

# How to Guide

1 December 2015

Managing referrals from QPS





# Purpose of this document:

This How to Guide provides the user with information on how to access and use SRS to manage referrals from QPS.

Through a partnership between a network of service providers and the Queensland Police Service, community members particularly those who are vulnerable and disadvantaged are being connected with appropriate and targeted services. This system enables services to receive and manage police referrals as outlined in Partnership Agreements with Queensland Police.





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# 1 About the SRS Police Referral system

#### POLICE REFERRALS

Frontline police have millions of interactions with community members each year. Many of these are with people experiencing stress, distress and a range of social issues. The QPS has been connecting vulnerable and disadvantaged people with support services for over ten years. Conducting referrals is now an embedded strategy of effective frontline policing as it assists to address underlying social and personal issues.

Frontline police have an ability to significantly impact on the lives of the people they encounter. Referral Services presents a significant opportunity to direct those in need to the help they require. The long term impact of this process can be life-changing for the referred client, their family and the local community.

The Queensland Police Service (QPS), as part of a cross-agency approach to support vulnerable individuals is able to make non-crisis referrals to service providers regarding the following issues:

SIGNIFICANT ISSUE	SUBCATEGORY
	Elder abuse (emotional/psychological; physical; sexual; financial)
Aged Support	Support for the aged person
	Support for family/carer
	Support for person with alcohol dependency
Alcohol misuse	Support for family/carer
Court Support for Victims of	Court Support
Crime	Victim Impact Statement
	Personal safety
	Home and property security
Crime Prevention Information	Business security
	Motor vehicle security
	Neighbourhood Watch
	Support for person with intellectual disability
Disability Support	Support for person with physical disability
	Support for family/carer
Domestic and Family Violence	Support for aggrieved
(Aggrieved)	Support for immigrant women
Domestic and Family Violence (Respondent)	Support for respondent
	Support for person with drug dependency
	Support for family/carer
Compling	Support for gambler
Gambing	Support for family/carer
Homolosspass	At risk of homelessness
nomelessness	Homeless
	Civil (consumer debt, social security, mental health)
Leyai auvice	Criminal law



	Domestic and Family Violence
	Family Law
Montal Health	Support for person with mental health issues
	Support for family/carer
	General consumers
Office of Fair Trading	Motor vehicles
Office of Fair Trading	Real estate
	Security Providers
	Difficult behaviour
Perenting Children Wouth	Family conflict
Parenting Children/ routh	Bullying
	Truancy
	Relationship support
	Emotional and mental wellbeing
Personal counselling	Anger management
	Grief counselling
Road Trauma	Support for family/friends/driver
Road Trauma	Support for family/friends/driver Support for family/friends following unexpected death/suicide
Road Trauma Sudden Death Support	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo
Road Trauma Sudden Death Support Suicide prevention - non	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo Support for a person who may be suicidal (non-emergency)
Road Trauma Sudden Death Support Suicide prevention - non emergency	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo Support for a person who may be suicidal (non-emergency) Support for family/carer
Road Trauma Sudden Death Support Suicide prevention - non emergency	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo Support for a person who may be suicidal (non-emergency) Support for family/carer Bullying
Road Trauma Sudden Death Support Suicide prevention - non emergency	Support for family/friends/driverSupport for family/friends following unexpected death/suicideSupport for family/friends related to death related to pregnancy or a child under age of 12yoSupport for a person who may be suicidal (non-emergency)Support for family/carerBullyingDrug / alcohol misuse
Road Trauma Sudden Death Support Suicide prevention - non emergency Support for Youth	Support for family/friends/driverSupport for family/friends following unexpected death/suicideSupport for family/friends related to death related to pregnancy or a child under age of 12yoSupport for a person who may be suicidal (non-emergency)Support for family/carerBullyingDrug / alcohol misuseMental Health (suicide prevention / self-harm / anxiety / depression)
Road Trauma Sudden Death Support Suicide prevention - non emergency Support for Youth	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo Support for a person who may be suicidal (non-emergency) Support for family/carer Bullying Drug / alcohol misuse Mental Health (suicide prevention / self-harm / anxiety / depression) Recreational Activities for Youth
Road Trauma Sudden Death Support Suicide prevention - non emergency Support for Youth	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo Support for a person who may be suicidal (non-emergency) Support for family/carer Bullying Drug / alcohol misuse Mental Health (suicide prevention / self-harm / anxiety / depression) Recreational Activities for Youth Other
Road TraumaSudden Death SupportSuicide prevention - non emergencySupport for YouthVictim Assist - Financial Assistance for violent crimes	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo Support for a person who may be suicidal (non-emergency) Support for family/carer Bullying Drug / alcohol misuse Mental Health (suicide prevention / self-harm / anxiety / depression) Recreational Activities for Youth Other Financial assistance for violent crimes
Road Trauma         Sudden Death Support         Suicide prevention - non         emergency         Support for Youth         Victim Assist - Financial         Assistance for violent crimes	Support for family/friends/driver Support for family/friends following unexpected death/suicide Support for family/friends related to death related to pregnancy or a child under age of 12yo Support for a person who may be suicidal (non-emergency) Support for family/carer Bullying Drug / alcohol misuse Mental Health (suicide prevention / self-harm / anxiety / depression) Recreational Activities for Youth Other Financial assistance for violent crimes Sexual offences
Road Trauma Sudden Death Support Suicide prevention - non emergency Support for Youth Victim Assist - Financial Assistance for violent crimes	Support for family/friends/driverSupport for family/friends following unexpected death/suicideSupport for family/friends related to death related to pregnancy or a child under age of 12yoSupport for a person who may be suicidal (non-emergency)Support for family/carerBullyingDrug / alcohol misuseMental Health (suicide prevention / self-harm / anxiety / depression)Recreational Activities for YouthOtherSexual offencesOther offences against the person
Road TraumaSudden Death SupportSuicide prevention - non emergencySupport for YouthVictim Assist - Financial Assistance for violent crimesVictim Support	Support for family/friends/driverSupport for family/friends following unexpected death/suicideSupport for family/friends related to death related to pregnancy or a child under age of 12yoSupport for a person who may be suicidal (non-emergency)Support for family/carerBullyingDrug / alcohol misuseMental Health (suicide prevention / self-harm / anxiety / depression)Recreational Activities for YouthOtherFinancial assistance for violent crimesSexual offencesOther offences against the personAnti-discrimination

#### SRS POLICE REFERRAL SYSTEM

The purpose of the SRS Police Referral system is to process referrals by Queensland Police Officers to nongovernment service provider partners. Police Officers will complete a web form with information about a person, their presenting issues and needs. The web form will be sent electronically to a non-government service provider, chosen based on location and service needs. The SRS Police Referral system is the online system that receives referrals allowing service providers to review the information and undertake the referral.



Non-government service providers receiving referrals through SRS will be able to:

- Receive the referral electronically on the SRS homepage
- · View details related to the person being referred, their presenting issues and needs
- Record attempts to contact the person
- Record the referral outcome
- Submit questions back to the referring Police Officer
- Copy and forward the referral to other services with the system automatically tracking referral progress.

SRS will send automatic electronic advice to the referring Police Officer on the outcome of the referral.

SRS is an online application developed by Infoxchange.

# 2 Accessing SRS Police Referral system

To access SRS Police Referral all users need:

- » Internet connection
- Internet browser: Infoxchange supports the three most recent versions of Internet Explorer, as well as the latest stable versions of Chrome and Firefox.
- » A URL, read 2.1 and 2.2 below to determine which URL you will use.

## 2.1 Existing SRS or SHIP users

If you are an existing Infoxchange SRS or SHIP user you will access police referrals from your existing system.

## 2.2 New SRS Users

If you are not an existing SRS/SHIP user you will use the following URL: <u>https://srs-</u> <u>gldconnect.infoxchangeapps.net.au/</u>. This site is referred to as SRS Queensland Connect in this manual.

# 3 SRS Welcome Page

To access Police Referrals go to your normal SRS instance or access the SRS Queensland Connect application as follows:

- 1. Type the URL into the browser.
- 2. Login using the username and password provided:
  - Users have four attempts to enter the correct username and password
  - On a fifth unsuccessful attempt users will be blocked from logging in for a period of 1 hour
- 3. The news section keeps users informed of any software updates or system outages.
- 4. Support options are listed under the '**Need help using SRS**?' heading. The SRS Queensland Connect User Manual link will be available here.

Each of the parts described above are numbered on the screenshot below.



https://srs-test-1.docker.dev/home.php?logout=1		▼ C Q Search	h	☆ 自	◙	ŧ	Â	Ø
OPS Portal - Referrals Install GoToMeeting in Most Visited Service Record System This database contains private and confidential information. Ac is subject to State and Federal privacy legislation. Only authors access this database. You should not give your username and password to any other your password secret. All access to this application is logged at audits.	th Cluster A UAT O Families I Login to Username Password	UAT Organization of the second	nfoxchange S	iervice S	2			
About SRS Service Record System (SRS) is an online client management system developed in partnership with the community services sector. SRS improves the efficiency and effectiveness of service delivery by helping organisations manage information and activities regarding individuals and families.	News Do I need to upgrade my web brow If you use Internet Explorer 8 (IE8) at to make use of a number of functions The most current version of Internet I The Admin > About tab in SRS will te currently using. For help to update yo the link http://srs-support.infoxchange your-browser	3 Aser? Ind below you will not be able currently available in SRS. Explorer is now Version 11. Il you which browser you are our web browser please follow papps.net.au/updating-	Need help us The Infoxchange Helpline (03) 9418 7487 or email sr If you contact support plea the application and the woo SRS Support is also availa SRS online help also has a feedback page where you	sing S can be contact s-support@in se quote the vr rkgroup that y able via the SF a Frequently A can post a qu	RS? cted on 1 foxchang web addir rou belon RS Online Asked Qu westion to	300 360 ge.net.a geto. geto. e Help v iestions s SRS si	6 516 o au u use to website s page a upport.	4 r access . The and a

## 3.1 Logging in for the first time

Users logging in for the first time will be taken to a page outlining the Terms and Conditions for using the SRS Police Referrals system. Users will either accept or not accept the Terms and Conditions via the buttons on the screen.

Infoxchange	ACME Support Services Police Referrals	
	Terms and Conditions	Move the scroll bar down to view all Terms and Conditions
	Conditions of Use AGREEMENT	^
	By logging on to the Service Record System (SRS) you agree to Acceptable use: Access to SRS is provided solely to authorised users (see definition bel - accessing referrals received from the Queensland Police Service (QPS) - recording information regarding individuals and families seeking and r - generating reports to assist in managing service delivery and to prov referring agencies; within the permission levels authorised by an agency's SRS Administrat obligations. By accepting the Conditions of Use, you agree to use SRS	the following Conditions of Use ow) for the purposes of: ; and/or eceiving support; and/or ide information to relevant funding bodies and or and in accordance with all legal and ethical solely for these purposes.
	Authorised users: Authorisation for agency staff to access SRS is managed by the SRS A Administrator assigns a unique username and initial password to each t information.	dministrator within that agency. The SRS user and sets permissions to view or alter client
Select 'Yes, I agree' to continue using the system	By accepting the Conditions of Use, you agree that: • you have been authorised to access SRS by your agency's SRS Admi • you will use the system within the parameters of your permission leve • you will not attempt to access client information for which you have n • you will protect your password and not share it with anyone else or n • you will inform your SRS Administrator immediately if you believe you authorised to see	inistrator el lo legitimate business requirement to access nake SRS available to anyone else have seen client information that you were not
	Do you agree with the Terms And Conditions? Ves, I agree No, I do not agree	

After reading through and accepting the Terms and Conditions, users will be prompted to update their details including a security question.

Users selecting 'No, I do not agree' will be logged out and taken to the login page. If users are unsure what to do, speak with your Manager or SRS Coordinator.



Home	Password Preferences Users Merge Audit About
	User Preferences for Jane Smith
Admin	Email Address mhollywood@infoxchange.org
	Phone
	Mobile
	Fax Important: You must update your details.
	- A security question must be selected with a proper response.
	Position
	Organisation
	The security question is used, together with your email, to ide you forget your password. It is stored in encrypted format read by others.
	Security question What are the last five(5) characters of m
	Security response
	Your email address recorded in SRS may be used by Infoxchange to communicate with you regarding scheduled SRS downtime, feature upgrades or tips on the effective use of SRS. If you do not want Infoxchange to use your email for this purpose please tick the box below.

After clicking Ok, users are taken to the Preferences Tab on the Admin Page.

#### <u>Steps</u>

- 1. Complete contact details.
- 2. Complete security question.
- 3. Tick the box if you do not want to receive updates about SRS.
- 4. Select save

NOTE: by entering an email address and answering a security question, users are able to select the 'forgot my password' link on the Welcome Page should a password be forgotten.

Infoxchange	ACME Support Services	Jane Smith (Coordin	ator)
Home	Password Preferences Users Merge Audit About		Menu
Persons			0
Reports	User Preferences for Jane Smith		
Admin	Email Address jpsmith25@acmesupport.org.au		
	Phone		
	Mobile 1. Complete contact details		
	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 license? If forgot my password' link on the Welcome Page		
4. Select Save t save these	Your email address recorded in SRS may be used by Infoxchange to communicate with you regarding scheduled SRS downtime, feature upgrades or tips on the effective used SRS. If you do not waith Infoxchange to use your email for this purpose please tick the box below. To I do not wish to receive these emails		
changes	Save Cancel		



## 3.2 Navigating SRS

SRS is a secure site. The URL has the same level of encryption as Internet Banking sites and will not appear in google searches. As a secure site, users must not use the back button on the browser. Navigate around the site by clicking on the pages, tabs, buttons and links. The system is a 'one click' system; double clicking on a button or link is not required.

After logging in, SRS will open at the **Home Page** on the **Referrals** Tab. Navigate around SRS by selecting page buttons on the left and tabs across the top of the page. Each page has multiple Tabs. Tabs allow the user to carry out particular functions within the selected page.

After logging in, users land on the **Home Page** on the **Referrals Tab**. This is reproduced in the screenshot below.

Infoxchange	ACME Support Services Service Name Police Referrals Tabs	User's Name
Persons Reports	Received Accepted Declined Sent Draft Subtabs	User Preferences
Admin	Id † Send Date Status Sent From Sent By Client Vulnerability Assessment	Access a Tabs for r
Pages	Queensland Police Southside Southside D02/12/2015 Waiting Service - D08: Routine 12:19:53 DD02-XJJT SOUTHBANK QPS 7654321 D1/01/1975 STATION Postcode: 4101	page from the menu
	@//12/2015         Waiting         Queenstand Police         Henry Hill           @//12/2015         Waiting         Service -         DOB:           12:23:08         QQ02-L6JK         SOUTHBANK         QP5 7654321 01/01/1930         High           STATION         Postcode:         4101	

Pages are grouped according to theme:

Home page:	Receiving and sending referrals, worker tools
Person's page:	Search, view, create and edit person records
Reports:	Run aggregate reports and unit-level lists about referrals received and sent
Admin:	Change password and User preferences

## 3.3 Accessing Help from the Queensland Police Referral Coordination Service

For support regarding the Police Referrals process and the content of Police Referrals, please contact Queensland Police Referral Coordination Service:

Phone 1300 058 910 (Monday – Friday 9am – 5pm)

Email rmcs@redbourne.com.au

## 3.4 Finding the SRS Queensland Connect User Manual

The User Manual is available, via the Frequently Asked Questions page, which can be accessed on the **SRS Welcome Page** under '**Need Help Using SRS**'.



# Need help using Police Referral System?

For support regarding the Police Referrals process and the content of the Police Referrals, please contact Queensland Police Referral Coordination Service: Phone 1300 058 910 or email :rmcs@redbourne.com.au

Support on using this system is also available via the SRS Online Help website. The SRS online help also has a Frequently Asked Questions page User Manual available at Frequently

Asked Question Page. Click to access.

# 3.5 Logging Off

Log off via the log out icon in 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 SRS.



**NOTE:** If you have not created a new record, saved your work or navigated around SRS for more than one hour you will be automatically logged out.

# 4 Referrals

The process of receiving and acting on a referral are stepped out in order in Figure 1 below, commencing with View Referral:

#### Figure 1 Referral Process



Once a Service Provider Action has been recorded for a QPS Referral, the referral is considered closed and the referring Police Officer will receive an automatic message advising of the referral's outcome.

## 4.1 Viewing Referrals



All Referrals received are available on the **Referrals** tab on the **Home** page. All received Referrals are listed on the first subtab '**Received**'.

#### <u>Steps</u>

- 1. Go to the **Home** Page.
- 2. Go to the Referrals Tab.
- 3. The page lands on the **Received** subtab. On the Received subtab all incoming referrals will be listed with a summary of information including:
  - Referral ID number
  - date and time the Referral was sent
  - current status of the Referral, for example waiting
  - sent from will name the Police organisational unit, for example SouthBank Station
  - sent by is the ID number of the referring Police Officer
  - the person's name, date of birth and gender
  - the final column displays the person's **Vulnerability Assessment** which may be 'Routine' or 'High'.
- Click on the blue Vulnerability Assessment column heading to sort the column so that the referrals rated with the highest vulnerability appear at the top of the list of referrals received. This action will assist users to prioritise the referrals received.



5. Click on the *icon* to view the referral and the **Referral** form opens on the right hand side of the page.

C Infoxchang	іа до <b>е</b> р	CME Sup olice	port Services Referrals	5											Jane Smith (Coor	dinator)
Home	М	y List T	eam List Ref	errals ISS Directory	Clicking o	n the Vulne iding has re	erability Ass -ordered th	essment ne column								Menu
Persons	ſ	Received	Accented	Declined Sent	so that the l	highest rate	d referrals	appear at	Referral	-			0	6. The Referral Form		
Reports		necorred	Accepted	beening being	th	e top of the	e referral lis	t J	Link referra	to database			E	opono noro.		
Admin	S	earch res	ults						This exter	nal referral is r	ot vet as	sociated with a	Client on			
🖯 🖸 Recent List		Id	Send Date	Status	Sent From	Sent By	Client	Vulnerability Assessment †	your datab first create	ase. If you pl a Client recor	an to acce d, or asso	ept this referral ciate the referra	you must al with an			
5. Click on the pencil icon to		6446	02/12/2015 12:23:08	Waiting QQD2-L6JK	Queensland Police Service - SOUTHBANK STATION	QPS 7654321	Henry Hill DOB: 01/01/1930 Postcode: 4101	High	First: Henry	Last Namo	Last:	Hill	Search			
Referral Form	6	4255		Waiting a08f8873-8f78-4f02- af4d-23d9fdcf3101	Queensland Police Service - BRISBANE CITY STATION TEAM 1	QPS 7654321	Jane Doe DOB: 01/01/1980 Postcode: 4101	High	Henry Meta Data	Hill	male	01/12/1930 dd Henry Hill as	() ∞ new Client ⊞			
		6444	02/12/2015 12:19:53	Waiting DDD2-XJJT	Queensland Police Service - SOUTHBANK STATION	QPS 7654321	Sally Southside DOB: 01/01/1975 Postcode: 4101	Routine	From Queen To ACME So So Organia	nsland Police upport Servic ervice ACME S	<i>Service -</i> es Support Se Community	SOUTHBANK S ervices				

6. Read through the information on the Referral Form starting from the top. Information is displayed under a series of blue banners. To view information under a heading, click on the plus symbol .

The Referral Form is a long form, therefore it is reproduced below in two parts including descriptions.



### The Referral Form from the top to the Person's Details

#### **Referral Form Part One**





## The Referral Form from Referred Issues to the end of the form

#### **Referral Form Part Two**

Defermed terriste		
Referred Issue/s	E	
Significant issues	Category: Alcohol misuse Subcategory: Support for person with alcohol dependency	
6	Category: Homelessness Subcategory: At risk of homelessness	
Issues Assessment	Q: Does the client have dependent children under 18? A: No	Referred issues detail the range
	Q: Provide details of children (number, age of children) A:	noted by the Police Officer. Significant issues are listed first,
5	Q: Is there a history of alcohol misuse? A: Yes	following by an assessment of potential risk factors.
	Q: Is there a history of homelessness? A: Unknown	
	Q: Current accommodation A: Rented house or flat	
	Q: 1. Is there likelihood of recidivism or victimisation? A: Yes	
	Q: 2. Does the person have a supportive environment (eg, family, friends, suitable accommodation)? A: No	Vulnerability
	Q: 3. Are other people within the household impacted by the issue? A: No	Assessment
t	Q: 4. Has there been an escalation in the seriousness and/or frequency of the issue? A: Yes	If any documents are attached to the
	Q: Other details A:	Referral they will be found under the Attachments Banner. Click on the plus symbol to view and open.
Vulnerability	routine	
Attachments	Œ	
Referral History	8	Tick box to record attempts to contact
Comments m	ay be viewed by the QPS Referral Coordination Service	person here. Additional information about contact attempts can be
Contact Attempts		recorded in the Comment field.
Comment		Click undate after adding a contact attempt
		and comment. Click PDF to export form.

## 4.2 Add the person to the client database

Users must add the person in the **Referral** to their client database prior to accepting the referral. At the time of receiving a referral, SRS automatically searches the service's client database for any record matching the person detailed in the Referral. The search results are displayed at the top of the **Referral Form.** 

The search results will provide users with two options:

- 1. link the referral to an existing person on the service's database OR
- 2. add the person as a new client.

To link the Referral to an existing person on the database:



#### <u>Steps</u>

- 1. Go to the top of the Referral Form, under the blue banner 'Link referral to database'.
- 2. Consider the list of potential matches. If a match is found, click on the link <sup>e</sup> icon to link the referral to an existing client.
- 3. If users want to check the record of the existing person on the database prior to linking, click on the person icon and the person's record will open.



#### To add the person as a new client.

#### <u>Steps</u>

- 1. Go to the top of the Referral Form.
- 2. Click on the 'Add (client name) as a new Client'.
- 3. The demographic and contact information in the referral will automatically be copied into the person's record on the client database.

Referral 😯	4 Deferrel Form
Link referral to database	1. Releftal Form
This external referral is not yet associated with a Client on your database. If you plan to accept this referral you must first create a Client record, or associate the referral with an exisiting Client.	Name of Person in the Referral
First: John Last: James	Search results
This person does not appear to be in the database. You migh want to make sure by modifing the search criteria. If you are not sure about the spelling try using the % symbol as a wildcard.	2. Click on the 'Add (client name) as a
Add John James as new Client	new Client

After adding the person to the database, or linking to an existing person record, a message is displayed on the Referral confirming the action.





## 4.3 Contacting the Person

Users are to record the attempts to contact the person.

#### Steps:

- 1. Go to the end of the **Referral Form.** Under **Contact Attempts**, tick the box next to a number each time contact is undertaken. Recorded attempts must be consecutive, for example if three contacts were made, the 1, 2 and 3 boxes would be ticked. Tick the correctly **numbered box.**
- 2. Add a **Comment** to describe the contact.
- Click Update to save the contact attempt and comment.
   After updating the Referral Form, the Contact Attempt is recorded and displayed under Referral History. The date and time the record was updated along with the worker' name is also recorded.



## 4.4 Accepting the Referral

After adding the person to the client database, an Accept button displays at the bottom of the Referral Form.



- 1. Go to the end of the **Referral Form.**
- 2. Click on the **Accept** button.



After accepting the Referral, the screen changes and a new field appears 'Service Provider Action'. After contacting the client, Users will select an option from the drop down menu to describe the result of the Referral. This field is completed when an outcome for the referral is known.

Referral History 🛛 🖂		
Referral accepted by Jane Smith, ACME Support Services 10:51am Tue 01/12/15		
Comments may be viewed by the QPS Referral Coordination Service		
Contact         2         3         4         5         6         7           Attempts         1         2         3         4         5         6         7		Service Provider Action field
Service Provider Action	×	Referral.
Comment		
Update PDF		

## 4.5 Recording Service Provider Action

After contacting the person users are to record the outcome of the Referral by selecting an option from the **Service Provider Action** drop down menu. Referrals are considered open until a Service Provider Action is recorded.

- 1. Go to the **Referral Form** and scroll down to **Referral History**.
- 2. Click on the drop down menu next to Service Provider Action. Select an option. The options are:
  - Client contacted services accepted
  - Client contacted services declined
  - Unable to be contacted information sent
  - Unable to be contacted no further action taken
  - On referred
  - Other / not applicable
- 3. Click **Update**.



Referral History	
Referral accepted by Jane Smith, ACME Support Services 10:51am Tue 01/12/15	1. Go to Referral History
Contact attempt: 1; Rang Sandy on mobile and left message. Referral updated by Jane Smith, ACME Support Services 11:05am Tue 01/12/15	
Contact attempt: 2; Rang Sandy on mobile and left message. Referral updated by Jane Smith, ACME Support Services 11:05am Tue 01/12/15	
Contact attempt: 3; Sandy returned call and set up appointment for tomorrow at 10am.	
Referral updated by Jane Smith, ACME Support Services 11:06am Tue 01/12/15	
Contact attempt: 4; Sandy called and postponed meeting to the following day.	2. Click on the drop down
Referral updated by Jane Smith, ACME Support Services 11:28am Tue 01/12/15	menu next to 'Service Provider Action', Add detail
Comments may be viewed by the QPS Referral Coordination Service	about the action in the comment field-if desired.
Contact Attempts $_1 \checkmark_2 \checkmark_3 \checkmark_4 \checkmark_5 \checkmark_6 \ _7 \ _8$	
Service Provider Client contacted - services accepted	$\checkmark$
Comment	
Met with Sandy and explained our services. Sandy has decided to receive a service from our agency.	3. Click update to save the record
Update	

# 5 View the person's record

Users can access a person's record once saved to the database via the methods below.

5.1 View person's record via the Referrals tab on the Home Page

- 4. Go to the **Referrals Tab** on the **Home Page**.
- 5. Go to the **Accepted subtab** displaying a list of all accepted referrals. The most recent referral accepted will be at the top of the list.
- 6. Select the record and click on the <sup>†</sup> icon. The Person's record will open on the **Details Tab** on the **Persons Page.**

C Infoxchange	ACM Po	1E Supp lice R	ort Services eferrals					
Home			am List Refe	rrals ISS Directory				
Persons	Re	ceived	Accepted	Declined Sent	Draft			
Reports		ceived	Accepted	becined Serie	biaic			
Admin	Sea	rch resu	lts					
🖯 🖸 Recent List		Id †	Send Date	Status	Sent From	Sent By	Client	Vulnerability Assessment
Click on the person icon to open up	8	6320	01/12/2015 13:19:16	Accepted 2D22-8T3P	Queensland Police Service - SOUTHBANK STATION	QPS 7654321	Henry Hill DOB: 01/12/1930 Postcode: 4101	Routine
the person's record	7 1	6224	30/11/2015 17:32:35	Accepted DQQ2-8GG5	Queensland Police Service - SOUTHBANK STATION	QPS 7654321	Sandy Southside DOB: 07/07/1978 Postcode: 4101	Routine



## 5.2 Using Search to view a Person Record

The **Search** tab on the **Persons** page is used to find a person record.

To perform a search, enter your search criteria details and click GO.

The Full Search Function contains a number of fields from which to search. It is usually best to leave the Fuzzy checkbox ticked as this allows the application to search for individuals with names that are a close match to the one typed. An example of Fuzzy searching can be found in the example screenshot below where the surname 'Dough' is searched. The search returns names similar to 'Dough'.

To clear all of the existing search parameters, click Clear.

#### <u>Steps</u>

- 1. Go to the Persons Page, Search Tab.
- 2. Enter a surname, keep Fuzzy selected to ensure a broad search of the database.
- 3. Select Search.
- 4. The search will return a list of any record/s found. Select a person by clicking on their name.

Infoxchange	ACME Support Service Police Referrals	s	2. Enter a Surname.			_		Jane Si	imith	
Home	Search		Keep Fuzzy Selected to ensure a broad search		3. Select Search				Menu	
Persons	Search By:      Name Ad	ldress () Phone () DOB							8	
Reports	Given name	Family name		emale 🖌 Fuzz	Search Clear					
Admin			00	• · ·						
🖯 🞜 Recent List	Search Results									
Jenny Dow	Given Name	Family Name	Sex		DOB	Alias?	Match †			
Jane Doe John James	Jane	Doe	Female		01/01/1980		3			
John Jones	Jenny	Dow	Female		25/02/1975		3			
1 Persons Page	John	Doe	Male		11/11/1980		3			
Search Tab	Add new Client	Search Re	sults	1	to 3 of 3			X	2	

5.3 Accessing a Person Record via the Recent List

- 1 Go to the **Home Page** or the **Persons Page**.
- 2 See the last ten **Person** Records accessed under 'Recent List'.
- 3 Click on a name to go to that record.



C Infoxchange	a ACME Support Services Police Referrals	Jane Smith
Home	Search	Menu
Persons	Search By:      Name() Address() Phone() DOB	0
Reports	Given name Male Female V Fuzzy Search Clear	I
Admin		
E C Recent List Jenny Dow Jane Doe John James John Jones	Search Results           A list of the last ten records accessed will be listed under 'Recent           List' on the Home and Persons Pages. Click on a name to go to           that Person's record.	

# 6 Adding information to a Person's Details

The Referral from Queensland Police will contain demographic and contact details that will automatically be copied into a person's record when saved to the client database. Users can update the demographic and contact details on a Person's record.

## 6.1 Add Address

A number of address types can be recorded, for example, postal, temporary, alternative, foster care. Only one address can be regarded as the primary address.

#### <u>Steps</u>

- 1. Select the Client and go to the **Details tab** in their record.
- 2. Select Create new address.
- 3. Complete address details.
- 4. Select Address type from the drop down menu.
- 5. Select Save.

Infoxchange	ACME Support Ser Jenny Dow Fe	vices emale, DOB: 25/0	2/1975 (Age 40 yrs)					Jane S	Smith
Home	Search Details N								Menu
Persons	Person / Alias:		]	Create new alias	New Address	Details:	<b>B 2</b>		
Reports	Jenny Dow	1. Go to the Details tab	Primary Name		Street	111 Abbott Street			
Admin	Relationships:	L		Create new relationship	00000		3. Complete address		
E C Recent List	No relationship exists			11	Suburb	CAIRNS	details		
Jenny Dow Jane Doe	Address:		2. Select Create new address	Create new address	State				
John James John Jones	No address exists			J	State	QLD V			
John Johes	Phone & other co	ntacts:		Create new econtact	Postcode	4870			
	No contacts exist			Country	Australia				
	Key Workers:			Create new key worker	Comments	Couch Surfing			
	This person has no ass	signed key workers		Export Details Refresh					
					Address type	Temporary	4. Select address type from the		
					Primary Address?	Yes      No	drop down menu		
					Current Address?	Yes      No			
					May be viewed by	○ Workgroup ○ Cluster			
					Last update	Save	5. Save		

#### View address on a Map

Users can click on the map icon, next to the address and a new browser tab will open with the address displayed on a map.

#### <u>Steps</u>

1. Click on map icon to open Map.



Infoxchange	ACME S Sand	support s y Sou	Services thside	e Fema	le, DO	B: 07/07/1978 (Age 37	yrs)			
Home	Search	Details	Notes	Alerts	Refer	rals				
Persons	Person	/ Alias:						Create new alias		
Reports	Sandy Southside					Primary Name				
Admin	Relationships:							Create new relationship		
E 🛛 Recent List	No relatio	No relationship exists				Click on map icon to or	ben			
Sandy Southside Holly Holliday	Addres	s:			address in a map Create new					
John James	Str	eet			Locality T			Comments		
John Jones Jenny Dow	✓ 2/37 Sou	7 Boundary th Brisban	v Street e Qld 4101		SOUT	H BRISBANE QLD 4101		• •		

## **Update Address details**

A principle within the system is to close and update information rather than delete information. The steps below show how to record an address that is no longer current.

#### <u>Steps</u>

- 1. Select the **Person**'s record from the **Search Tab** on the **Person's Page** or by selecting from the **Recent List.**
- 2. Select the Current Address.
- 3. Scroll to the bottom of the Edit Address Details panel.
- 4. Click on 'No' next to Primary Address.
- 5. Click on 'No' next to Current Address.
- 6. Select Save.
- 7. Note that a View Prior button is now visible in the Address field.
- 8. Add new address record.

Infoxchange	ACME Support Services Jenny Dow Female	s le, DOB: 25/02	/1975 (Age 40 yrs)					Jane Si	mith
Home	Search Details Notes	Alerts Refer	rals						Menu
Persons	Person / Alias:			Create new alias	Edit Address	Details:	P 2		
Reports	Jenny Dow 1	1. Got the	Primary Name		Street	112 Abbott Street			
Admin	Relationships:	etalis I ab		Create new relationship					
🖯 🖸 Recent List	No relationship exists				Suburb	CAIRNS			
Jenny Dow Jane Doe	Address:		Create	e new address View Prior	State	QLD ¥			
John Jones	Street ✓ 113 Abbott Street	CAIRNS QLE	1 ype 0 4870 Temporary	Comments	Postcode	4870			
2. Click on the blue highlighted Address	Click on the e highlighted Address Cares exist Key Workers:		5. Note View Prior button indicating prior record	Greate new key worker	Country Comments	Australia			
	This person has no assigned	l key workers		Export Details Refresh	Address type Primary Address? Current Address? May be viewed by	Temporary V Yes No Yes No Workgroup Cluster	3. Select No for Primary and Current Address		
					Last update	Jane Smith, ACME Support S 20/11/2015 14:02:22 AEST Save	Services 4. Save		

## 6.2 Create eContact

Econtacts are electronic records and include mobile numbers, email addresses and skype addresses. Emergency contact details can also be stored as an Econtact.

## Steps 1. Go to the Details tab.

#### infoxchange.org



- 2. Select Create new econtact.
- 3. Complete contact details and select Contact type from the drop down menu.
- 4. Select Save.

Infoxchange	ACME Support S Jenny Dow	Services Female, DOB: 25/0	)2/1975 (Age 40 yr:	s)			Jane	Smith
Home	Search Details	Notes Alerts Refe						Menu
Persons	Person / Alias:			Create new alias	Edit Contact Details:	P 0		
Reports	Jenny Dow	1. Go to the Details Tab	Primary Name		Contact imdow75@bigpond.con		3 Complete Contact and	ר
Admin	Relationships:	1		Create new relationship	Contact type Email		select Contact Type from the	
E C Recent List Jenny Dow Jane Doe	No relationship exis	ts					drop down menu	
	Address:			Create new address View Prior	Comments			
John James	Street	Locality	Тур	e Comments				
John Johes	🖌 113 Abbott St	treet CAIRNS Q	LD 4870 Temp	porary 💡	May be viewed by OWorkgroup Cluster	er		
	Phone & other	contacts:		Create new econtact	Start Date 20/11/2015			
	No contacts exist	2.	Select Create new econtact		End Date			
	Key Workers:		ocontact	Create new key worker	Current econtact?   Yes   No			
	This person has no	assigned key workers			Last update			
				Export Details Refresh	4.	Save		
					Save			

## 6.3 Add Relationship

Users are able to add people related to a client in the person's record. SRS will search the database for any matches to people already on the database prior to adding. Creating a new relationship takes users through three screens as demonstrated below.

- 1. Go to the **Details tab.**
- 2. Select Create new relationship.
- 3. Enter **person's name** into the form.
- 4. Select Go.
- 5. If no matches select add new person OR select the existing person.

Infoxchange	ACME Support S Jenny Dow	ervices Female, DOB: 25/0	2/1975 (Age 40 yrs)			Jane Smith
Home	Search Details	Notes Alerts Refe			name and Sex	
Persons	Person / Alias:			Create new alias	Search for related person:	2
Reports	Jenny Dow	1. Go to the Details tab	Primary Name		Given name Chris	
Admin	Relationships:		2. Select Create	Create new relationship	Family name Brown	
🖯 🞜 Recent List	No relationship exist	IS	new relationship		Sex  Male Female	
Jenny Dow Jane Doe	Address:			Create new address View Prior	Fuzzy 🖌 4. Select Go	
John James	Street	Locality	Туре	Comments	Go Clear	
John Johnes	✓ 113 Abbott St	113 Abbott Street CAIRNS QLD 487		ry 💡	Results	
	Phone & other	contacts:		Create new econtact	No matches to your search.	
	Contact		Туре	Comments	Tip:If you are not sure about the spelling try using the % symbol as	
	jmdow75@bigpo	ind.com	Email		a wildcard. For example, johns% would return both johnstone and johnson.	
	Key Workers:			Create new key worker	Add new person	
	This person has no	assigned key workers			5. Select Add new person	
				Export Details Refresh		

- 6. Enter demographic details (year of birth can be estimated).
- 7. Select Save.



Infoxchange	ACME Support Service	s le, DOB: 25/02/1975 ( <i>A</i>	Age 40 yrs)					Jar	ne Sr	mith
Home	Search Details Notes	Alerts Referrals	5 , ,							Menu
Persons	Person / Alias:			Create new alias	Add New Person		<b>D</b> O			
Reports	Jenny Dow	Primary Na	ime		Civen Name Chi	ric				
Admin	Relationships:			Create new relationship	Middle Name	13				
🖯 🛢 Recent List	No relationship exists				Family Name Bro	own	M			
Jenny Dow Jane Doe	Address:		Cre	ate new address View Prior	*Sex ()	Male Female		6 Entor domographia		
John James John Jones	Street	Locality	Туре	Comments	Date of Birth 02	10 1976		details (year of birth can be		
	<ul> <li>113 Abbott Street</li> </ul>	CAIRNS QLD 4870	Temporary	<b>Q</b>		year estimated		estimated)		
	Phone & other contac	ts:		Create new econtact	Identifies as 🔘	Aboriginal				
	Contact		Туре	Comments	0.	Torres Strait Islander				
	jmdow75@bigpond.com		Email			Neither				
	Key Workers:			Create new key worker	Identifies as	Australian South Sea Islan	der			
	This person has no assigned	l key workers			Country of high					
				Export Details Refresh	Country of birth					
					Language at home					
						Culturally and Linguistically	Diverse			
					Comments					
					Date of Death	(dd/mm/y	(ууу)	7 50%	٦	
					Last Updated			7. Save		
					Sav	/e				

- 8. Select **relationship type** from the drop down menu.
- 9. Enter start and end dates if relevant.
- 10. Select Save.

C Infoxchange	ACME Support Services Jenny Dow Female	, DOB: 25/02/1975 (A	Age 40 yrs)				Jane S	Smith
Home	Search Details Notes							Menu
Persons	Person / Alias:			Create new alias	Edit Relationship	8. Select relationship type from the drop down menu		
Reports	Jenny Dow	Primary Na	ime		Related person Chris Brown			
Admin	Relationships:			Create new relationship	is Jenny Dow's Partner			
🖯 🖸 Recent List	No relationship exists				Start Date 07/11/2009	9. Enter start and end dates if		
Jenny Dow Jane Doe	Address:		Cr	eate new address View Prior	End Date	relevant		
John James	Street	Locality	Туре	Comments				
John Johes	<ul> <li>113 Abbott Street</li> </ul>	CAIRNS QLD 4870	Temporary	<b>Q</b>	Comments			
	Phone & other contacts	s:		Create new econtact		н.		
	Contact		Туре	Comments	Last update			
	jmdow75@bigpond.com		Email		Save			
	Key Workers:			Create new key worker	Print View 10. Save			
	This person has no assigned k	ey workers						
				Export Details Refresh				

## 6.4 Add Key Worker

Adding a Key Worker to a client record allows users to know who is working with a client.

- 1. Go to the **Details tab.**
- Select Create new key worker.
   Select worker from the drop down list.
   Enter Worker Role.
- 5. Select Save.



C Infoxchange	ACME Support S Jenny Dow	ervices Female, DOB: 25/02/19	975 (Age 40 yrs)			Jane S	mith
Home	Search Details	Notes Alerts Referrals			3. Select the worker from		Menu
Persons	Person / Alias:		ו	Create new alias	Edit Key Worker:		
Reports	Jenny Dow	1. Go to the Details tab	ary Name		Key Worker Jane Smith		
Admin	Relationships:	L	J	Create new relationship	Workgroup ACME Support Services		
C C Recent List	Person	Relationship	DOB	Comments	Role Support Worker		
Jenny Dow Jane Doe	Chris Brown	Partner	02/10/1976				
John James John Jones	Address:		Cre	eate new address View Prior	Comments		
	Street	Locality	Туре	Comments	A.		
	<ul> <li>113 Abbott Str</li> </ul>	reet CAIRNS QLD 48	Temporary	<b>9</b>	May be viewed by OWrkgroup Cluster		
	Phone & other o	contacts:		Create new econtact	Start Date 20/11/2015		
	Contact		Туре	Comments	End Date		
	jmdow75@bigpo	nd.com	Email		Current Key 💿 Yes 🔿 No		
	Key Workers: This person has no a	assigned key workers 2. Se	lect Create new key worker	Create new key worker Export Details Refresh	Uorker? Last update 5. Save		

After adding a Key Worker to client records:

- Users can view a list of all their clients by going to the **My List** tab on the **Home** page.
- Users can view a list of all clients in their service with an allocated **Key Worker** by going to the **Team** List tab on the **Home** page.

To view a list of all clients assigned to a user:

6. Go to the My List tab on the Home Page. All clients will be listed. Use the Calendar icons to change the date range in order to see clients from previous months. Export the list to Excel or to a PDF file by clicking on the icons.

Infoxchange	ACME Support Police Ref	Services errals 1.	Go to the My List	tab on the Home	Page	The date rang	ge can be changed by typing	1		Jane Sn	mith
Home 🗕	My List crieam	List Referrals	ISS Directory			in ne	w dates, then hit Go				Menu
Persons	Open Between:	Start date 22/11	/2015 📰 End date 22	2/11/2015 Hide Te	am Managed: Profile Status: Ple	ase select					8
Reports	My List (Jane S	imith)					00				
Admin	Given Name †	Family Name	Worker Role	Key Worker Starte	ed Key Worker Ended F	irst Contact*	Most Recent Contact*	Number of Contacts*	Time Since Last Contact*	Current Plan	
🖯 😂 Recent List	Holly	Holliday	Case Worker	22/11/2015				0		No	
John Jones	Jenny	Dow	Case Worker	22/11/2015	The blue beeded columns	/11/2015	20/11/2015	1	2 days	No	
Holly Holliday	John	Jones	Team Managed	22/11/2015	are sortable and if selected			0		No	
Jane Doe John James	* Includes all rec	orded contacts wit	th ACME Support Servi	ces (does not include	will reorder the column	1 to 3 of 3		Export t	he list to Excel or to a PDF File		1

To view of list of all clients with an allocated key worker assigned within the service:

7 Go to the Team List tab on the Home Page. All clients and allocated key workers will be listed. Use the Calendar icons to change the date range to tailor your search. Export the list to Excel or to a PDF file by clicking on the icons.

	ACME Support S	Services 1	. Go to the Tea	am List on the	Home Page						Jane Smith
Intononango	Police Rere					Change	the date range				*
Home	My List Team Li	st Referrals				an	d click Go				
Persons	Open Between 2	2/11/2015 🔳 a	nd 22/11/2015	Key Worker	Please sel 🗸 Show Last w	orker Alerts P	rofile Status Please	select V Go			0
Reports	My Team List (A0	CME Support S	iervices)								
Admin	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
🖯 🕻 Recent List	Jane Smith	Holly	Holliday	Case Worker	22/11/2015				0		No
John Jones Jenny Dow	Jane Smith	Jenny	Dow	Case Worker	22/11/2015		20/11/2015	20/11/2015	1	2 days	No
Holly Holliday	Team Managed	John			22/11/2015				0		No
Jane Doe John James			Note the Key Client N	vvorker and ames			1 to 3 of 3			Export the list to Excel or PDF	
	* Includes all recor	ded contacts			t include file notes).						



# 7 Creating Notes

Creating notes allows users to record details about client contact and services provided. The notes field also allows users to record the time spent with a client or working on behalf of a client.

#### <u>Steps</u>

- 1. In a Person's record go to the Notes Tab.
- 2. Select Create New Note.
- 3. Check date is correct and change if required.
- 4. Select Contact type from the drop down menu.
- 5. Add **notes** into the notes field.
- Add contact length in minutes if required. (Contact=direct client contact; Case work=work on behalf of the client; Travel=time spent travelling without the client).
- 7. Select Save.

C Infoxchange	ACME S	upport Services / DOW Female, DOB:	25/02/1975 (Age 40 yrs)	Jan	e Sm	ith
Home	Search	Details Notes Alerts	Referrals 3 Check date is correct		P	Menu
Persons	Notes:		Filter Create New Note OO Edit Note Details			
Reports			No Notes to display Date 20/11/2015			
Admin		1. Go to the Notes tab				
🖯 🔁 Recent List			Contact type     Clent meeting     A Select Contact T	ype menu		
Jenny Dow Jane Doe			2. Select Create New Notes			
John James John Jones			Note Met with Jenny and accompanied her to an appointment at			
			5. Add notes			
			Chris Brown Partner			
			May be viewed by  Workgroup  Cluster			
			Contact length Contact Case Work Travel required	h if		
			May be efited to 0//12/2015			
			Last update			
			Save Save Final 7. Save			

## 8 Create an Alert

Alerts flag significant issues around safety and/or health issues and can be added to a client's record. The Alert icon, either blue or red, are clearly visible as soon as the client record is opened.

- 1. Go to the Alerts Tab.
- 2. Select Create new alert.
- 3. Choose an Alert type.
- 4. Record details in the Notes field.
- 5. Select Save.



Infoxchange	ACME Support Services Jenny DOW Female, DOB: 25/02/1975 (Ag	ge 40 yrs)		Jane	Smith
Home	Search Details Notes Alerts Referrals				Menu
Persons	Alerts:	Filter Create New Alert	Edit Alert Details		
Reports	No Alerts to disp	blay	Date 20/11/2015		
Admin	1. Go to the Alerts tab	2. Select Create new alert	* Worker/s alane Smith, ACME Support Services * Alert type At risk of violence Notes	pe 1	
John James John Jones			Reported by both Jane and the local Police, Jane is at risk of violence from a former partner.		
			This note is also associated with (tick): Chris Brown Partner		
		Note the review and expiry dates are generated automatically	Review date 19/02/2016  Expiry date 20/05/2016  Last update		
			Save		

- 1. To activate the alert icon **A** click on the **Details Tab** to launch to the **Alert Record**.
- 2. Click on the alert icon 4 to go to the Alert Tab.

Infoxchange	ACME Support	rt Services )W Female, DOB: 25/02	/1975 (Age 40 yrs)	2. Alert icon will appear.
Home	Search Deta	<mark>ils</mark> Notes Alerts Referi	take users to the Alerts	
Persons	Person / Ali	as:		tab.
Reports	Jenny Dow	1. Click on the Details	Primary Name	
Admin	Relationship	tab to reboot the record		Create new relationship
🖯 🕻 Recent List	Person	Relationship	DOB	Comments
Jenny Dow John Jones	Chris Brown	Partner	02/10/1976	
Holly Holliday Jane Doe	Address:			Create new address View Prior
John James	Street	Locality	Туре	Comments
	✓ 113 Abbot	tt Street CAIRNS QL	.D 4870 Tempo	orary 💡

# 9 Sending a Referral to another service

Users are able to copy a Referral and send the referral to another service. Please note:

As part of your User Agreement, you as the service provider have agreed to directly action Police Referrals. It is expected that directly actioning a Police Referral would not include sending that referral to another service.

Services using SRS Queensland Connect will be able to electronically on refer to any service in the QPS referral network.

Users will only be able to send a referral electronically to services in their own service directory. This will differ from service to service.

Services using other SRS/SHIP databases will only be able to electronically refer to services in their own referral networks (if any).



All services will be able to search the Infoxchange Service Directory and create manual referrals. These referrals will need to be exported to PDF and then faxed to the other service.

9.1 Sending a QPS Referral to another agency - electronically

#### <u>Steps</u>

- 1. Go to **Client Record** from the **Recent List** or using **Search** on the **Persons Page**.
- 2. Go to the **Referral tab.**
- 3. Select the referral to forward from the list by clicking on the paper and pen icon
- 4. The **Referral Form** will open.

Infoxchange	ACME Support Services Henry Hill Male, DOB: 01/1	12/1930 (Age <u>85 yrs)</u>			Jane Smith (Coordinator)
Home	Search Details Notes Alerts	Referrals 2. Go to the Refe	erral tab		
Persons	Referrals		Create new Referral	4. Referral Opens	
Reports Admin	Id Referral Status Fror Date	n	То	Meta Data	
E 2 Recent List	6319 01/12/2015 Accepted Quee	INSIAND POlice Service - SOUTHBANK	ACME Support Services ACME Community Company	Referral sent 01/12/2015 12:19:16 Status Accepted	
Sandy Southside Holly Holliday John James	3. Click c	on the blue pencil to open the referral		Restriction  Workgroup Limited Cluster	
Jane Doe 1. So John Jones	elect person record			From Queensland Police Service - SOUTHBANK STATION 🗄	

5 Scroll to the bottom of the form and select Copy.

Referral History		
Contact attempt: 1;		
Referral accepted by Jane Smith, ACME Support Services 12:20pm Tue 01/12/15		
Called Henry and there was no answer.		
Referral updated by Jane Smith, ACME Support Services 12:20pm Tue 01/12/15		
Contact attempt: 2; Two staff members cold called Henry at home. Henry was home. We talked through service options. Henry said he would prefer to see workers at River City. Referral updated by Jane Smith, ACME Support Services 12:22pm Tue 01/12/15		
Comments may be viewed by the QPS Referral Coordination Service		
Contact Attempts $1 \checkmark 2 \checkmark 3 \ 4 \ 5 \ 6 \ 7 \ 8$		
Service Provider Action	5. Scroll to the	bottom of
Comment	the Referral F	Form and
ii.		
Update PDF Copy		

A message will appear confirming that you want to copy the referral.



1

If you have made any changes to this referral you should save th to make the copy	hem first before copying. Click Cancel to go back and save them, or OK
	Select OK OK Cancel

- 5. A new form appears with the heading 'For copied referral' select SRS External.
- 6. Enter the service, organisation or Suburb in the Send Referral to field. Users are searching for services within the Police Referrals network or their own referral networks. (see start of Chapter 9 of the guide for any further information).
- 7. After selecting a service, Service Details will appear.
- 8. Select Submit and the Referral Form will expand pre-populated with the information from the original QPS Referral.

Infoxchange	ACME Support Ser Henry Hill Ma	rvices ale, DOB: 01/12/1930 (Age 85 yrs)			Jane Smith (Coordinator)
Home		Notes Alerts <mark>Referrals</mark>			nu
Persons	Referrals		Create new Referral	For copied referral	Select SRS External     7. Enter a service name, organisation or
Reports	Id Referral	Status From	То	◯ Search ◯ Favourites ◯ Manual ④ SRS External	8. Service details will appear for the
Admin	Date	Assessed Output and Balling Consider COUTURABIL	ACME Compart Constant	Send referral to River City Support	chosen service
C Recent List     Henry Hill	<u></u> 6319 01/12/2015	STATION <i>QPS</i>	ACME Support Services ACME Community Company	Submit	
Sandy Southside				Service Details	
John James				Service Name River City Support	9. Select Submit and the Referral form
Jane Doe				River City Inc	
Jenny Dow				Address Brisbane	

- 9. Data under the Referred Issue/s banner is taken from the original QPS Referral and can be amended or added to.
- 10. Go to Referral History at the end of the form and add in a Comment which will be seen by the service receiving this referral.
- 11. Save Draft.
- 12. Select **Send.** This will send the referral electronically to the other service.



Referred Issue/s	
Significant issues	
Category: Alcohol misuse Subcategory: Support for person with alcohol dependency	
Category: Homelessness Subcategory: At risk of homelessness	
Contributing issues	10. Data under the Referred Issue/s is taken from the original QPS referral and maybe edited or added to.
Issues Assessment	
Q: Does the client have dependent children under 18? A: No	
Q: Provide details of children (number, age of children)	
Vulnerability Assessment	
routine	
	]
Attachments   Referral History	11. Add in a comment to be seen by the on-referred service
Comments may be viewed by the QPS Referral Coordination Service	
Comment	
We would appreciate it if you would accept this referral to see Henry.	12. Save draft 13 Select Send
Save Draft Send	

After hitting Send, a message will appear on the screen asking you to select Ok to send the Referral.

Are you sure you wish to se	and this referral?
Select OK	
ок	Cancel

Users will monitor the status of the referral by going to the Referrals Tab on the Home Page.



🗘 Infoxc	Australia hange	ACME S	Supp e Re	ort Services eferrals			Referra	als Tab		
Hom		My List	Теа	im List Refer	rals 155 Di	rectory	Sent S	Subtab		
Persor Repor	5	Receiv	ved	Accepted	Declined	Sent Dra	ft			
Admir	1	Search	resul	lts						
B 2 Recent	Lis	I	d †	Send Date	Status	Sent From	Sent To	Sent By	Client	Vulnerability Assessment
Home Pag	ge		322	01/12/2015 14:03:19	Waiting	ACME Support Services	River City Support	Jane Smith	Henry Hill DOB: 01/12/1930 Postcode: 4101	High
Holly Hollida Henry Hill Jane Doe	y		282	$\underline{\Pi}$	Waiting	ACME Support Services	River North Support	Jane Smith	Holly Holliday DOB: 02/02/1970 Postcode: 4101	Routine
	Cheo refer accept	ck the s ral, opti ed, dec	tatus ons i linec	of the include d, waiting	Waiting	ACME Support Services	River City Support	Jane Smith	Holly Holliday DOB: 02/02/1970 Postcode: 4101	Routine
, c			_			1 t	:0 3 of 3			2

## Updating the Original QPS Referral with Service Provider Action

Once the referral has been accepted by the other service, users must update the original QPS Referral indicating that the client has been on referred.

- 13. In the client record, go to the Referrals tab
- 14. Select the original **QPS Referral** and click on the pencil icon to open.

Infoxchange	ACME Support Ser Henry Hill Mal	vices le, DOB: 01/12/1930 (Age 85 y	yrs)		Jane Smith (Coordinator)
Home		otes Alerts Referrals			Menu
Persons	Referrals	14. G Tab ir	o to the Referrals n the Client's record Create new Referral	Referral Form opens	
Reports	Id Referral Date	Status From	То	Meta Data	
15. Click on the pencil to pen the original QPS referral	3 6319 01/12/2015 6322 01/12/2015	Accepted Queensland Police Service - STATION QPS Waiting ACME Support Services ACME Community Compan	SOUTHBANK ACME Support Services ACME Community Company River City Support ny River City Inc	Ton Queensaha Police Service SouthExivity U To ACME Support Services Service ACME Support Services Organisation ACME Community Company	
	J			For Henry Hill	

- 15. Scroll to the bottom of the Referral Form and select an option from the Service Provider Action drop down menu.
- 16. Add a Comment.
- 17. Select Update.



Referral History	
Referral accepted by Jane Smith, ACME Support Services 4:12pm Fri 20/11/15	
Contact attempt: 1; Rang Holly and left message Referral updated by Jane Smith, ACME Support Services 4:12pm Fri 20/11/15	
Contact attempt: 2; Holly visited the office. We discussed the services provided by our agency. Holly requested a referral to another agency. We are currently investigating other referral options for Holly.	
Referral updated by Jane Smith, ACME Support Services 4:14pm Fri 20/11/15	
Referral updated by Jane Smith, ACME Support Services 4:14pm Fri 20/11/15	16. Select an option from the Service Provider Action Drop
Comments may be viewed by the QPS Referral Coordination Service	Down Menu
Contact Attempts 1 🗸 🗸 3 4 5 6 7 8	
Service Provider On referred	17. Add a comment
Comment	
River City has accepted this referral for Holly. Holly has been advised.	18. Soloot Lindato
Update DDF Copy	

## 9.2 Sending a QPS Referral to another service - manually

Users can send a QPS Referral to another service by the manual method of exporting the Referral Form to a PDF and faxing it to another service. Users choose from one of two methods to input the details of the service they are sending the referral to.

To copy the QPS Referral users undertake the following steps:

#### <u>Steps</u>

- 1. Go to **Client Record** from the **Recent List** or using **Search** on the **Persons Page**.
- 2. Go to the **Referral tab.**
- 3. Select the referral to forward from the list by clicking on the paper and pen icon
- 4. The **Referral Form** will open.

Infoxchange	ACME Support Services Henry Hill Male, DOB: 01/12/1930 (Age 85)	yrs)		Jane Smith (Coordinator)
Home	Search Details Notes Alerts Referrals 2.0	Go to the Referral tab		
Persons	Referrals	Create new Referral	4. Referral Opens 3	
Reports	Id Referral Status From Date	То	Meta Data	
E 2 Recent List	C 6319 01/12/2015 Accepted Queensland Police Service - STATION	SOUTHBANK ACME Support Services ACME Community Company	Referral sent 01/12/2015 12:19:16 Status Accepted	
Sandy Southside Holly Holliday John James Jane Doe John Jones	3. Click on the blue pencil to referral	o open the	Restriction () Workgroup () Limited () Cluster Consent to send Yes From <i>Queensland Police Service - SOUTHBANK STATION</i> ()	

5. Scroll to the bottom of the form and select Copy.



Referral History	
Referral accepted by Jane Smith, ACME Support Services 4:12pm Fri 20/11/15	
Contact attempt: 1; Rang Holly and left message Referral updated by Jane Smith, ACME Support Services 4:12pm Fri 20/11/15	
Contact attempt: 2; Holly visited the office. We discussed the services provided by our agency. Holly requested a referral to another agency. We are currently investigating other referral options for Holly.	
Referral updated by Jane Smith, ACME Support Services 4:14pm Fri 20/11/15	
Referral updated by Jane Smith, ACME Support Services 4:14pm Fri 20/11/15	
Comments may be viewed by the QPS Referral Coordination Service	
Contact Attempts $_1 \checkmark _2 \checkmark _3 \4 \5 \6 \7 \8$	
Service Provider Action	$\checkmark$
Comment	5. Scroll to the bottom of the form and select
Update PDF Copy	Сору

A new form headed 'For copied referral'. Users have two methods of inputting the details of the service that the referral will be sent to:

- By Selecting Manual, Service details can be manually typed into the form
- By Selecting Search, Users can search the Infoxchange Service Seeker to find a service to send the referral to. Choosing a service from Service Seeker results in the service details being pre-populated into the referral.

#### <u>Steps</u>

To manually enter the service details:

- 1. Select the **Manual** button.
- 2. Enter the Service Name and contact details.
- 3. Select **Submit** and the **Referral Form** will expand pre-populated with the information from the original **QPS Referral**.

C Infoxchange	ACME Support Services Henry Hill Male, DOB: 01/12/1930 (Age 85 yrs)		Jane Smith (Coordinator)
Home	Search Details Notes Alerts <mark>Referrals</mark>		1. Select Manual Menu
Persons	Referrals	Create new Referral For copied referral	0
Reports	Id Referral Status From To	Search Favourites Manual SRS External	
Admin C Recent List Henry Hill Sandy Southside Holly Hollday John James Jane Doe John Jones Jenny Dow	Date     Date       Image: Constraint of the second	City Support City Jinc Service Name River North Support Support Services Community Company Phone 9999-0000 Fax Email referrals@RNCC.org.aul Submite	2. Enter Service Details 3. Select Submit



#### <u>Steps</u>

To use Infoxchange Service Seeker to locate a service:

- 1. Select Search and enter search terms. Select Search button.
- 2. Scroll down the page to assess the search returns.
- 3. Select a service by selecting 'make a referral' button.

	Henry Hill Male, DOB: 01/12/1930 (Age 85 yrs)		1. Select Search
Home	Search Details Notes Alerts <mark>Referrals</mark>		Enter Search terms Menu Select Search button
Persons	Referrals	Create new Referral	For copied referral
Reports	Id Referral Status From Date	То	search Favourites Manual SRS External     SRS external     SRS external     SRS external
Family name search	<sup>C</sup> 6322 01/12/2015        Watting ACME Support Services ACME Community Company <sup>C</sup> 6319 01/12/2015        Accepted Queensiand Police Service - SOUTHBANK STATION <i>QPS</i>	River City Support River City Inc ACME Support Services ACME Community Company	4101 alcohol adult mail       Search       Clear       to assess Search         Search Results from Service Seeker       Image: Clear       Image: Clear       Image: Clear         Image: Clear       <

After users either input the service details or select the service via Service Seeker, the steps to complete the referral are the same, as detailed below:

- 4. Amend or add to the information in the **Referred Issue/s** fields.
- 5. Scroll down to the **Comment** box and add in a message that will be seen by the service receiving the referral.
- 6. Select Waiting.



Referral	0			
Attachments not	copied. Kindly upload attachments again.			
Meta Data				
From ACME Suppo	ort Services 🕀			
To Support for Alc	oholics 🛛			
Service	Support for Alcoholics			
Organisation				
Phone	(07) 3255 9962			
Fax	(07) 3392 6430			
Email	admin@csobrisbane.org			
For Henry Hill				
Referred Issue/s	Significant issues	4. Amend or add to the		
Category: Alcohol Subcategory: Supp dependency	misuse port for person with alcohol	information in the Referred Issue/s fields		
Category: Homele Subcategory: At ri	ssness sk of homelessness		,	
Q: Does the client A: No	Issues Assessment have dependent children under 18?			
Q: Provide details children) A: routine				
Attachments				

- 7. After selecting Waiting, the comment is saved under the Referral History banner and new buttons appear at the end of the form.
- 8. Select **PDF** in order to save, print or fax the **Referral Form**, follow the instructions on your browser regarding saving the PDF.



Referral History	
We would appreciate it if you would accept this referral for Holly. Our Referral Officer Jane Smith will follow up by phone. Referral sent by Jane Smith, ACME Support Services 6:01pm Sat 21/07/15	7. Comments are saved under Referral History.
Comments may be viewed by the QPS Referral Coordination Service	
Comment	8. Select PDF in order to save, print or fax the Referral Form.

9. Select the **Accepted or Declined** Buttons when notified of the outcome of the referral.

Referral History	
We would appreciate it if you would accept this referral for Holly. Our Referral Officer Jane Smith will follow up by phone. Referral sent by Jane Smith, ACME Support Services 6:01pm Sat 21/11/15	
Comments may be viewed by the QPS Referral Coordination Service	
Comment	<ol> <li>Select Accepted (or declined) when notified of the outcome of the referral.</li> </ol>

Once the referral has been accepted by the other service, users must update the original QPS Referral indicating that the client has been on referred.

Refer to steps 14-18 in Chapter 9 Updating the Original QPS Referral with Service Provider Action.

# 10 Reports and Lists

Users are able to generate both reports and lists from the **Reports Page** within SRS Queensland Connect. Reports are aggregated data, for example, total number of males and females. Whereas lists generate unit level data and in this example would list each male and each female.

Reports are useful to monitor trends and report on service activity. Users can generate a report about the referrals received and analyse trends related to the demographics of people being referred.

10.1 Generate a Report about Referrals Received

- 1. Go to the **Reports Page.**
- 2. Go to the **Referrals Tab.**
- 3. Select Service and Report Type from the **drop down menu.**
- 4. Select **Report Period**
- 5. Select 'Generate Report'.



Infoxchange	ACME Support Services Police Referrals 2. Go to the Referrals Tab
Home	Reports Lists Referrals Results
Persons	Workgroup ACME Support Services V
Reports 📐	Services ACME Support Services Report Type
Admin	Report type Referrals Received
1 Co to the Ren	Report period This Month 4. Select report period
Page	Start date 01/11/2015 End date 22/11/2015
L	Generate Report 5. Select Generate Report

The Referral Report is generated and is available to view on the Results tab.

- 6. Go to the **Results tab** on the **Reports Page.** Reports generated will be listed.
- 7. Select the report to view and click on 'View Report'.

C Infoxchange	ACME Support S Police Refer	ervices r <b>rals</b>		6. Go to	the Results tab		(		
Home	Reports Lists I	Referrals	Results	on the	Reports page		7. Se	ect report and clic	k
Persons	<b>5</b> 1	<u></u>						n view Report	
Reports	Display:	• му керс							
A dura in	Report/List ID	Run By	Processing Time	Date Rang	e Workgroup	Туре	Included persons / Report Title	Actions	
Admin	Report 56 22/11/2015 08:35	Jane Smith	22/11/2015 08:35 0.760486 secs	From: 01/11/2 To: 22/11/2	2015 ACME Support Ser 2015	rvices Referrals Received	Report on Referrals Received	Delete View Report Report	

- 8. The **Referral Report** opens and is displayed on the **Results tab**.
- 9. To export the list to Excel, click on the **Excel icon.**
- 10. To navigate away from this page, click on **Back to Report Results List** and users will be returned to the **Results tab**.



Australia		an ant Carr					
Infoxchange	ACME SUP Police	port Ser <b>Referr</b>	vices als				
Home	Reports	Lists Re	ferrals Re	esults	/	9. Click on the Excel	icon to export
Persons	Back to Re	eport Resul	ts List De	lete this Report		list to Exc	el
Reports	Report on	referrals	received b	y ACME Suppo	rt Services	s (with service ACME Suppo	
Admin				Referred f	om		Number of Referr
		Queenslar	nd Police Se	rvice - BRISBANE		TION TEAM 1 [QPS]	3
	Queenslan	d Police Se	ervice - SOL	TH BRISBANE DI	STRICT CRI	ME SUPPORT SERVICES [QPS]	1
10. Click on	Queenslar	nd Police Se	ervice - REG	IONAL CRIME AN	D INTELLIG	ENCE COORDINATOR BR [QPS]	1
Back to				Total			5
Report	Referral S	Status Nu	mber of Re	ferrals			
Results List	Waitir	ng	2				
to navigate	Accep	ted	3				
page	Tota	il	5				
page	Reason R	eferral De	clined Num	uber of Referral	5		
		Total		0			
	Gender N	lumber of	Referrals				
	female	3					
	male	2					
	Total	5					
	Age Ran	ge Numb	er of Refer	rals			
	36 - 45 ye	ears	2				
	26 - 35 ye	ears	3				
	Total		5				
	Indigeno	us Status	Number of	Referrals			
	Neit	ther	3				
	Bo	th	2				
	То	tal	5				
	Country of	of Birth Nu	mber of R	eferrals			
	Not rec	orded	5				
	Tota	al	5				
	Preferred	Lanaguag	je Number	of Referrals			
	Not r	ecorded		5			
	Т	otal		5			
	Suburb	/ Town	Number o	f Referrals			
	SOUTH E	BRISBANE		1			
	SOUTH BR	ISBANE BC		1			
		ital		>			
	Postcode	Number	of Referrals				
	4101 Total		5				
	Total		J				

# 11 User Preferences

All users are able to complete their details in the **Preferences tab** on the **Admin Page** and change their **passwords.** 

User Preferences are found on the **Preferences Tab** of the **Admin Page.** The cog icon on the upper right hand side of the page will also take users to the **Preferences Tab**. Users who provide their Email Address and answer the Security Question on the **User Preferences Tab** will have access to the reset password function in the event that a password is forgotten.

- 1. Go to the **Preferences Tab** on the **Admin Page**.
- 2. Complete the Email address, and other details.
- 3. Answer the **Security question.**



- 4. Indicate whether you wish to subscribe to email updates from Infoxchange.
- 5. Select Save.

Australia Australia	ACME Support Services Police Referrals
Home	Password Preferences About Tab on the Admin Page
Persons	
Reports	User Preferences for Jane Smith
Admin	Email Address
	Phone
	Mobile 2. Complete the email address and other details.
	Fax
	Title
	Position 3 Answer the
	Organisation Security
	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 license? $\checkmark$
	Security response
4. Indicate if you wish to receive email updates	Your email address recorded in SRS may be used by Infoxchange to communicate with you regarding scheduled SRS downtime, feature upgrades or tips on the effective use of SRS. If you do not want Infoxchange to use your email for this purpose please tick the box below.
	Save Cancel 5. Save

# 11.1 Change password

The first time users log in the message below may appear on the screen. It prompts users to change their password.

Important: You must update your details. - A security question must be selected with a proper response.
ОК



#### <u>Steps</u>

- 1. Go to the Password Tab on the Admin Page
- 2. Fill in a new password. **Passwords** must contain at least 8 characters including one upper-case letter, one lower-case letter and one number
- 3. Select Save



## 11.2 User Administration-Coordinator Functions

Within the SRS Police Referrals System, there are two types of system users:

- Normal Users who have access to the Home, Persons, Reports Page. Normal Users also have access to the Password, Preferences and About tabs on the Admin Page.
- Coordinators have access to all the pages and tabs described above as well as the Users, Merge and Audit tabs on the Admin Page. Coordinators are able to set up new users and to assist users whose accounts have been blocked.

The Users Tab within the Admin Page provides access to the User Administration functions.

lnfoxchang	Police Referrals	s			
Home	Password Preference	s <mark>Users M</mark> erge Audit	About		
Persons	Cluster ACME	Support Service			
Reports	Workgroup All w	rorkgroups			
Admin	View Curr	rent Users 🗸 🗸	Users Tab		
	Search				
	Go				
					Add new user
Admin	User Name †	User	Date Commenced	End Date	Last Logon
Page	Amodha	Amodha Ratnayeke	01/07/2007		01/12/2015
	gerard	Gerard Palk	01/07/2007		01/12/2015
1	glenden	Glenden Woodworth	30/11/2015		01/12/2015
1	Jamie.Smith	Jamie Smith	30/11/2015		30/11/2015
	Jane-Smith	Jane Smith	18/11/2015		01/12/2015
	mary.smith	Mary Smith	30/11/2015		30/11/2015
1	michelle.hollywood	Michelle Hollywood	06/11/2015		30/11/2015
	usertesting	User Testing	26/11/2015		30/11/2015
			1 to 8 of 8		

## 11.3 Creating a New User

The process of creating a new user involves three steps:

Creating the new User Name.

Allocating the new **User Name** to a workgroup. Failure to allocate the **User Name** to a workgroup will result in the user not being able to access the required functions and records within the application.

Allocating the correct access level.

To create a new User:



#### <u>Steps</u>

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

Add new user:		8
* User Name	Firstname.Lastname	
* First Name	Firstname	
* Last Name	Lastname	
Email Address		
* Default Cluster Start Date * New Password	Help Desk Screenshots 30/09/2014	
* Confirm Password	•••••	
User Blocked Change password		
Last Update	_	
	Save	

- 2. Enter the new User Name (User id). Please note that:
  - The User Name is case sensitive.
  - It is recommended that the naming convention of 'Firstname.Lastname' be followed. For example, if the user's name is John Smith, the new **User Name** should be 'John.Smith'.
  - The **User Name** can consist of letters, numbers, and the '-' (dash) and the '.' (dot) characters. No other characters or symbols are permitted.
- 3. Enter the **First Name** and **Last Name**.
- 4. Enter the **New Password** and re-enter the password in **Confirm Password**. The password must be at least eight characters in length and contain both letters and numbers.
- 5. Ensure that the **User Blocked** checkbox is not ticked.
- 6. Tick the **Change Password** checkbox which will force the user to change their password when they first log into the application.
- 7. Click **Save**. The User account has been saved.
- 8. To allocate access to a Workgroup, make a selection from **Add to workgroup** list (highlighted below) and click **Save**.



dit user recor	d:
* User Name	Firstname.Lastname
* First Name	Firstname
* Last Name	Lastname
Email Address	
* Default Cluster Start Date New Password Confirm Password User Blocked Change password	Help Desk Screenshots 30/09/2014
A new user has bee workgro	en created. You must now add them to a oup to complete the process.
Add to workgroup	Please select
Last Update	Admin A, ACME Homelessness Service 30/09/2014 10:35:47

9. The access level for the Workgroup will default to 'Normal User'. If a different access level is required, select the correct access level from the list (highlighted below). Most users should be given 'Normal User' access level. Managers and team leaders may be given 'Coordinator' access level. Administration workers who are responsible for adding users and running reports may be given 'Administrator' access level. (Identifiable client data cannot be viewed with the 'Administrator' access level).

Edit user re	cord:	
* User N	ame Firstname.Lastname	
* First N	ame Firstname	
* Last N	ame Lastname	
Email Add	Iress	
	<u>c</u>	
* Default Clu	Ister Help Desk Screenshots	
Start	Date 30/09/2014	
New Pass	word	
Confirm Pass	word	
User Blo	cked	
Change pass	word 💌	
Workgroup	Role Operational Remove	
ACME Homelessness Service	Normal User 🔹 🗶	
Add to workg	roup Please select 🔻	
Last Up	date Admin A, ACME Homelessness Service 30/09/2014 10:37:19	
	Save	

- 10. If the user needs access to another workgroup, make another selection from the **Add to workgroup** list at the bottom of the form and assign the required access level.
- 11. If the user is a manager who is not an 'operational' member of the workgroup, uncheck the Operational check box (highlighted below) so that their User Name does not appear in the 'worker' drop down lists throughout the application. For the majority of users, this should remain checked.



Edit user re	cord:		1			
* User N	ame Firstname	Lastname				
* First N	ame Firstname	Firstname				
* Last N	ame Lastname	Lastname				
Email Add	Iress					
Confirm Pass User Blo Change pass	Note 30/09/201. word word cked word word %	4	]			
Workgroup	Role	Operation	nal Remove			
ACME Homelessness Service	Normal User		×			
Add to workg	roup Please se	lect	•			
Last Up	date Admin A, A 30/09/201 Save	CME Homelessn 4 10:37:19	ess Service			

## 11.4 Resetting a Password for a user

#### To reset a user's password:

#### <u>Steps</u>

1. Open the Edit user record form by selecting the User Name from the list on the left of screen.

Edit user recor	d:		B
* User Name	Firstname.Lastname		
* First Name	Firstname		
* Last Name	Lastname		
Email Address			
	e.		
* Default Cluster	Help Desk Screenshots		
Start Date	30/09/2014		
New Password			
Confirm Password			
User Blocked			
Change password			
Workgroup Ro	le Operation	al Remove	
ACME Homelessness Service	ormal User 🔻	×	
Add to workgroup	Please select	•	
Last Update	Admin A, ACME Homelessne 30/09/2014 10:37:19	ss Service	
	Save		

- 2. Enter the **New Password** and re-enter the password in **Confirm Password**.
- 3. Tick the **Change Password** checkbox (highlighted above) which will force the user to change their password the next time they log into the application.



#### 4. Click Save.

## 11.5 Unblocking a User Account

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

Edit user recor	Edit user record:					
* User Name	Firstname.Lastname					
* First Name	Firstname					
* Last Name	Lastname					
Email Address						
	<u>c</u>					
* Default Cluster	Help Desk Screenshots					
Start Date	30/09/2014					
New Password						
Confirm Password						
User Blocked						
Change password						
Workgroup Ro	le Operationa	l Remove				
ACME Homelessness Service	ormal User 🔻	×				
Add to workgroup	Please select	•				
Last Update	Admin A, ACME Homelessnes 30/09/2014 10:37:19 Save	ss Service				

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

## 11.6 Removing User Access

To remove the active user account from the system:

#### <u>Steps</u>

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



Edit user reco	ord: 🖺
* User Nam	e Firstname.Lastname
* First Nam	e Firstname
* Last Nam	e Lastname
Email Addres	s
* Default Cluste Start Dat New Passwor Confirm Passwor User Blocke Change passwor	Help Desk Screenshots 30/09/2014 d d d d d
Workgroup F	tole Operational Remove
ACME Homelessness Service	Normal User 🔹 💌
Add to workgrou	P Please select
Last Updat	Admin A, ACME Homelessness Service 30/09/2014 10:37:19 Save

- 2. Click the Remove cross (highlighted above) for all listed Workgroups.
- 3. Once all workgroups have been removed, the **Remove User** button (highlighted below) will be displayed.

Edit user record	d:
* User Name	Firstname.Lastname
* First Name	Firstname
* Last Name	Lastname
Email Address	
* Default Cluster Start Date New Password Confirm Password User Blocked Change password	Help Desk Screenshots 30/09/2014
The us	er is not in any workgroup.
Add to workgroup	Please select
Last Update	30/09/2014 10:42:51 Save Remove User

4. Click Remove User.



5. The **user account** will be removed as an active user but all database references to the user will be retained. For example, association with case notes.

If you don't want to remove the active user account from the system but do want to remove access for a period of time, tick the **User Blocked check box**. The user will not be able to log in to the application.

# 12 Merge Duplicate Records

SRS Queensland Connect has the ability to merge duplicate records if users find duplicate person records for the same client. Extensive online help is available to support Coordinators use the Merge Duplicates functions. The screenshot below shows where to find online help.

- 1. Go to the Admin Page
- 2. Go to the Merge Tab
- 3. Click the Question Mark icon to open the online help in a new browser tab

Australia ACME Support Services Jane Smith (Coordinator)				
Home	Password Preferences Users Merge Audit About	3. Click the guestion	lenu	
Persons	Nerge Persons (Search Duplicates)	mark icon to open online	<b>*</b> 0	
Reports	search for primary record: 2. Go to the Merge	help in a new browser tab		
Admin	Green Name Tab			
1. Go to the Admin Page				