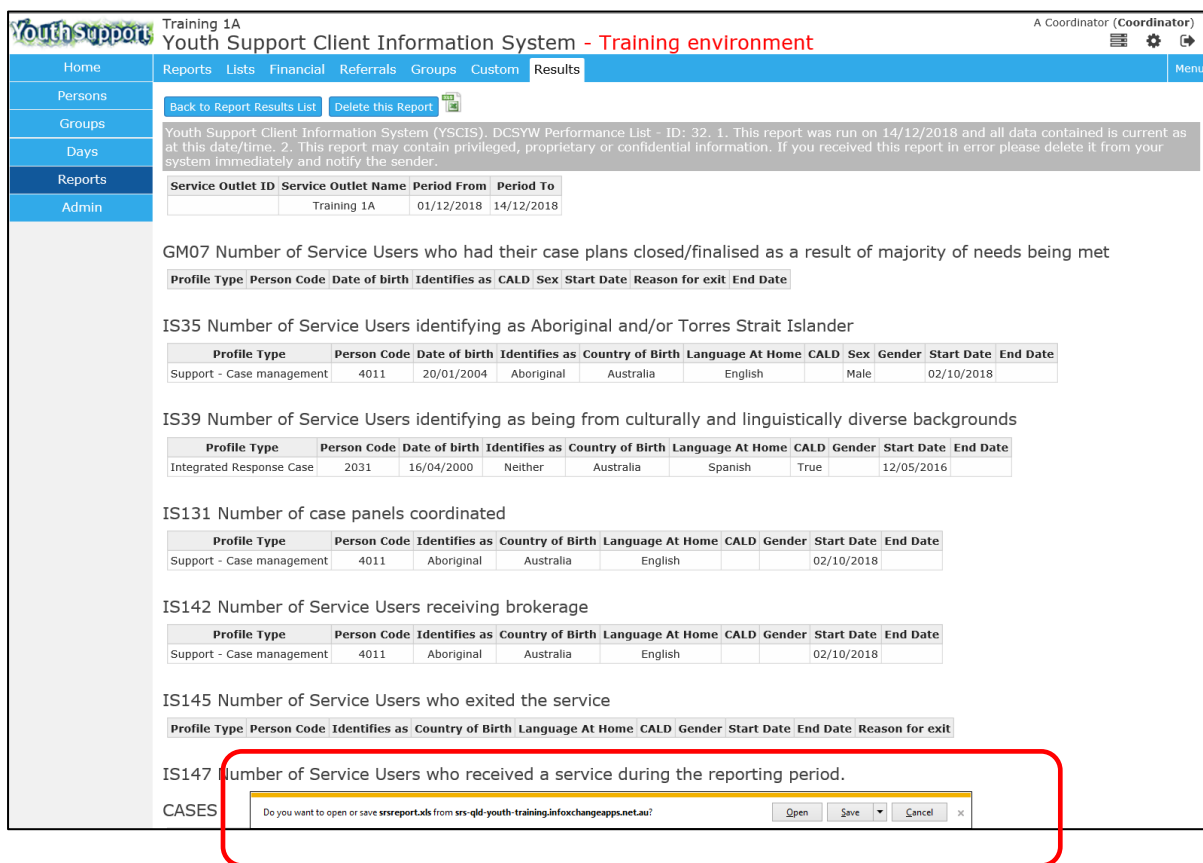
GM07 Number of Service Users who had their case plans closed/finalised as a result of majority of needs being met

Profile Type	Person Code	Date of birth	Identifies as	CALD	Sex	Start Date	Reason for exit	End Date
--------------	-------------	---------------	---------------	------	-----	------------	-----------------	----------

IS35 Number of Service Users identifying as Aboriginal and/or Torres Strait Islander


Profile Type	Person Code	Date of birth	Identifies as	Country of Birth	Language At Home	CALD	Sex	Gender	Start Date	End Date
Support - Case management	4011	20/01/2004	Aboriginal	Australia	English		Male		02/10/2018	

2. Select either **Open** or **Save**.



Training 1A
Youth Support Client Information System - Training environment

Home Reports Lists Financial Referrals Groups Custom Results Menu

Back to Report Results List Delete this Report 

Youth Support Client Information System (YSCIS). DCSYW Performance List - ID: 32. 1. This report was run on 14/12/2018 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.

Service Outlet ID	Service Outlet Name	Period From	Period To
	Training 1A	01/12/2018	14/12/2018

GM07 Number of Service Users who had their case plans closed/finalised as a result of majority of needs being met

Profile Type	Person Code	Date of birth	Identifies as	CALD	Sex	Start Date	Reason for exit	End Date
--------------	-------------	---------------	---------------	------	-----	------------	-----------------	----------

IS35 Number of Service Users identifying as Aboriginal and/or Torres Strait Islander

Profile Type	Person Code	Date of birth	Identifies as	Country of Birth	Language At Home	CALD	Sex	Gender	Start Date	End Date
Support - Case management	4011	20/01/2004	Aboriginal	Australia	English		Male		02/10/2018	

IS39 Number of Service Users identifying as being from culturally and linguistically diverse backgrounds

Profile Type	Person Code	Date of birth	Identifies as	Country of Birth	Language At Home	CALD	Gender	Start Date	End Date
Integrated Response Case	2031	16/04/2000	Neither	Australia	Spanish	True		12/05/2016	

IS131 Number of case panels coordinated

Profile Type	Person Code	Identifies as	Country of Birth	Language At Home	CALD	Gender	Start Date	End Date
Support - Case management	4011	Aboriginal	Australia	English			02/10/2018	

IS142 Number of Service Users receiving brokerage

Profile Type	Person Code	Identifies as	Country of Birth	Language At Home	CALD	Gender	Start Date	End Date
Support - Case management	4011	Aboriginal	Australia	English			02/10/2018	

IS145 Number of Service Users who exited the service

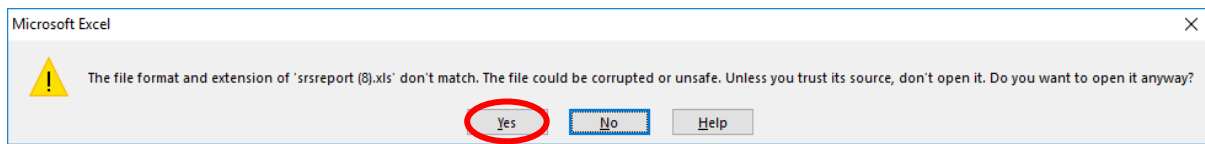
Profile Type	Person Code	Identifies as	Country of Birth	Language At Home	CALD	Gender	Start Date	End Date	Reason for exit
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IS147 Number of Service Users who received a service during the reporting period.

CASES

Do you want to open or save srs-report.xls from srs-qlid-youth-training.infochangeapps.net.au? Open Save Cancel x

The following message is likely to appear:



Click **Yes**.

The results are displayed in Excel.

The screenshot shows an Excel spreadsheet titled "srsreport (8).xls (Read-Only) - Excel". The spreadsheet contains a table with the following data:

Service Outlet ID	Service Outlet Name	Period From	Period To
Training 1A		1/12/2018	14/12/2018

Below the table, there are several sections of data, each starting with a heading:

- GM07 Number of Service Users who had their case closed/finalised as a result of majority of needs being met**
- IS35 Number of Service Users identifying as Aboriginal and/or Torres Strait Islander**
- IS39 Number of Service Users identifying as being from culturally and linguistically diverse backgrounds**
- IS131 Number of case panels coordinated**
- IS142 Number of Service Users receiving brokerage**
- IS145 Number of Service Users who exited the service**
- IS147 Number of Service Users who received a service during the reporting period.**

Each section contains a table with columns: Profile Type, Person Code, Date of Birth, Identifies as, Country of Birth, Language At Home, CALD, Gender, Start Date, End Date, and Reason for exit.

This provides you the flexibility to perform specific analysis or sorting of the available data.

20 YSCIS Support


20.1 Technical Support

Infoxchange provide a centralised helpline for users of their products. YSCIS is based on their SRS product.

If you experience any technical problems with YSCIS, please contact Infoxchange Helpline on **1300 366 516** or **(03) 9418 7487** or email srs-support@infoxchange.org

When you contact the Infoxchange Support Team, please quote the web address you use to access the application (<https://srs-qld-youth.infoxchangeapps.net.au>) and the workgroup that you belong to.

20.2 Online Help

The question mark icon  is found throughout YSCIS. 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, as relevant to the base SRS product) relevant to where you clicked. This information does not reflect any aspects of the application which have been specially modified for the Youth Support Program.

SRS Support is also available via the SRS [Online Help](#) website. The SRS online help also has a [Frequently Asked Questions](#) page and a [feedback](#) page where you can post a question to SRS support. **Online help is generic.**

20.3 Practice Support

For matters of practice, please refer to:

- The Practice Guide for Youth Support Services
- The Youth Wellbeing Assessment Common Assessment Tool and
- The Youth Support Frequently Asked Questions, available at:

<https://www.csyw.qld.gov.au/youth/youth-support-services>

Should you have any feedback regarding this User Manual or have a query that you have not been able to address using the options above, please contact the Youth Support Program Team at YouthInvest@csyw.qld.gov.au