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

	Domestic and Family Violence
	Family Law
Mental Health	Support for person with mental health issues
	Support for family/carer
Office of Fair Trading	General consumers
	Motor vehicles
	Real estate
	Security Providers
Parenting Children/Youth	Difficult behaviour
	Family conflict
	Bullying
	Truancy
Personal counselling	Relationship support
	Emotional and mental wellbeing
	Anger management
	Grief counselling
Road Trauma	Support for family/friends/driver
Sudden Death Support	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
Suicide prevention - non emergency	Support for a person who may be suicidal (non-emergency)
	Support for family/carer
Support for Youth	Bullying
	Drug / alcohol misuse
	Mental Health (suicide prevention / self-harm / anxiety / depression)
	Recreational Activities for Youth
	Other
Victim Assist - Financial Assistance for violent crimes	Financial assistance for violent crimes
Victim Support	Sexual offences
	Other offences against the person
	Anti-discrimination
	Victim of Offender with Mental Illness

SRS POLICE REFERRAL SYSTEM

The purpose of the SRS Police Referral system is to process referrals by Queensland Police Officers to non-government 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: https://srs-qldconnect.infoxchangeapps.net.au/. 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:

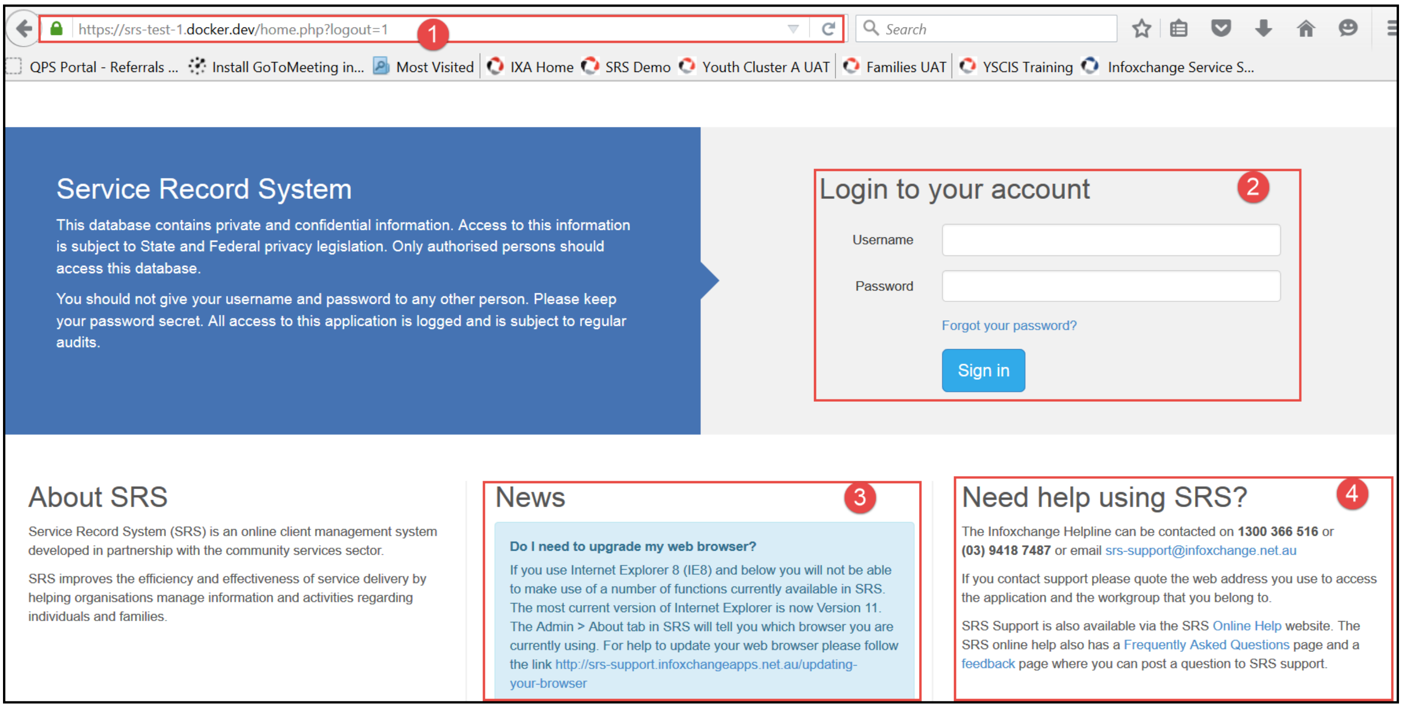
1. Type the URL into the browser.

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.

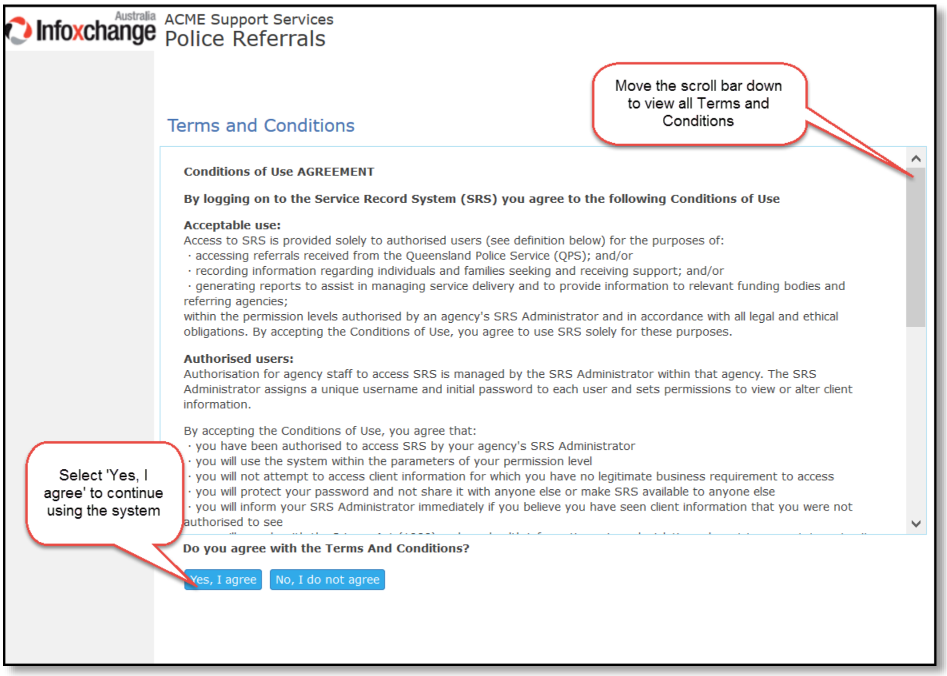
4. Support options are listed under the **'Need help using SRS?'** heading. The SRS Queensland Connect User Manual link will be available here.

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



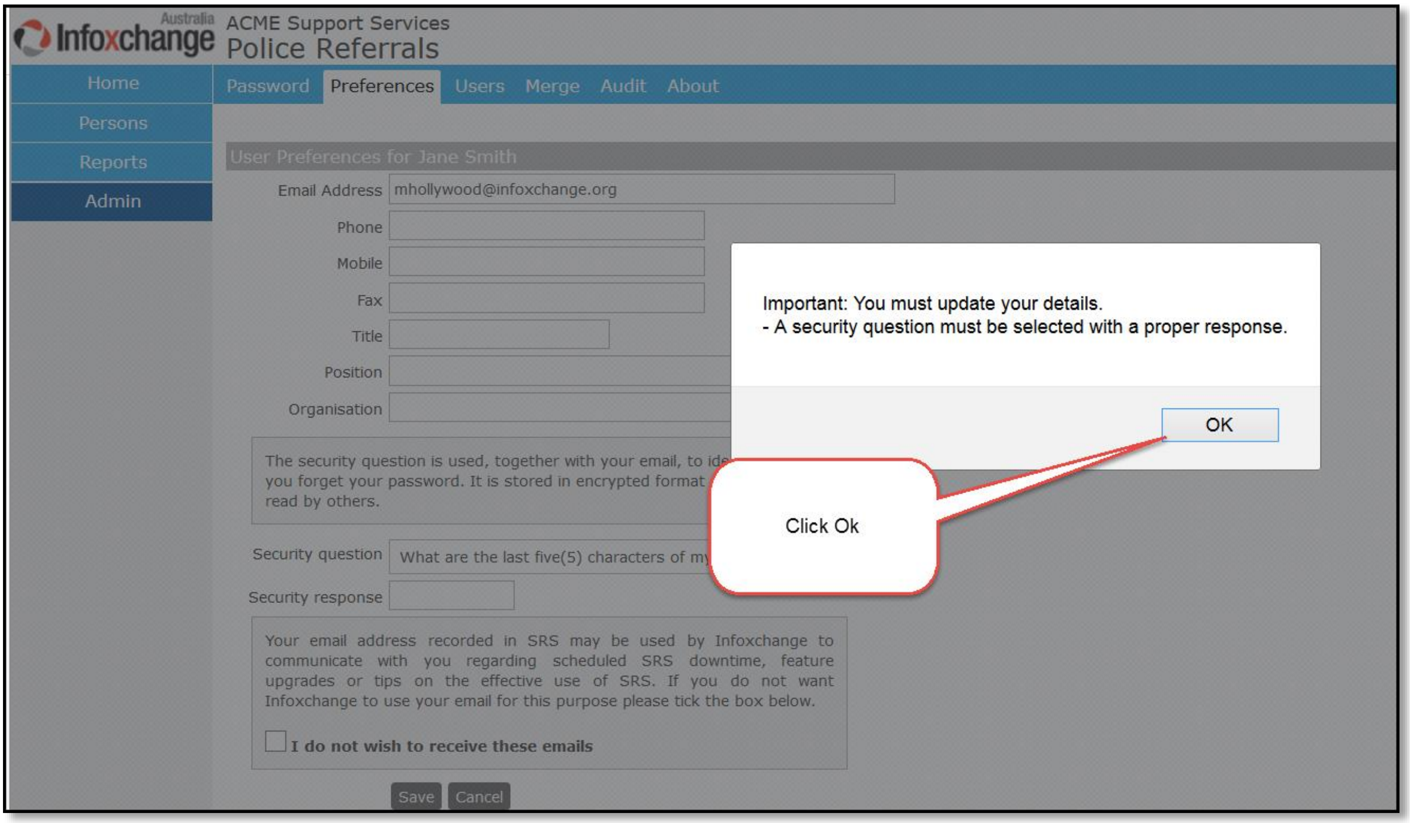
3.1 Logging in for the first time

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.



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.

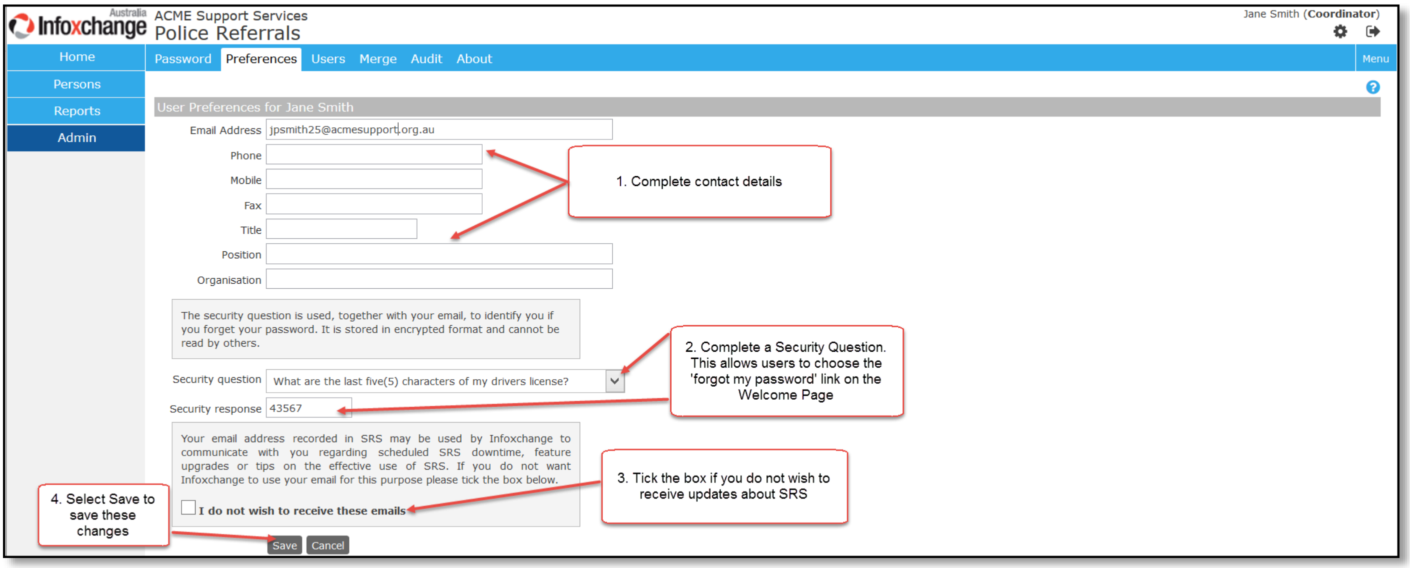


After clicking Ok, users are taken to the Preferences Tab on the Admin Page.

Steps

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.

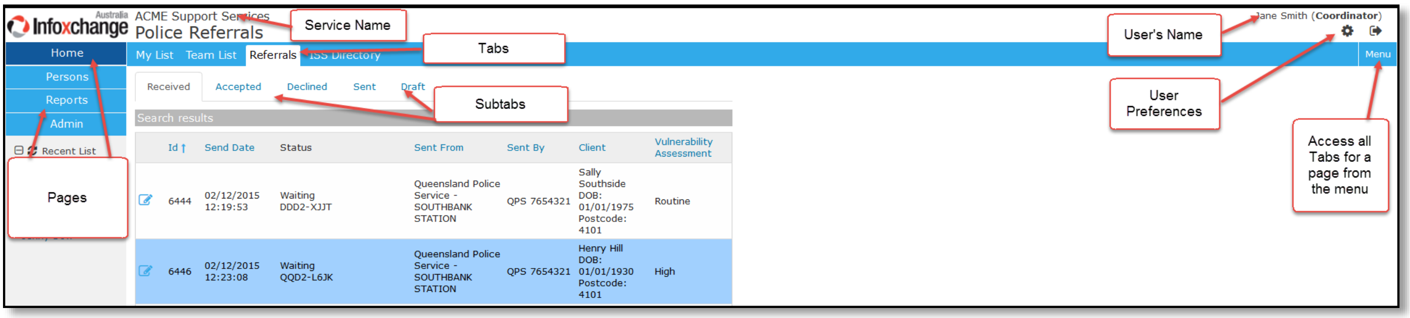


3.2 Navigating SRS

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.



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

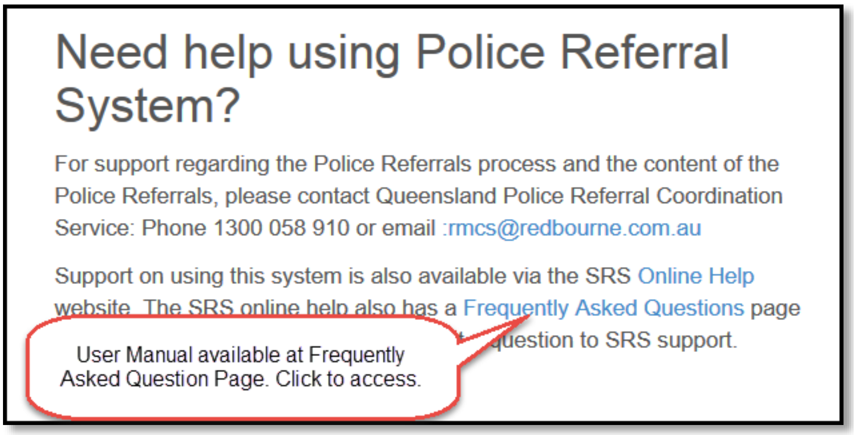
For support regarding the Police Referrals process and the content of Police Referrals, please contact Queensland Police Referral Coordination Service:

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

Email rmcs@redbourne.com.au

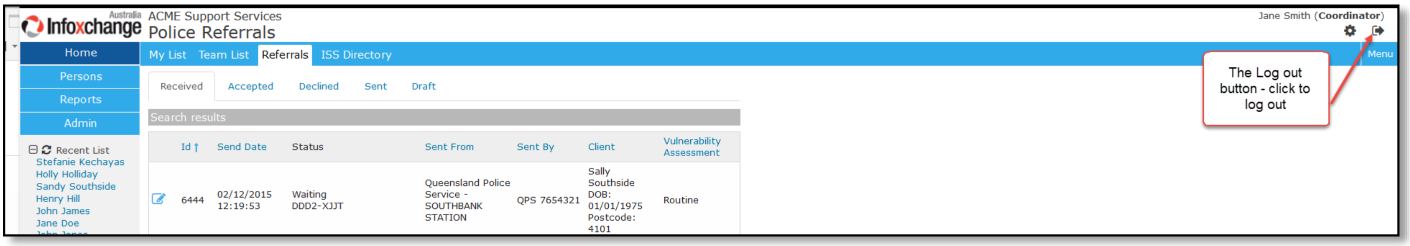
3.4 Finding the SRS Queensland Connect User Manual

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'**.



3.5 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 SRS.

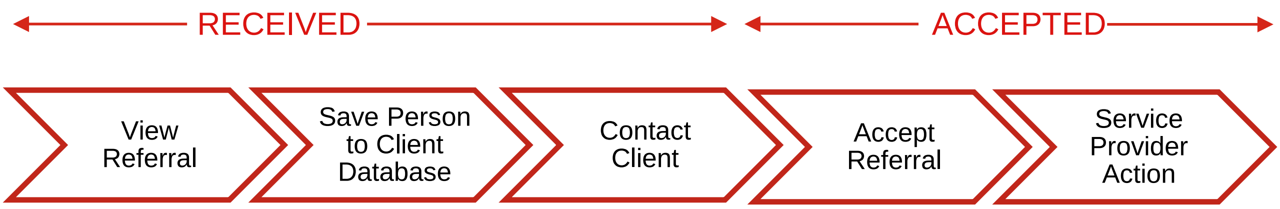


NOTE: If you have not created a new record, saved your work or navigated around SRS for more than one hour you will be automatically logged out.

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



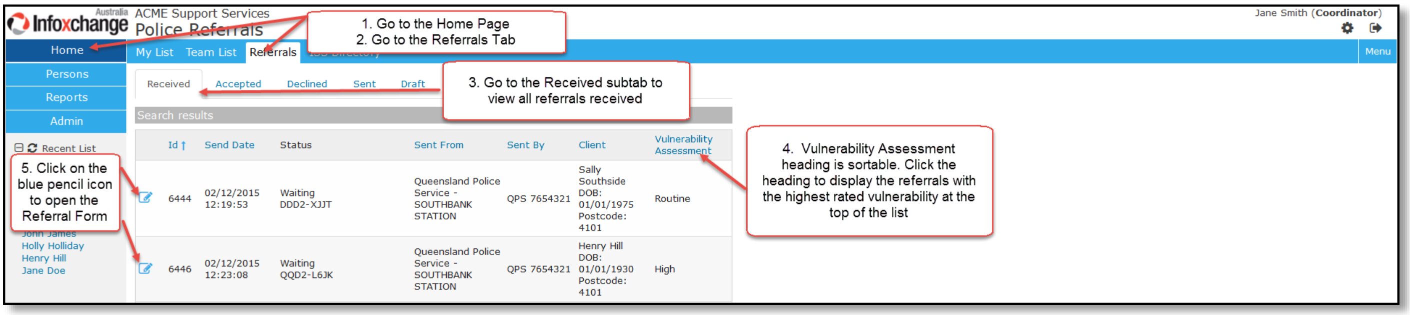
Once a Service Provider Action has been recorded for a QPS Referral, the referral is considered closed and the referring Police Officer will receive an automatic message advising of the referral's outcome.

4.1 Viewing Referrals

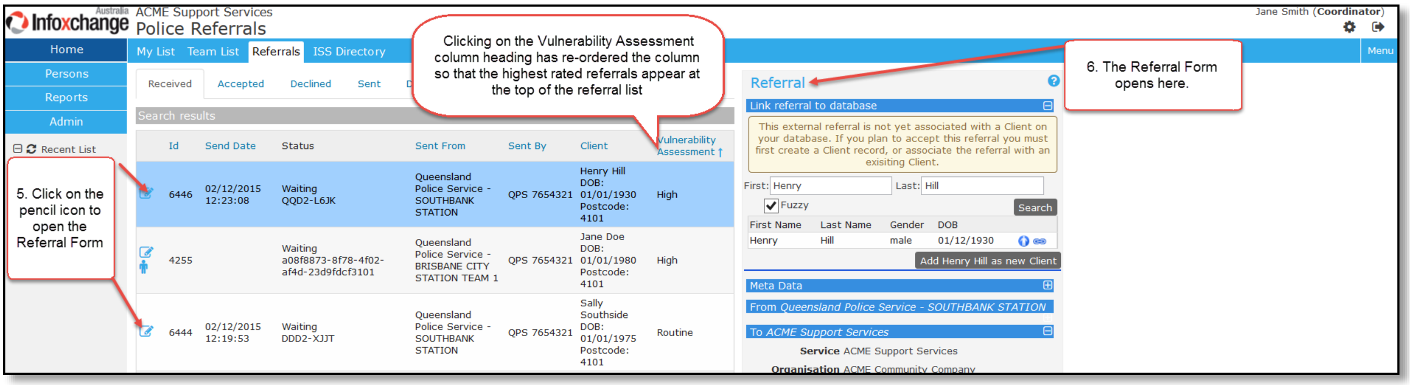
All Referrals received are available on the **Referrals** tab on the **Home** page. All received Referrals are listed on the first subtab **'Received**'.

Steps

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'.
4. 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.

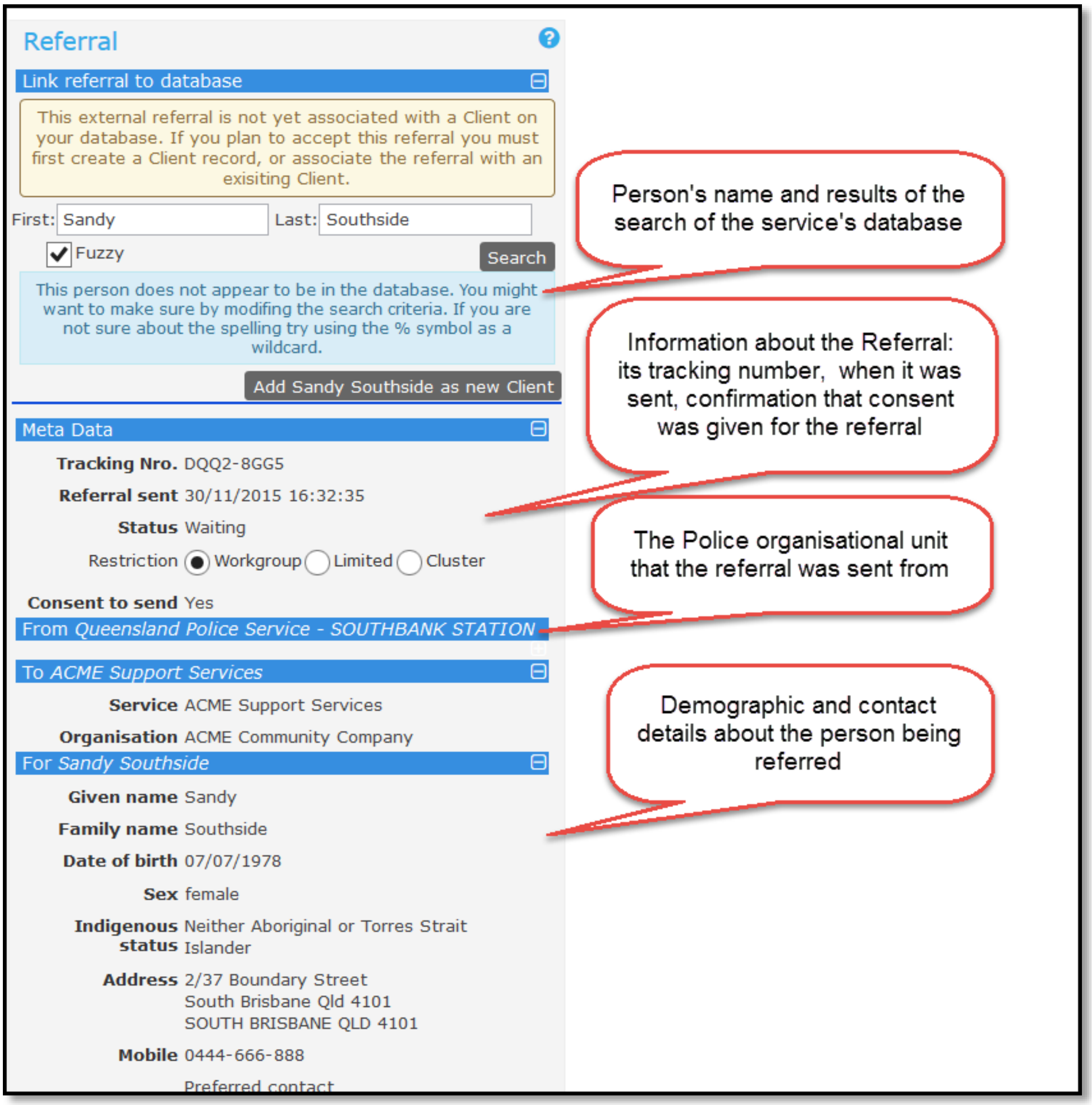


6. Read through the information on the Referral Form starting from the top. Information is displayed under a series of blue banners. To view information under a heading, click on the plus symbol .

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

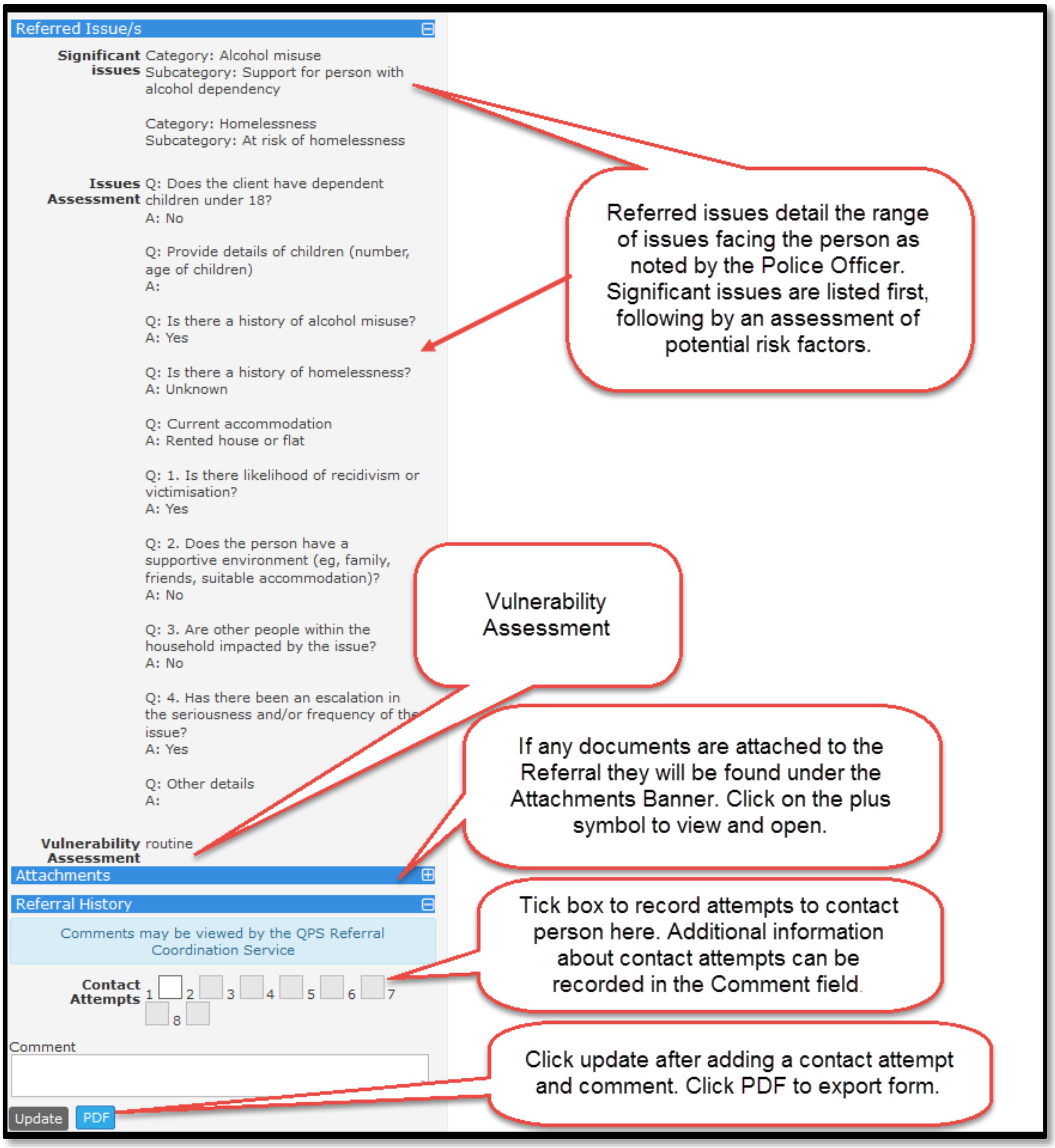
The Referral Form from the top to the Person's Details

Referral Form Part One



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

Referral Form Part Two



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.**

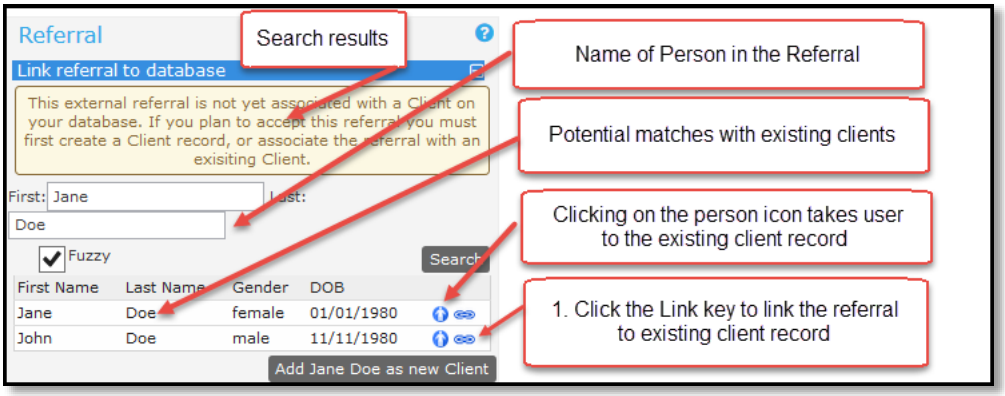
The search results will provide users with two options:

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:

Steps

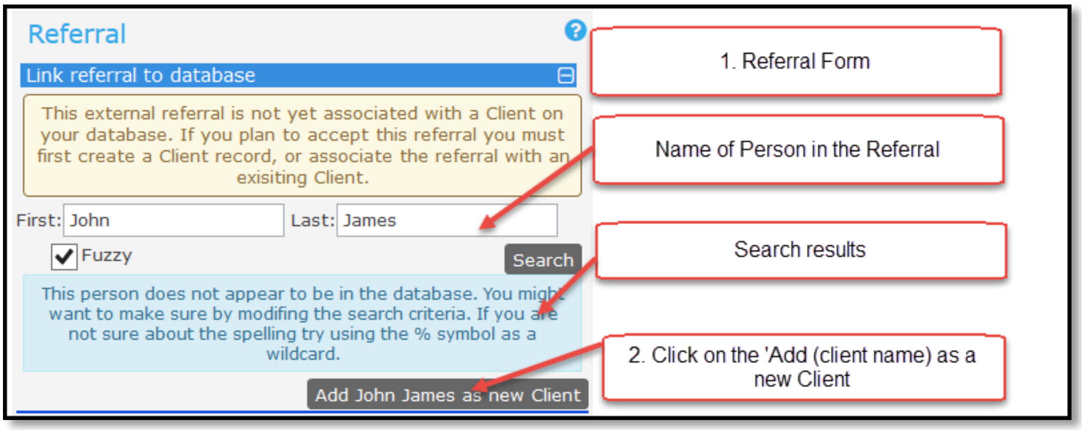
1. Go to the top of the **Referral Form,** under the blue banner **'Link referral to database'.**
2. Consider the list of potential matches. If a match is found, click on the link icon to link the referral to an existing client.
3. If users want to check the record of the existing person on the database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



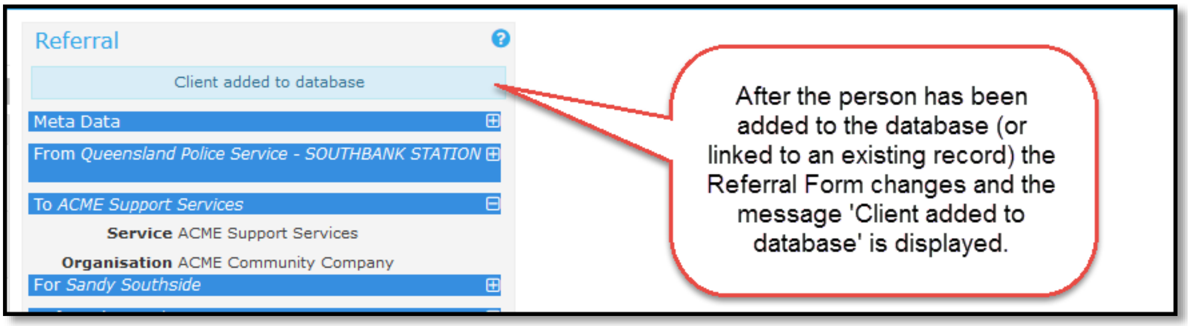
To add the person as a new client.

Steps

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.



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

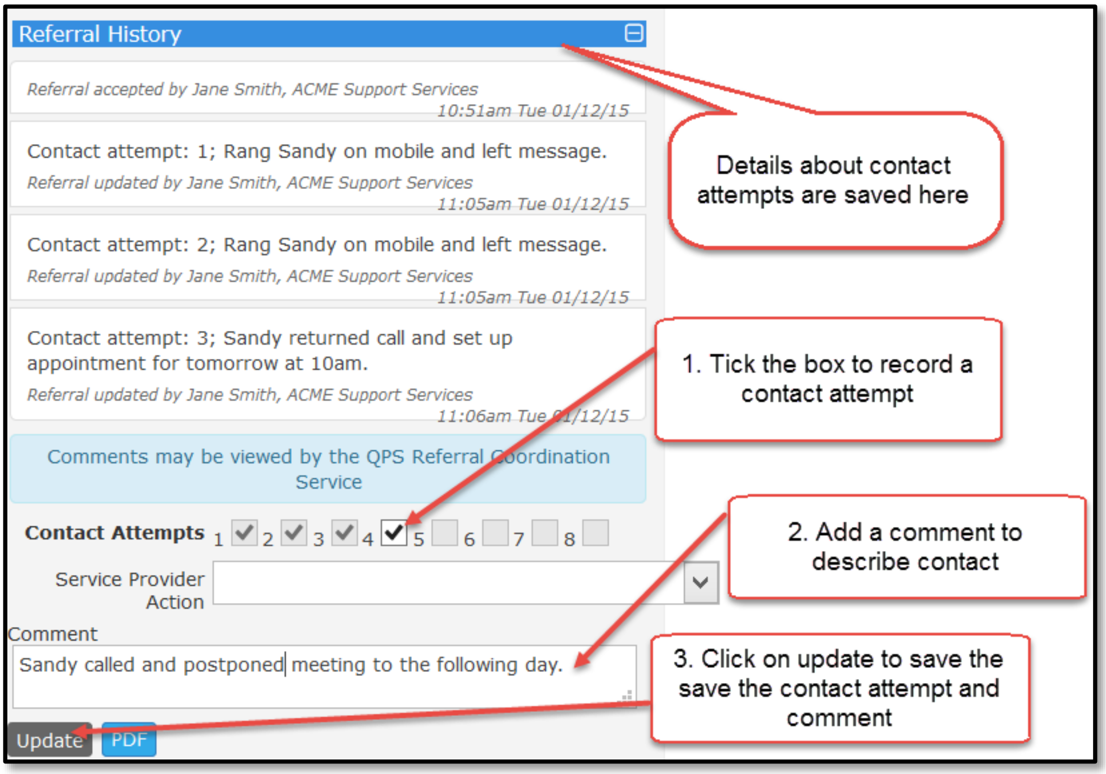


4.3 Contacting the Person

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.
3. 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.

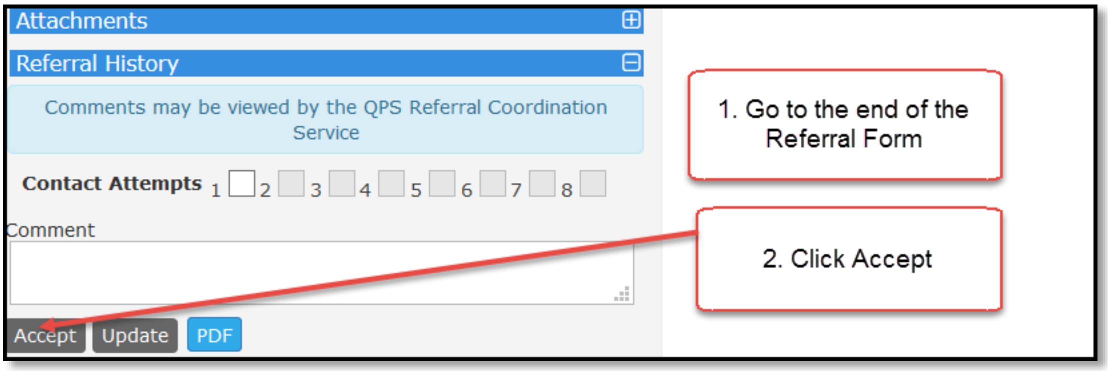


4.4 Accepting the Referral

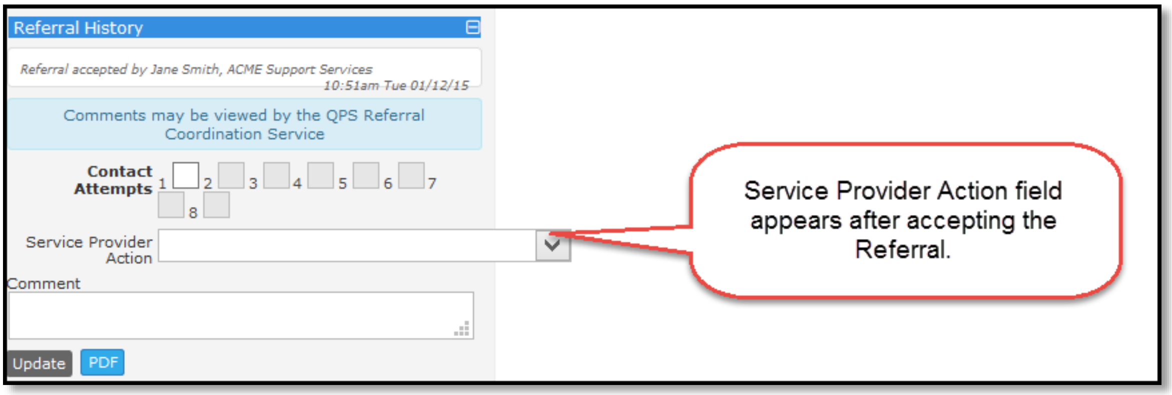
After adding the person to the client database, an Accept button displays at the bottom of the Referral Form.

Steps

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.

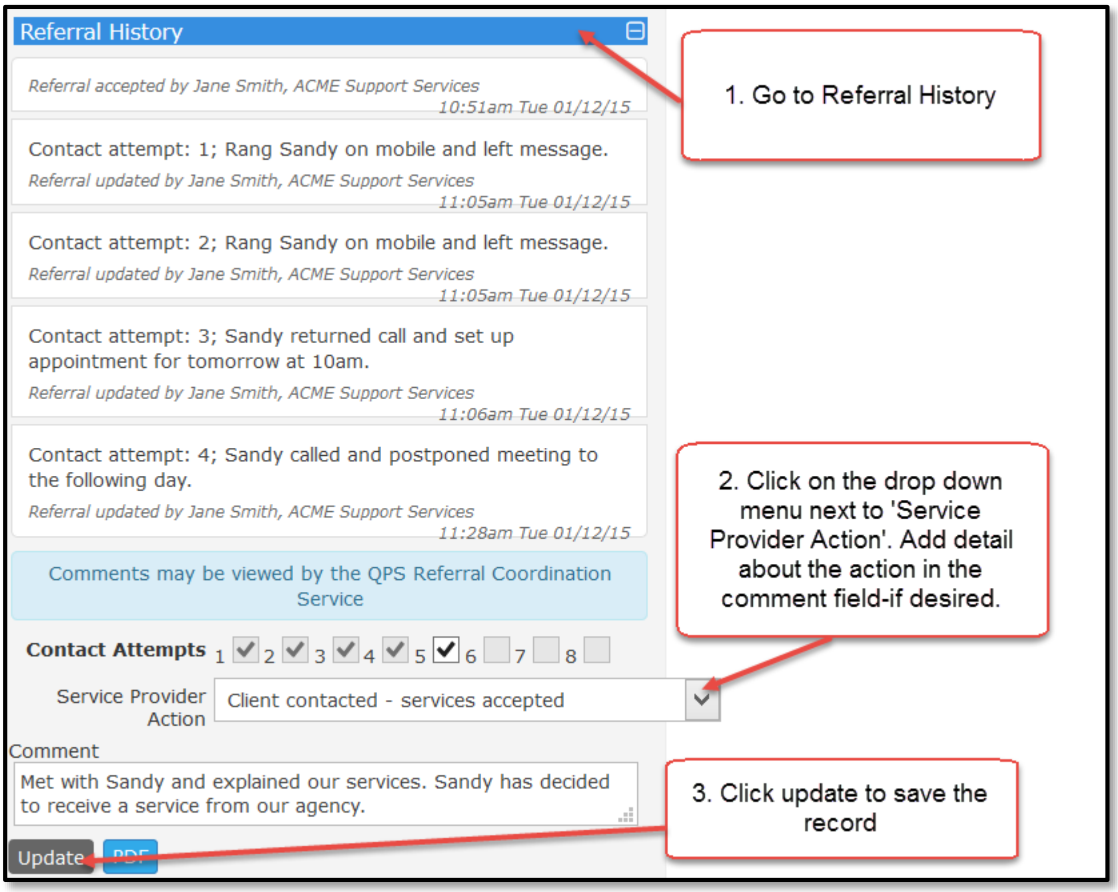


4.5 Recording Service Provider Action

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.

Steps

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**.



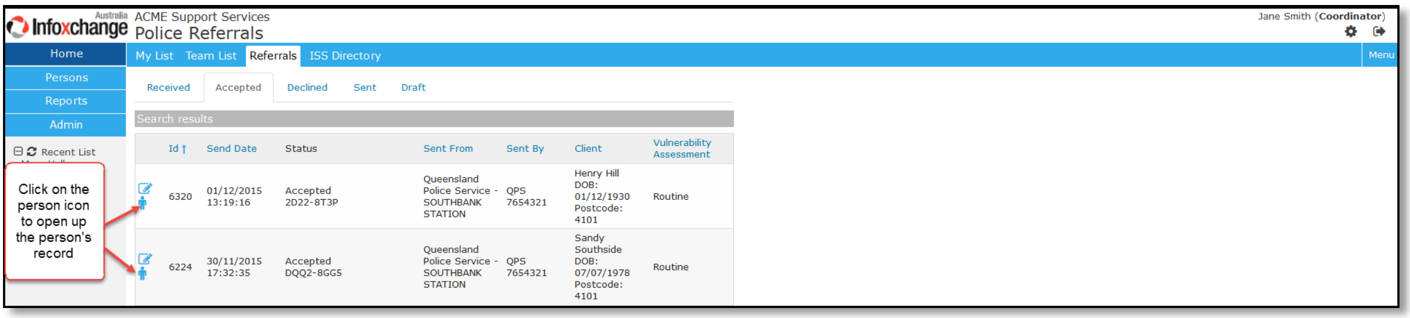
5 View the person's record

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

Steps

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 icon. The Person's record will open on the **Details Tab** on the **Persons Page.**



5.2 Using Search to view a Person Record

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

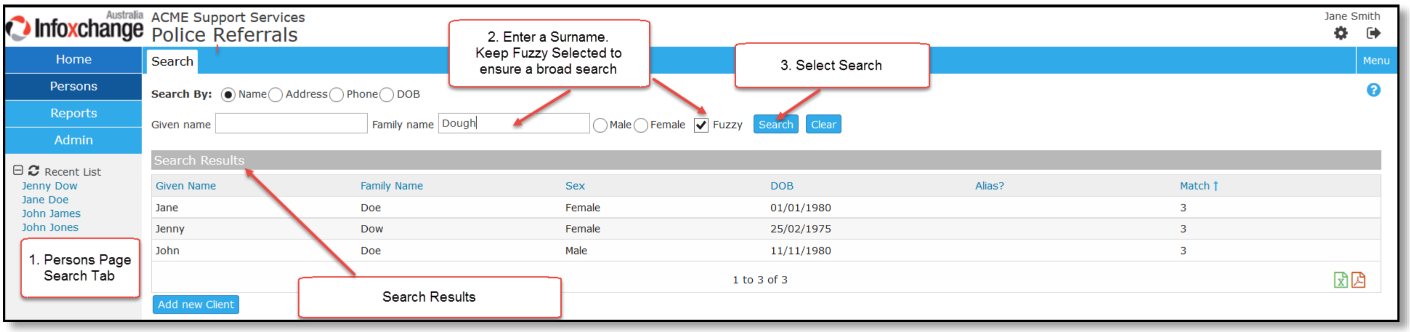
To perform a search, enter your search criteria details and click GO.

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.

Steps

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.



5.3 Accessing a Person Record via the Recent List

Steps

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.

6 Adding information to a Person's Details

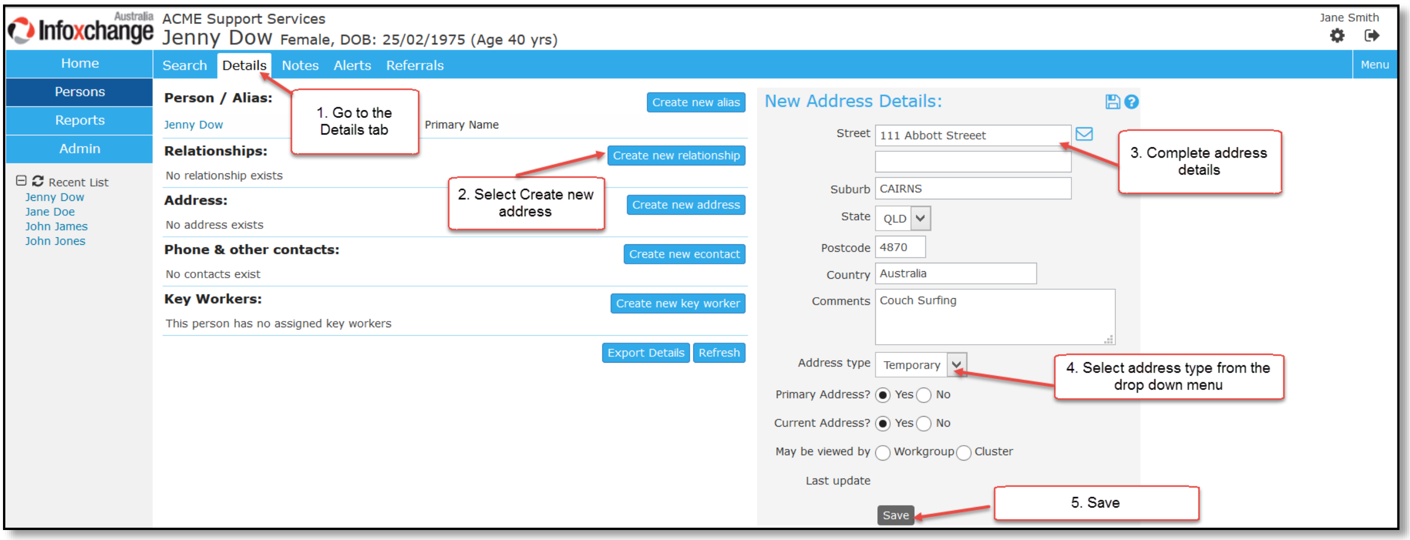
The Referral from Queensland Police will contain demographic and contact details that will automatically be copied into a person's record when saved to the client database. Users can update the demographic and contact details on a Person's record.

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.

Steps

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.**

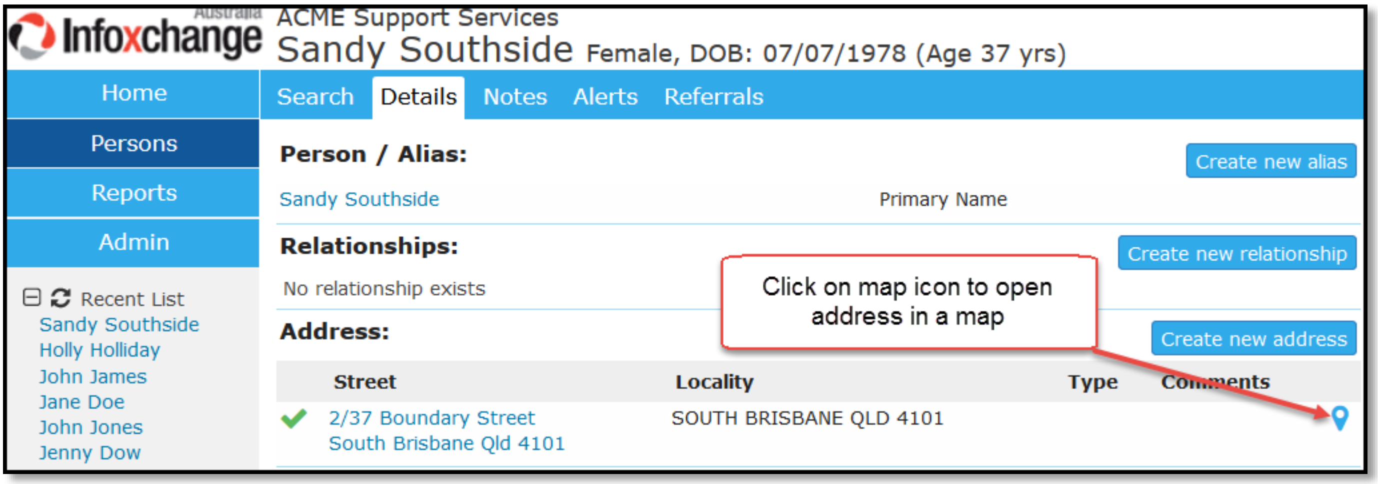


View address on a Map

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.

Steps

1. Click on map icon to open Map.

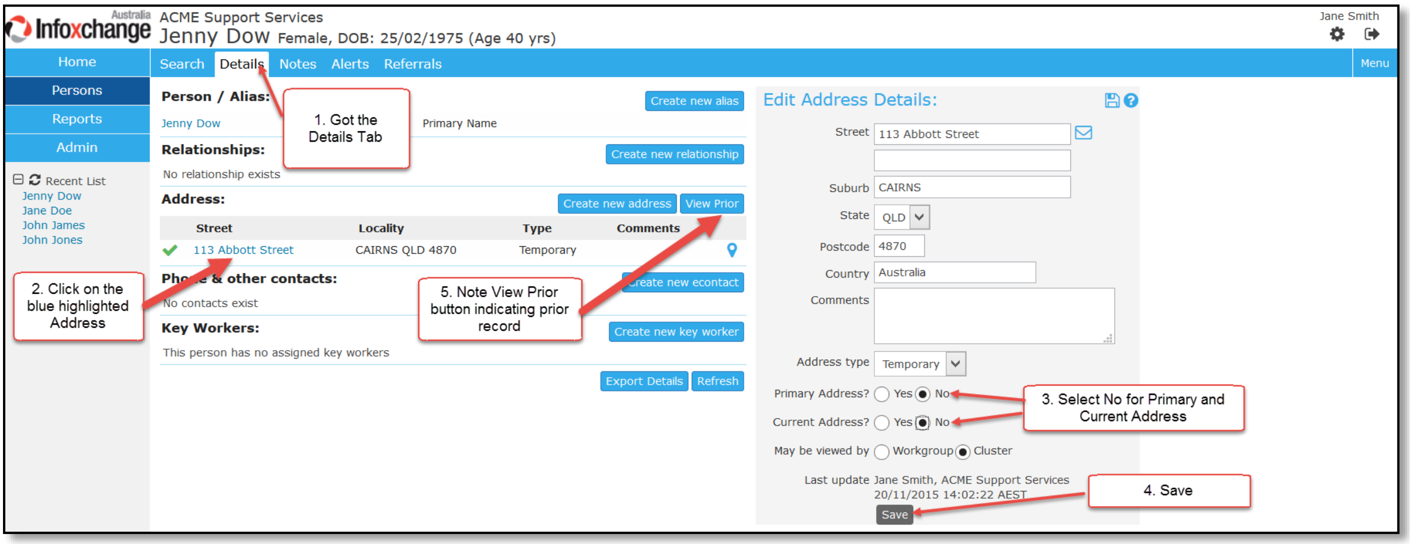


Update Address details

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.

Steps

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.**



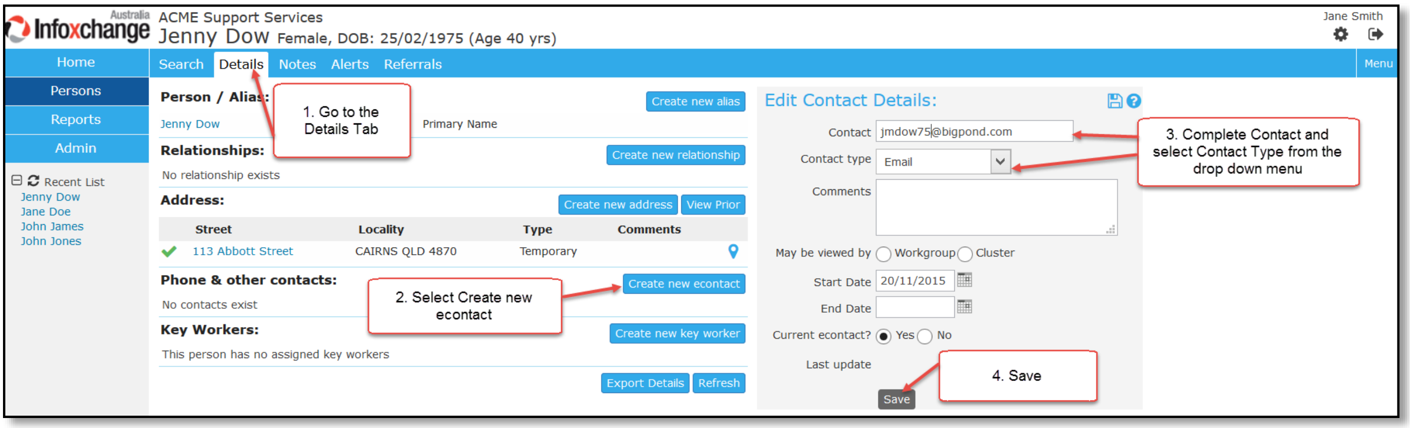
6.2 Create eContact

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.**

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

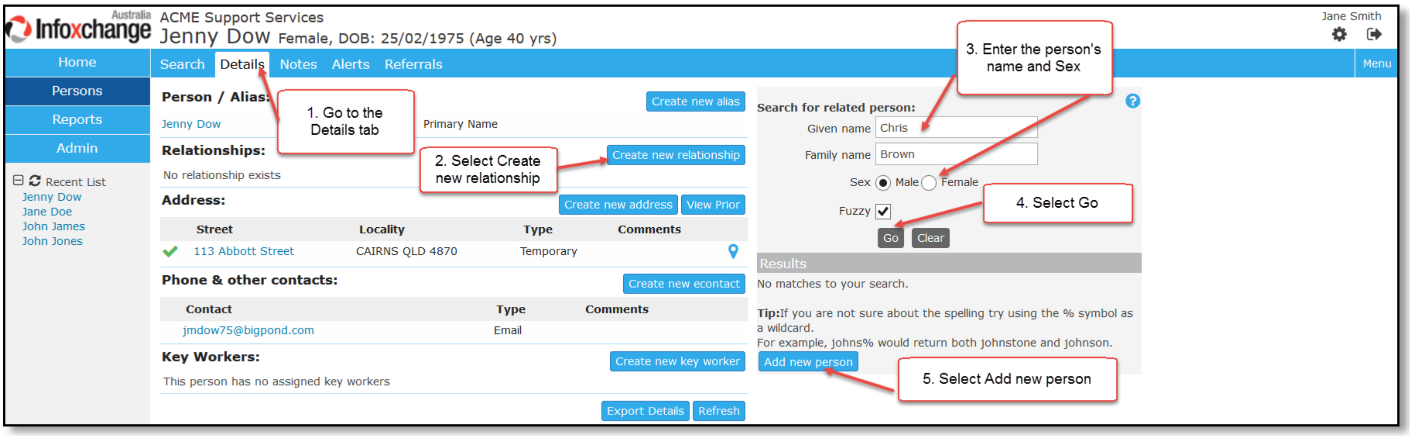


6.3 Add Relationship

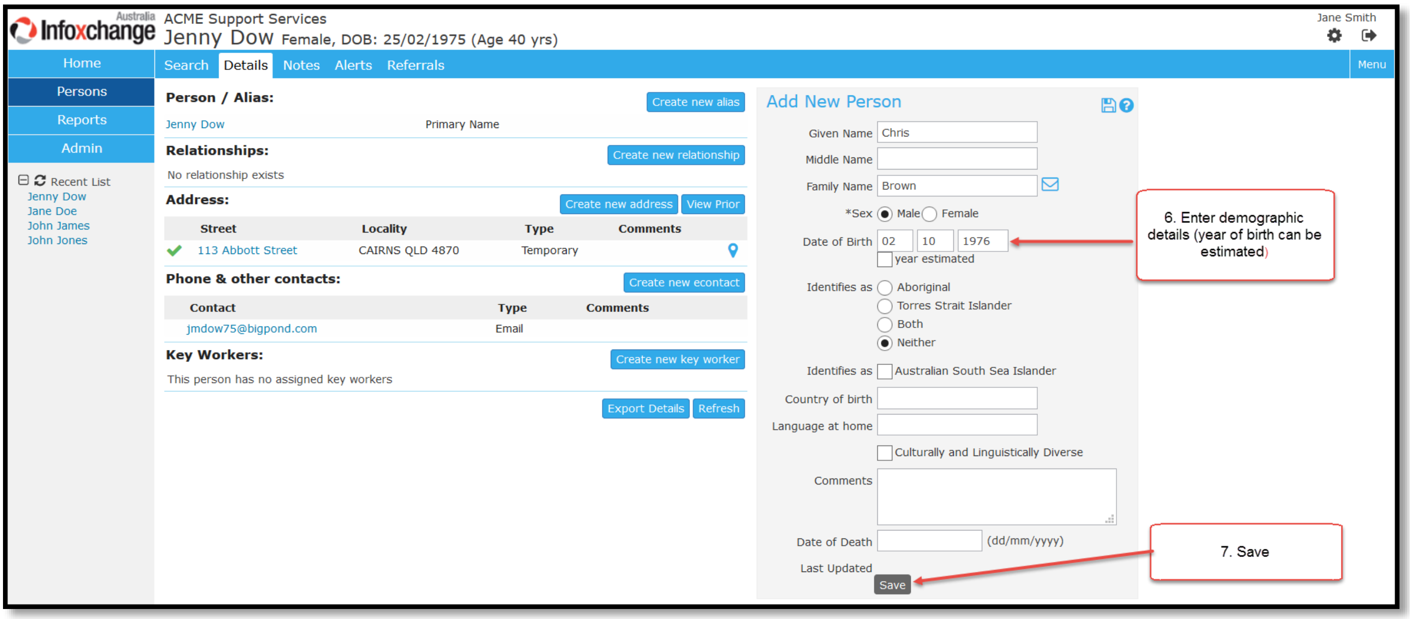
Users are able to add people related to a client in the person's record. SRS will search the database for any matches to people already on the database prior to adding. Creating a new relationship takes users through three screens as demonstrated below.

Steps

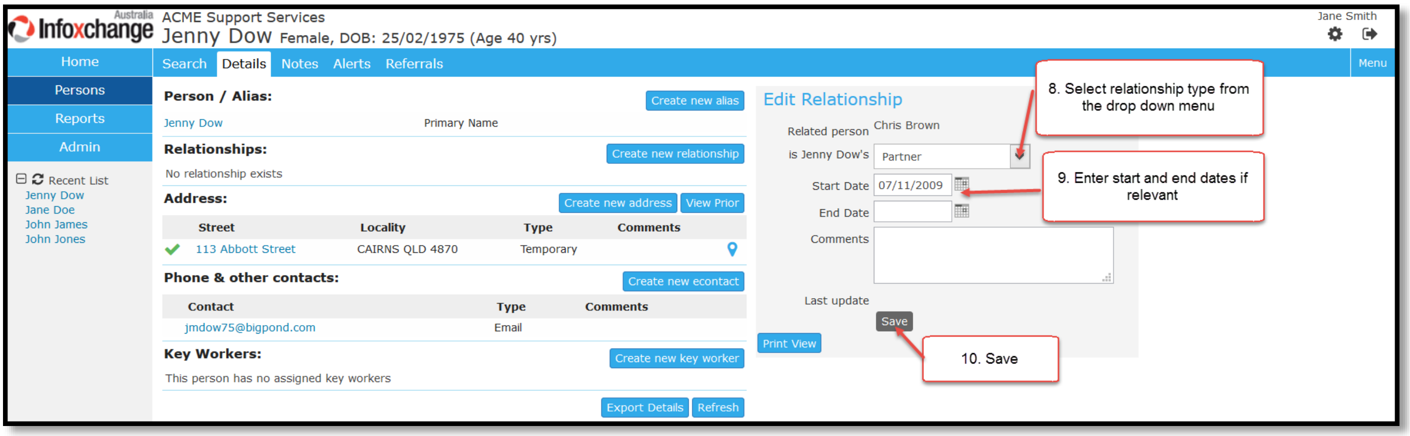
1. Go to the **Details tab.**
2. Select **Create new relationship.**
3. Enter **person's name** into the form.
4. Select **Go.**
5. If no matches select **add new person** OR select the **existing person.**



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



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

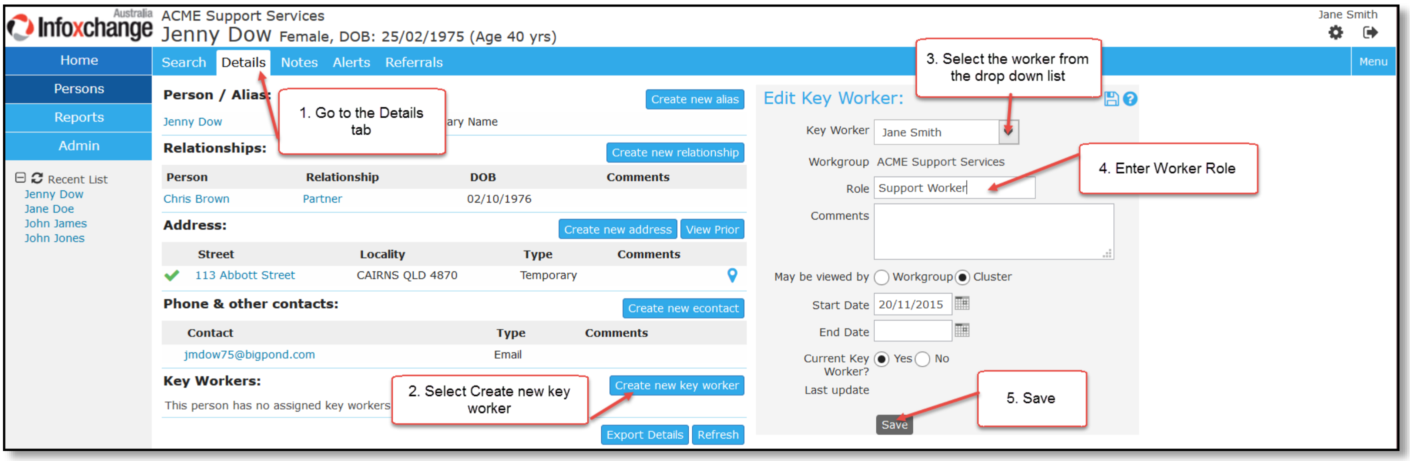


6.4 Add Key Worker

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

<u>**Steps**</u>

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

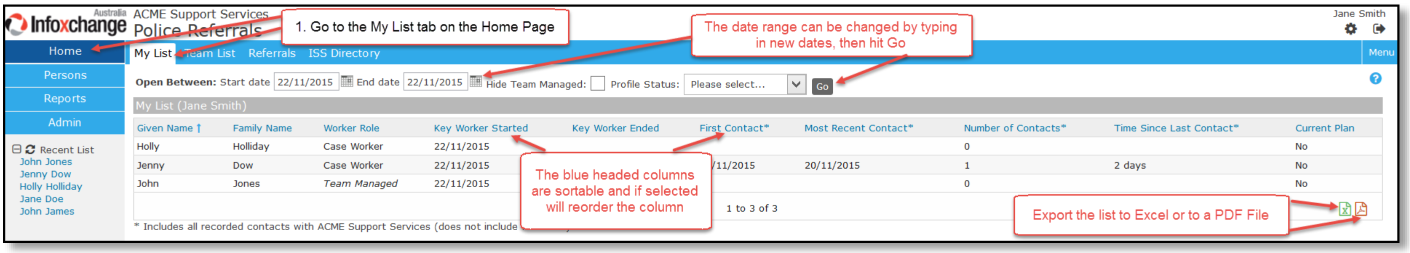


After adding a Key Worker to client records:

- 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.

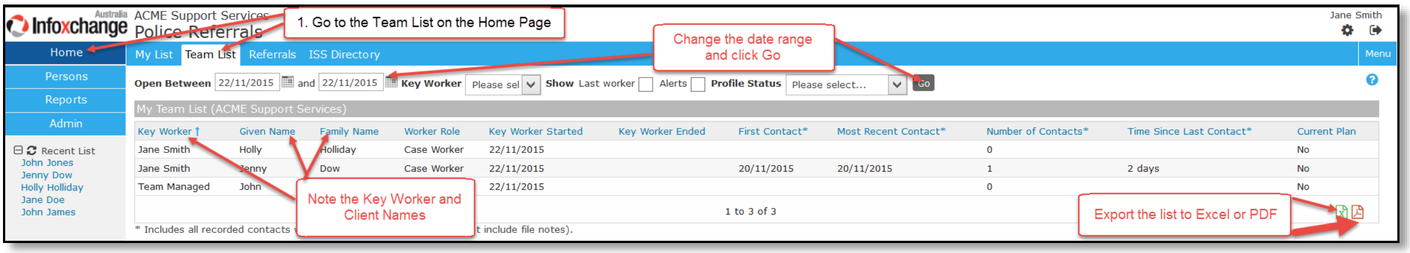
To view a list of all clients assigned to a user:

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.



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.

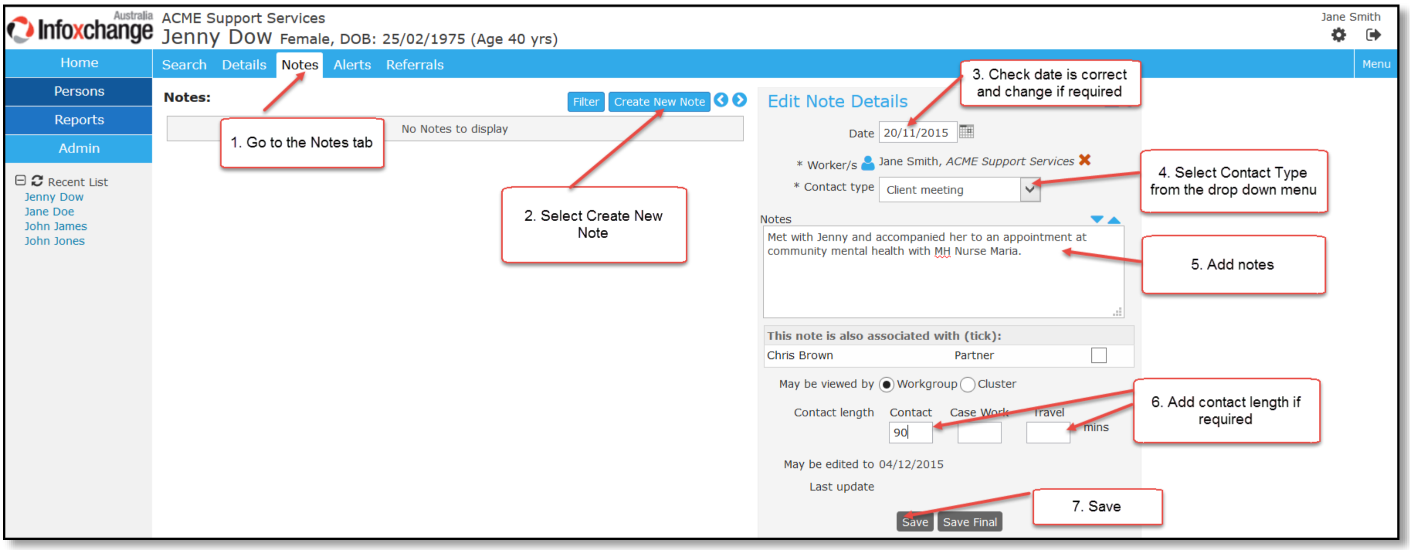


7 Creating Notes

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.

Steps

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.
6. 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.**



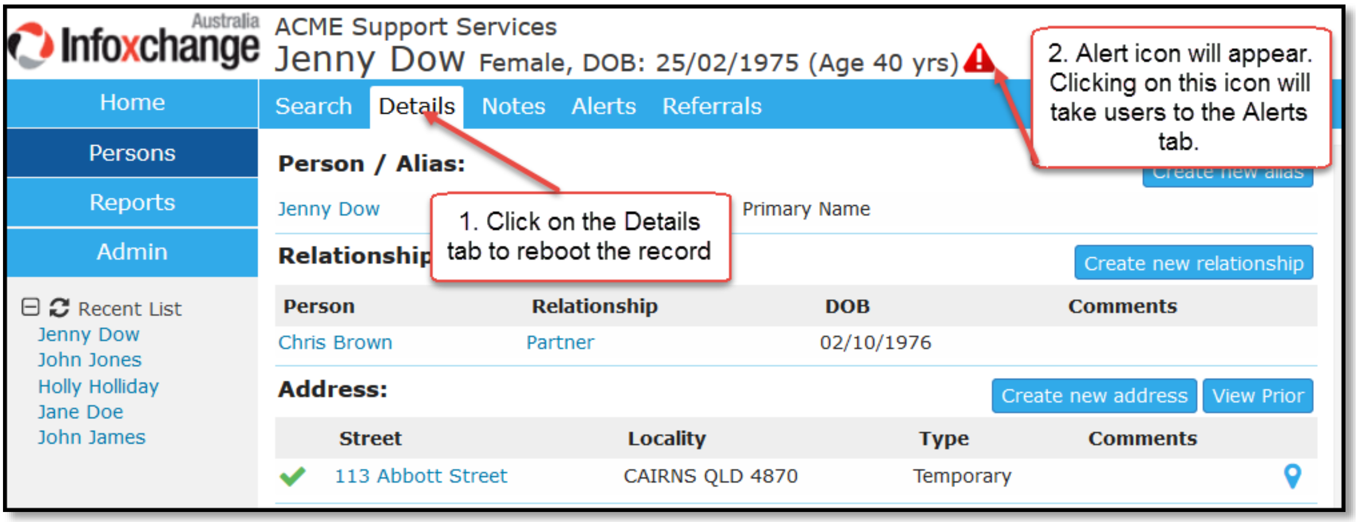
8 Create an Alert

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.

Steps

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**.

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



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.

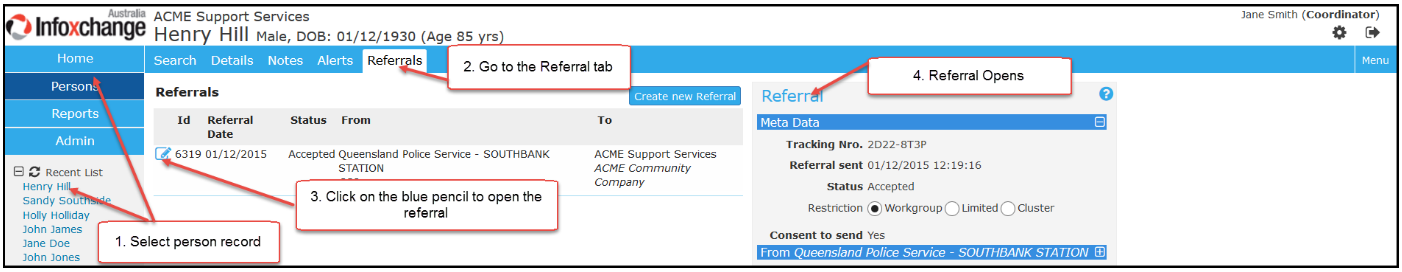
Services using other SRS/SHIP databases will only be able to electronically refer to services in their own referral networks (if any).

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.

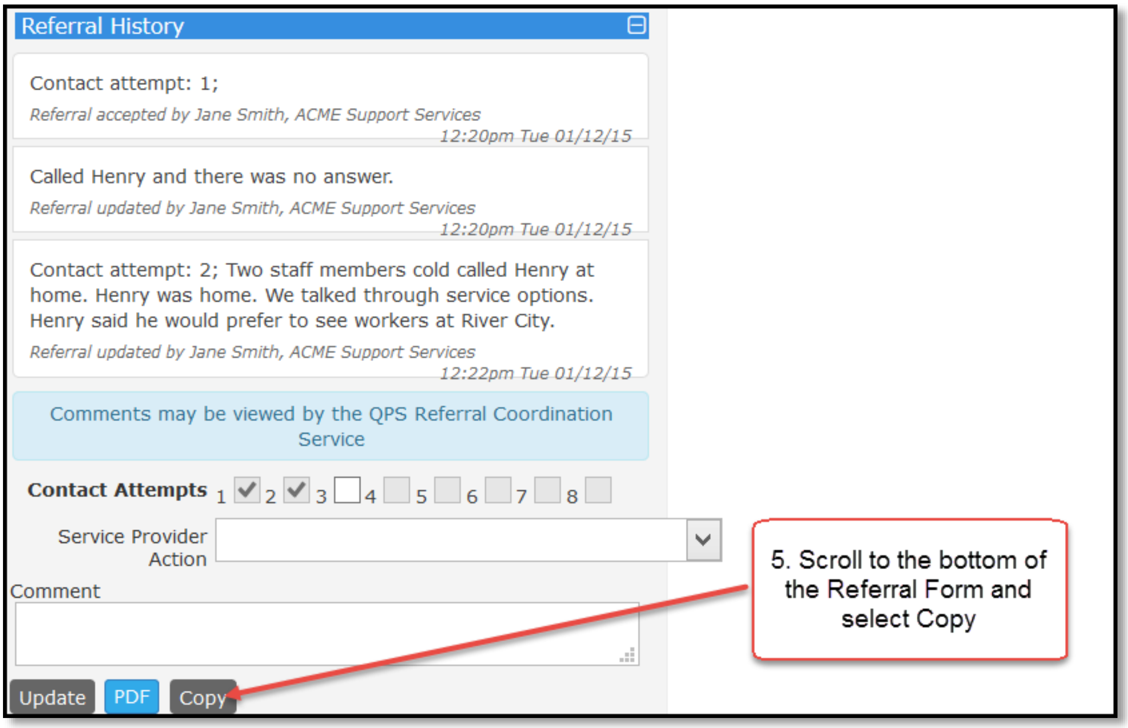
9.1 Sending a QPS Referral to another agency - electronically

<u>Steps</u>

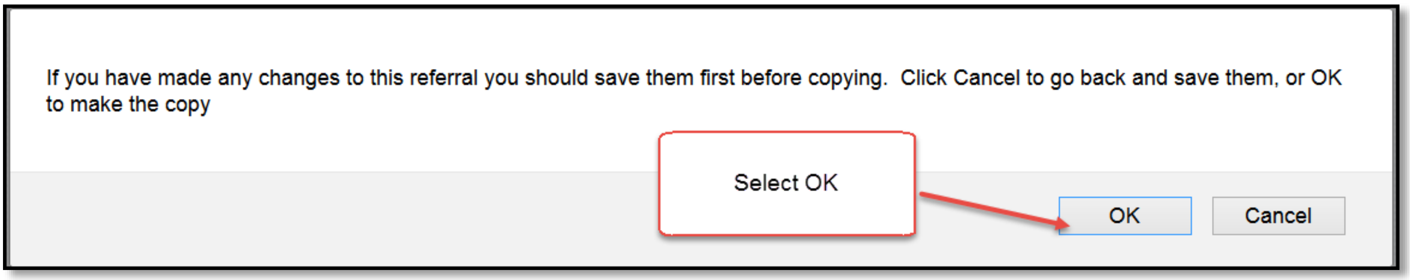
1. Go to **Client Record** from the **Recent List** or using **Search** on the **Persons Page.**
2. Go to the **Referral tab.**
3. Select the referral to forward from the list by clicking on the paper and pen icon
4. The **Referral Form** will open.



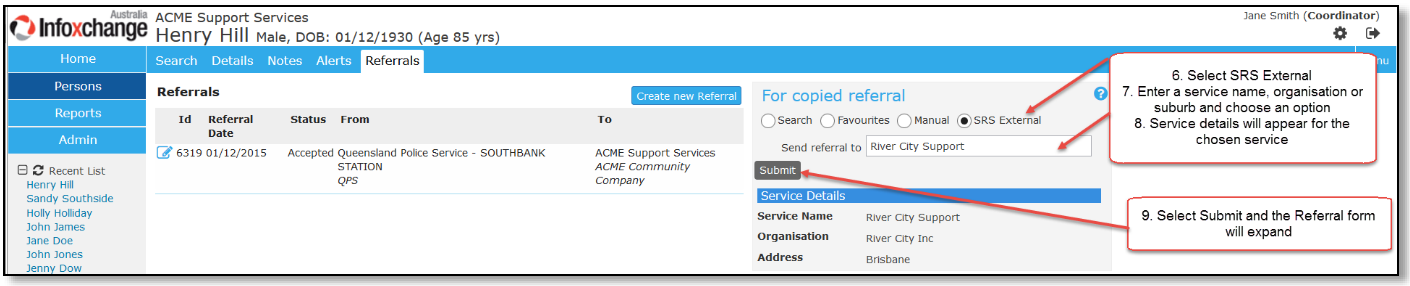
5 Scroll to the bottom of the form and select Copy.



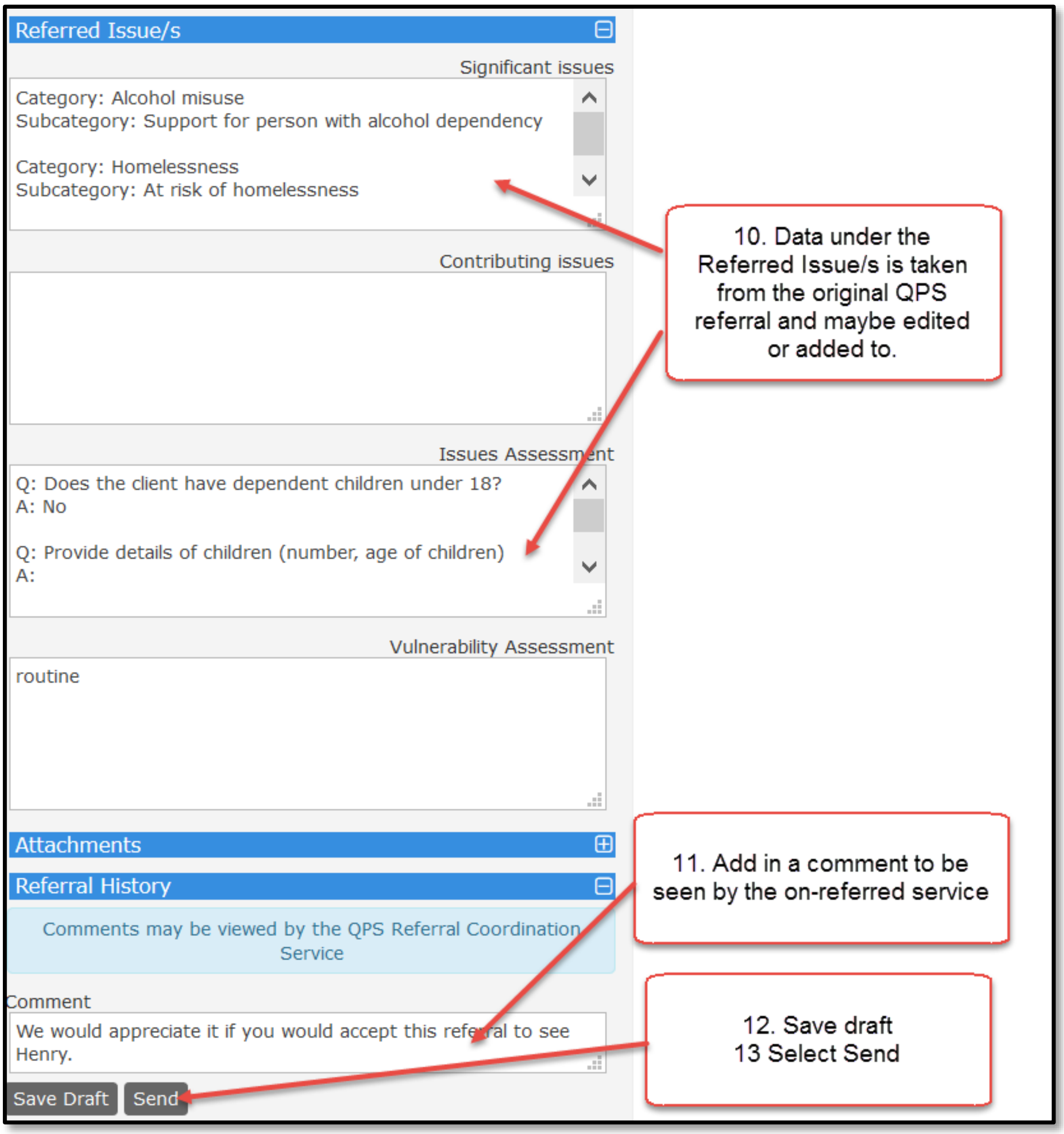
A message will appear confirming that you want to copy the referral.



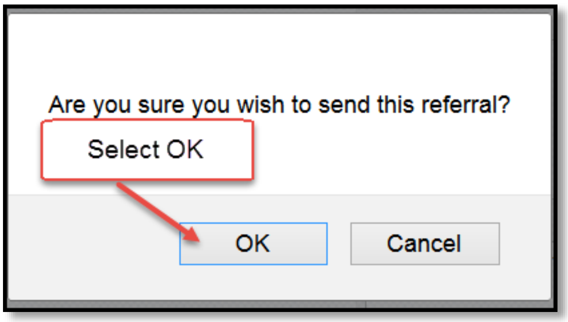
5. A new form appears with the heading 'For copied referral' select SRS External.
6. Enter the service, organisation or Suburb in the Send Referral to field. Users are searching for services within the Police Referrals network or their own referral networks. (see start of Chapter 9 of the guide for any 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.



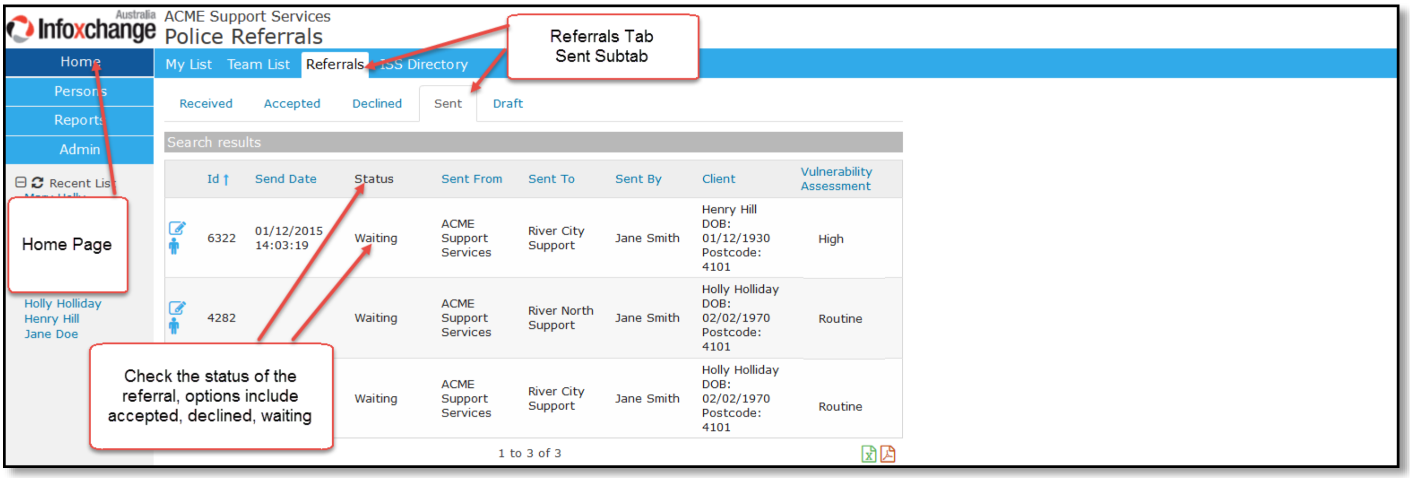
9. Data under the Referred Issue/s banner is taken from the original QPS Referral and can be amended or added to.
10. Go to Referral History at the end of the form and add in a Comment which will be seen by the service receiving this referral.
11. Save Draft.
12. Select **Send.** This will send the referral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



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



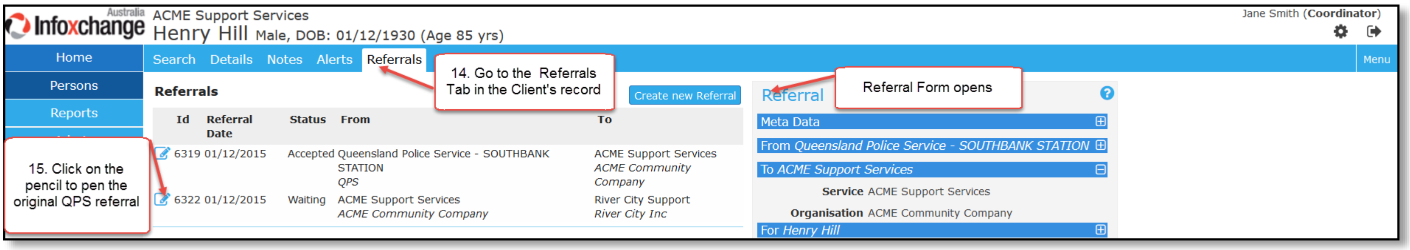
Users will monitor the status of the referral by going to the **Referrals Tab** on the **Home Page.**



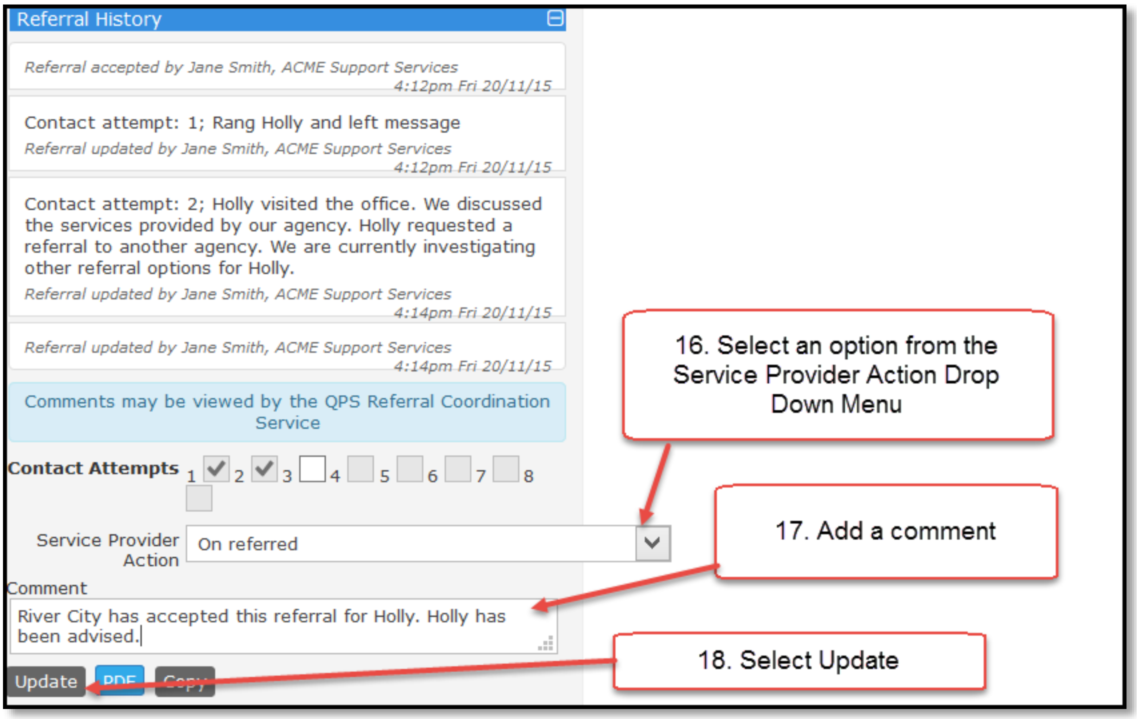
Updating the Original QPS Referral with Service Provider Action

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.



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**.**



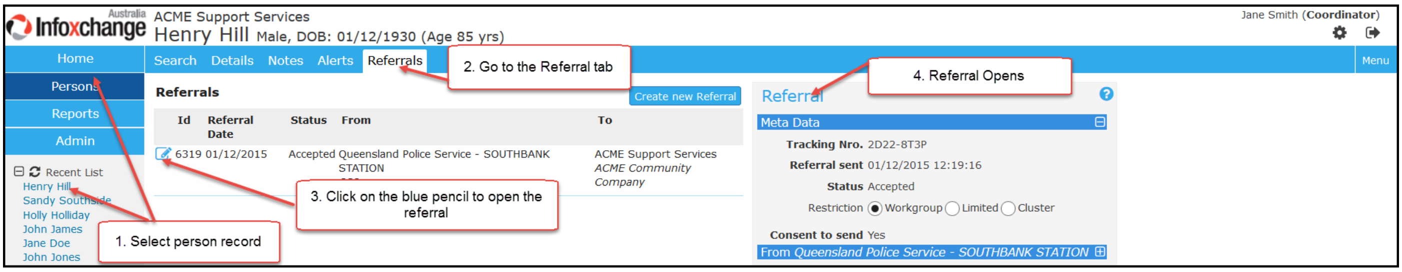
9.2 Sending a QPS Referral to another service - manually

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.

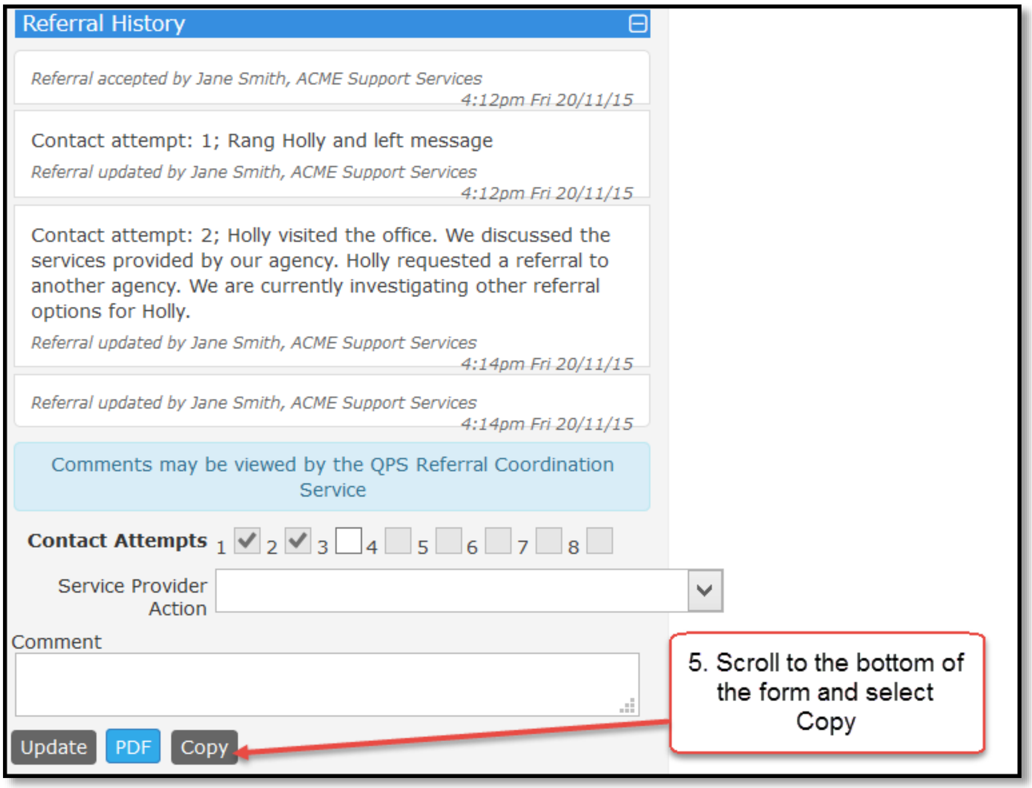
To copy the QPS Referral users undertake the following steps:

Steps

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.



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



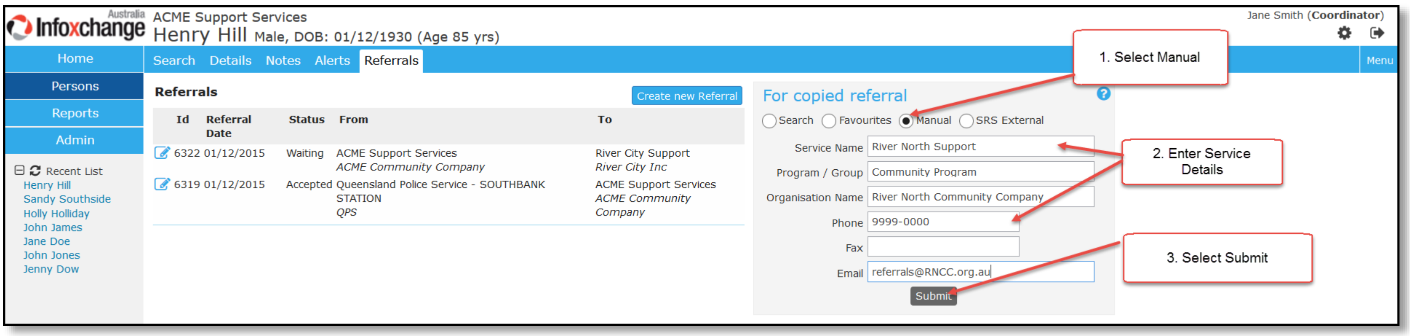
A new form headed ‘For copied referral’. Users have two methods of inputting the details of the service that the referral will be sent to:

- 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.

Steps

To **manually** enter the service details:

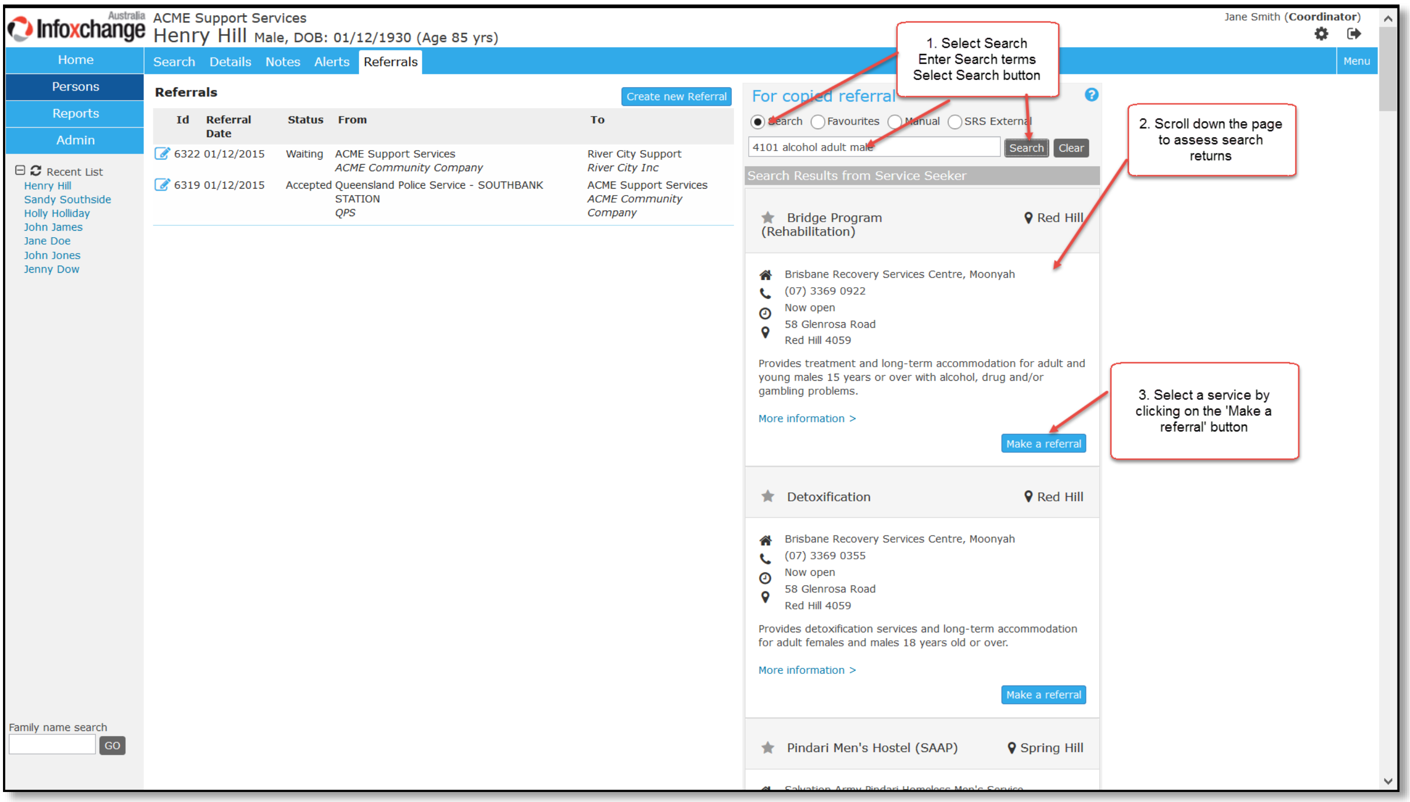
1. Select the **Manual** button.
2. Enter the **Service Name** and contact details.
3. Select **Submit** and the **Referral Form** will expand pre-populated with the information from the original **QPS Referral.**



Steps

To use **Infoxchange Service Seeker** to locate a service:

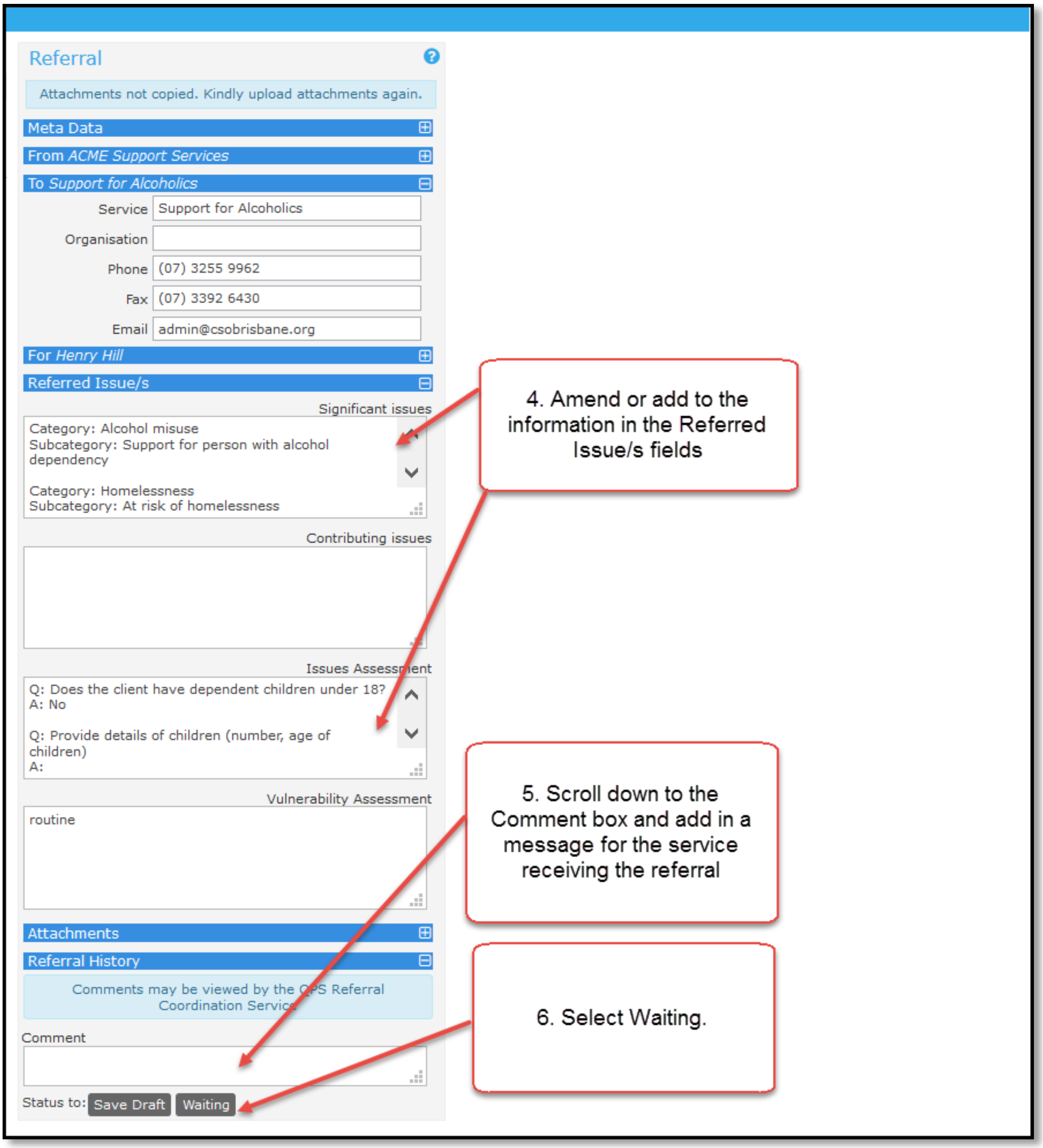
1. Select Search and enter search terms. Select Search button.
2. Scroll down the page to assess the search returns.
3. Select a service by selecting ‘make a referral’ button.



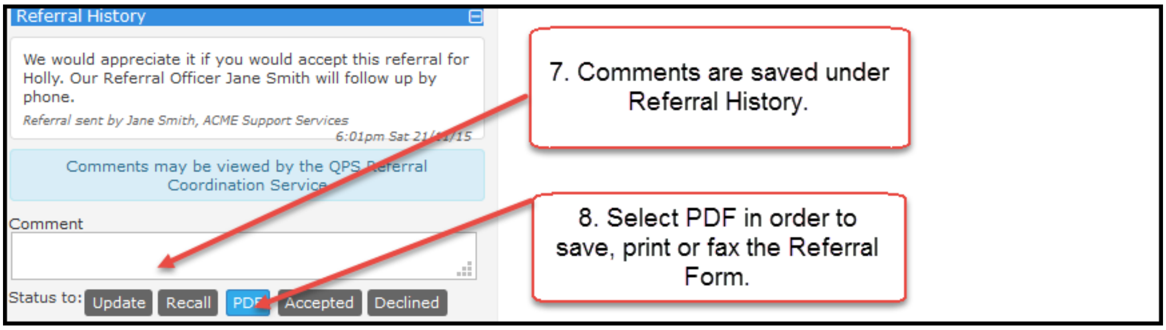
After users either input the service details or select the service via Service Seeker, the steps to complete the referral are the same, as detailed below:

Steps

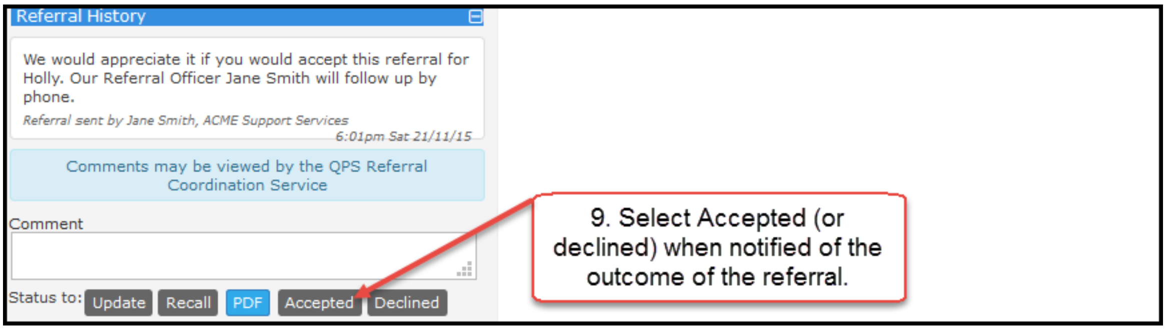
4. Amend or add to the information in the **Referred Issue/s** fields.
5. Scroll down to the **Comment** box and add in a message that will be seen by the service receiving the referral.
6. Select **Waiting.**



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.



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



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

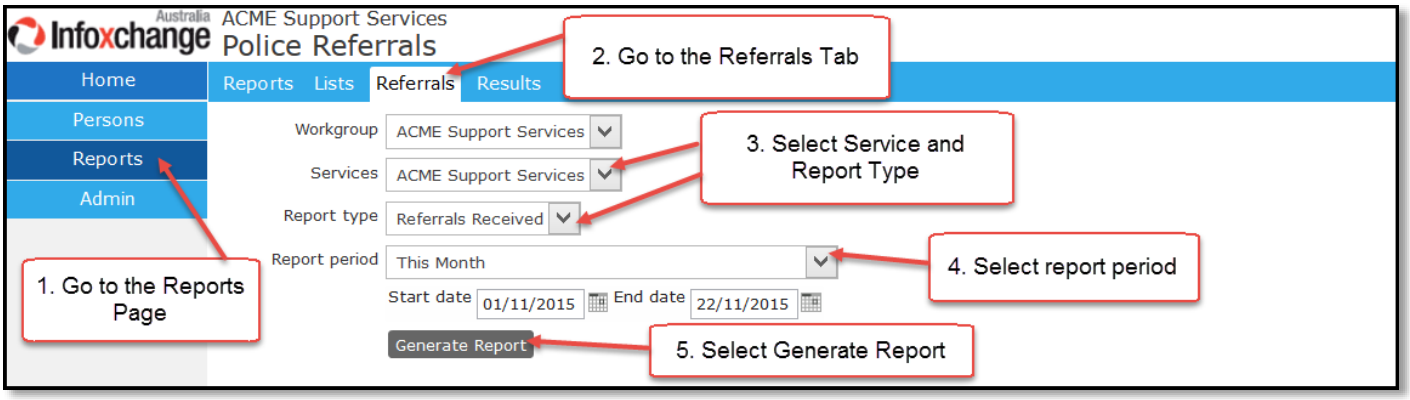
Users are able to generate both reports and lists from the **Reports Page** within SRS Queensland Connect. Reports are aggregated data, for example, total number of males and females. Whereas lists generate unit level data and in this example would list each male and each female.

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

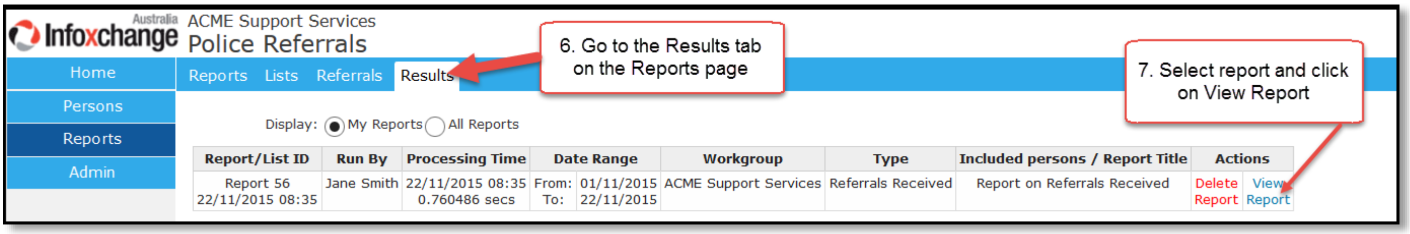
Steps

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'.**

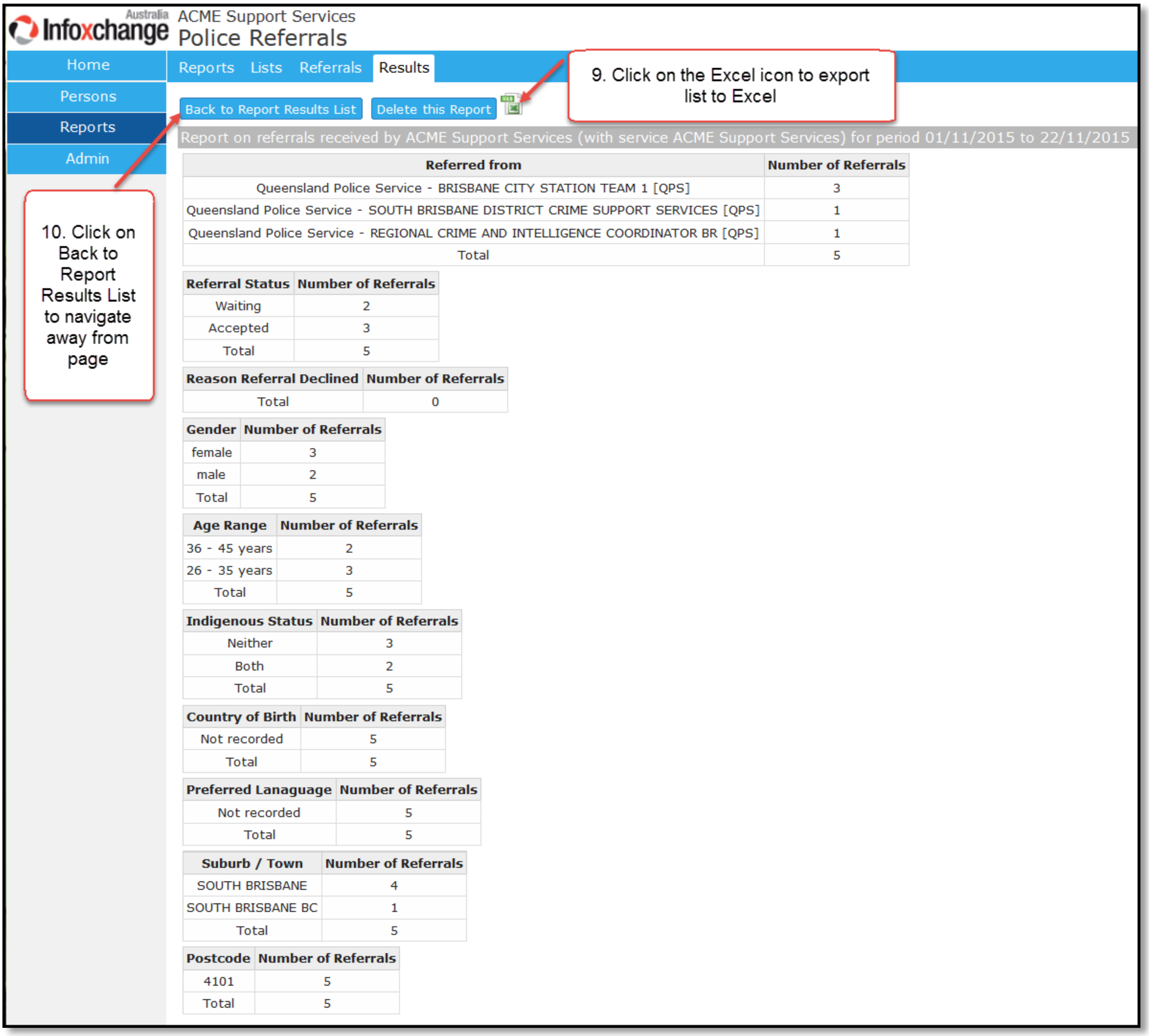


The Referral Report is generated and is available to view on the Results tab.

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'.**



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**.



Referred from	Number of Referrals
Queensland Police Service - BRISBANE CITY STATION TEAM 1 [QPS]	3
Queensland Police Service - SOUTH BRISBANE DISTRICT CRIME SUPPORT SERVICES [QPS]	1
Queensland Police Service - REGIONAL CRIME AND INTELLIGENCE COORDINATOR BR [QPS]	1
Total	5

Referral Status	Number of Referrals
Waiting	2
Accepted	3
Total	5

Reason Referral Declined	Number of Referrals
Total	0

Gender	Number of Referrals
female	3
male	2
Total	5

Age Range	Number of Referrals
36 - 45 years	2
26 - 35 years	3
Total	5

Indigenous Status	Number of Referrals
Neither	3
Both	2
Total	5

Country of Birth	Number of Referrals
Not recorded	5
Total	5

Preferred Lanaguage	Number of Referrals
Not recorded	5
Total	5

Suburb / Town	Number of Referrals
SOUTH BRISBANE	4
SOUTH BRISBANE BC	1
Total	5

Postcode	Number of Referrals
4101	5
Total	5

11 User Preferences

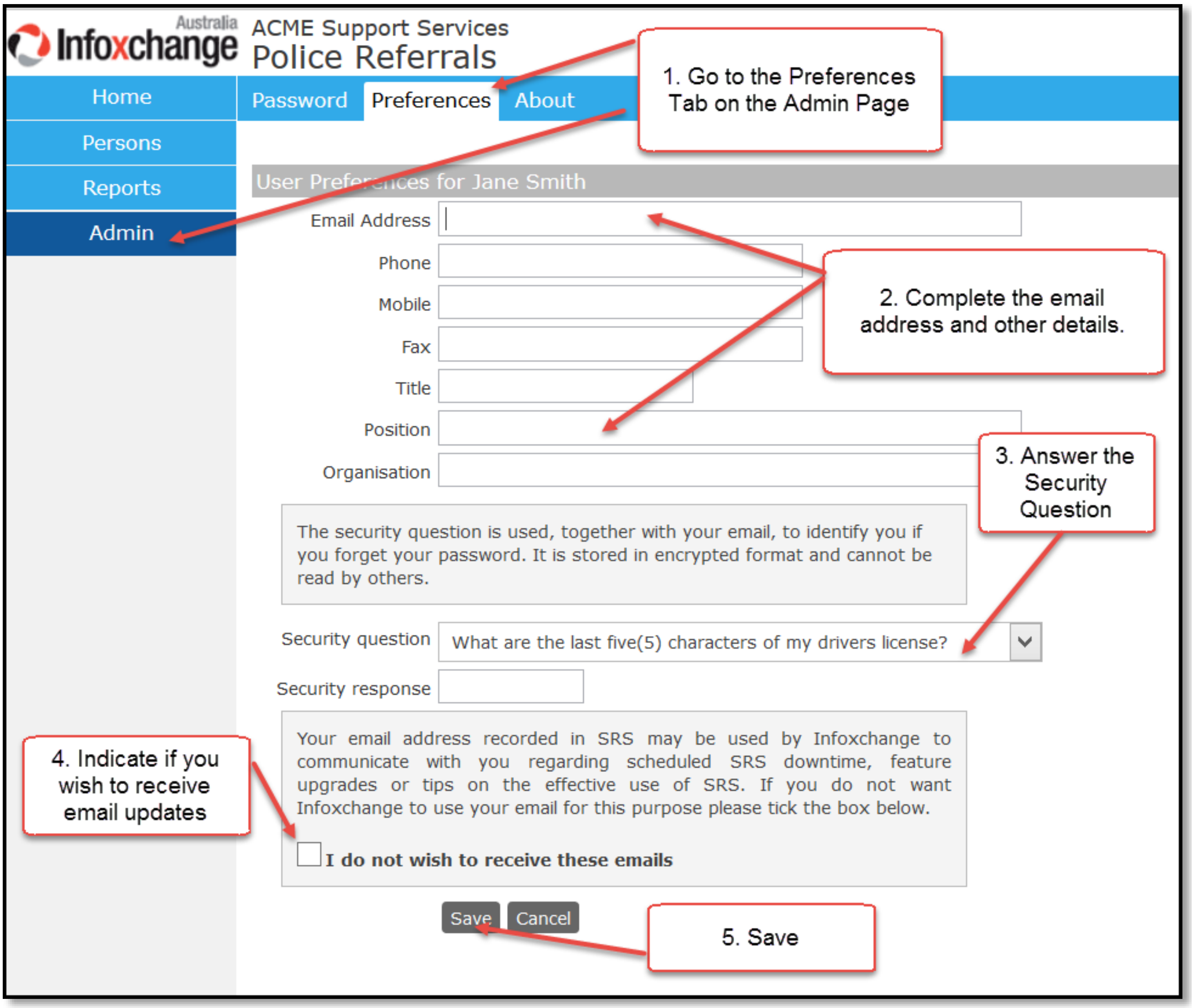
All users are able to complete their details in the **Preferences tab** on the **Admin Page** and change their **passwords.**

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.

Steps

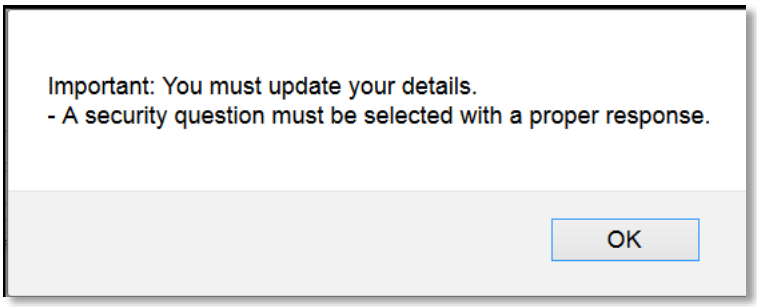
1. Go to the **Preferences Tab** on the **Admin Page**.
2. Complete the **Email address**, and other details.
3. Answer the **Security question.**

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



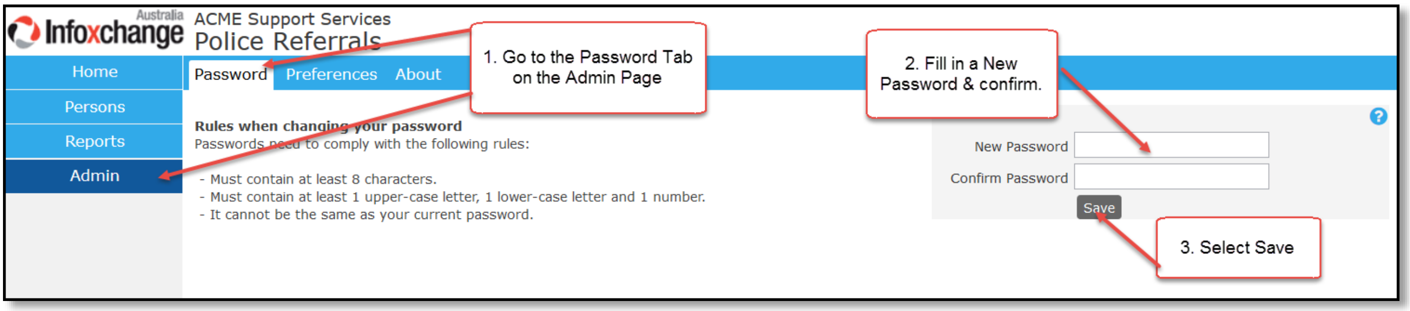
11.1 Change password

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



Steps

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**

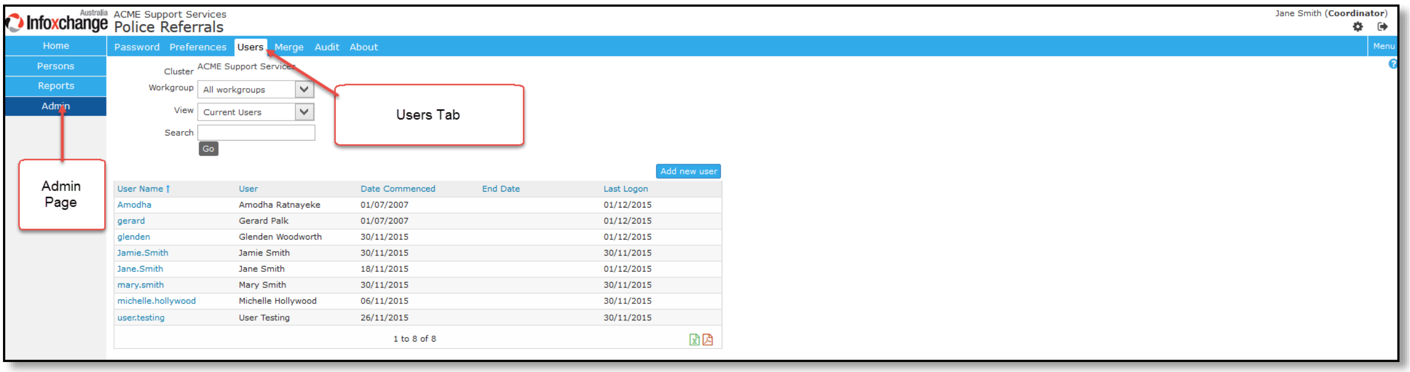


11.2 User Administration-Coordinator Functions

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.



11.3 Creating a New User

The process of creating a new user involves three steps:

Creating the new **User Name**.

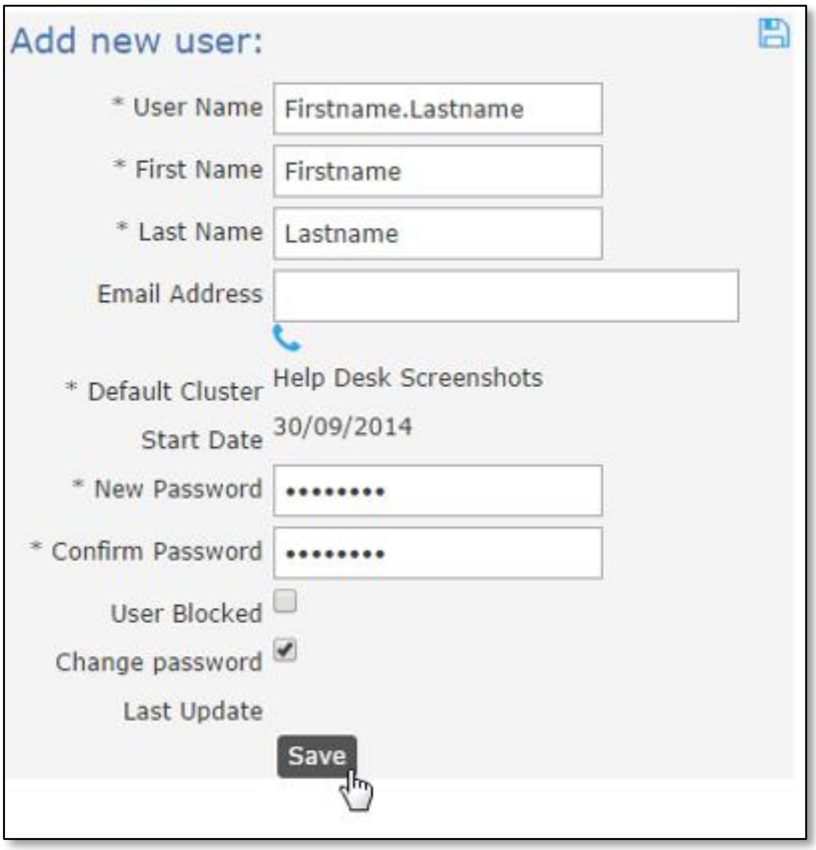
Allocating the new **User Name** to a workgroup. Failure to allocate the **User Name** to a workgroup will result in the user not being able to access the required functions and records within the application.

Allocating the correct access level.

To create a new User:

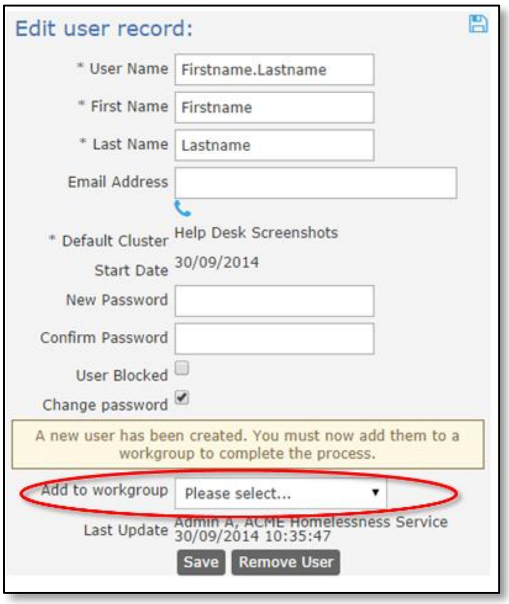
Steps

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

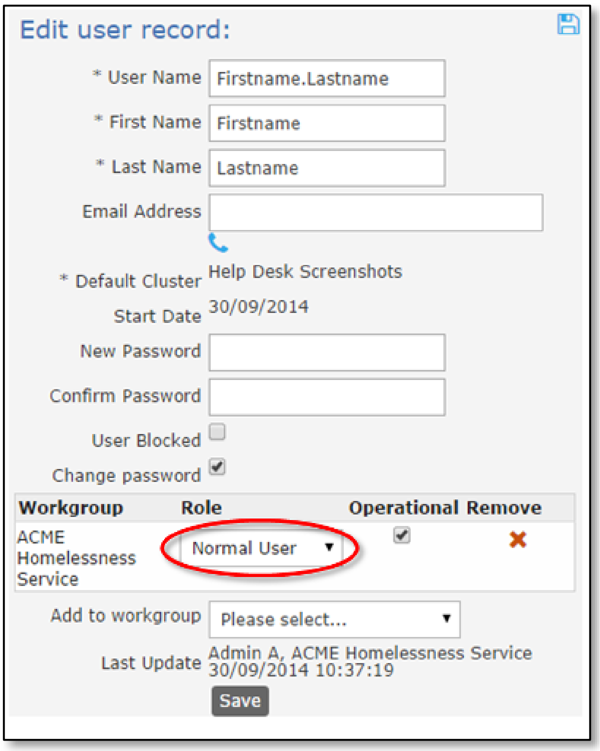


2. Enter the new User Name (User id). Please note that:
   - The **User Name** is case sensitive.
   - It is recommended that the naming convention of ‘Firstname.Lastname’ be followed. For example, if the user’s name is John Smith, the new **User Name** should be ‘John.Smith’.
   - The **User Name** 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**.

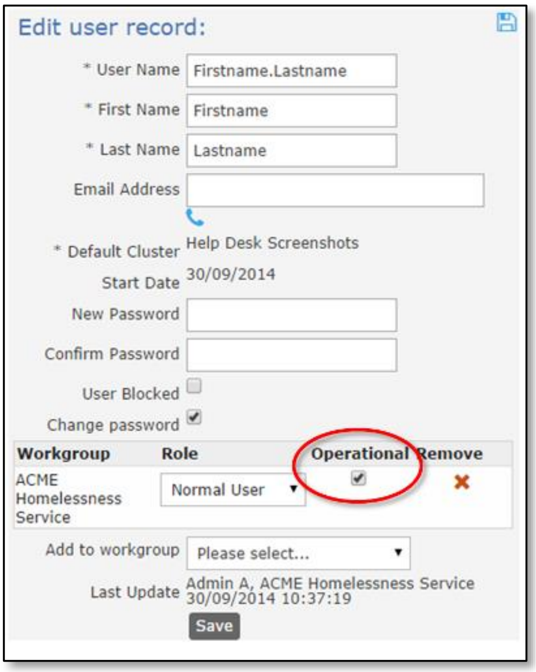


9. The access level for the Workgroup will default to ‘Normal User’. If a different access level is required, select the correct access level from the list (highlighted below). Most users should be given ‘Normal User’ access level. Managers and team leaders may be given ‘Coordinator’ access level. Administration 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).



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.

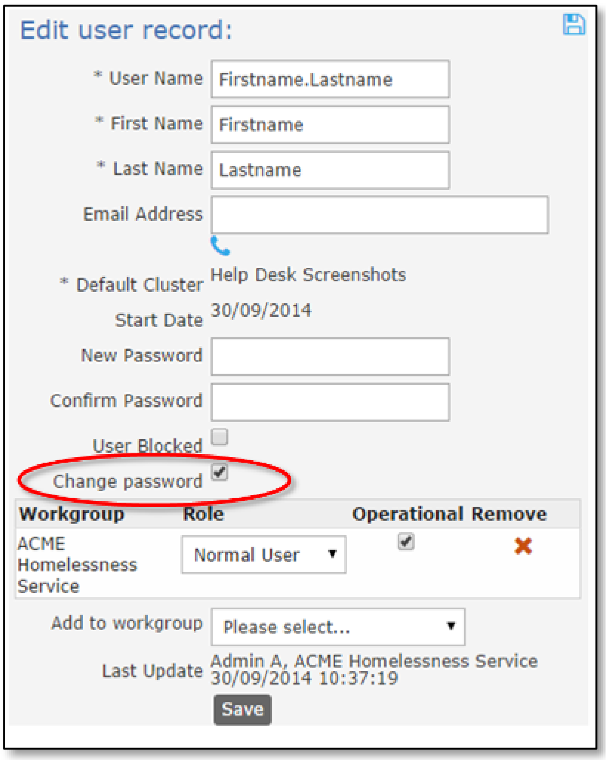


11.4 Resetting a Password for a user

To reset a user's password:

Steps

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

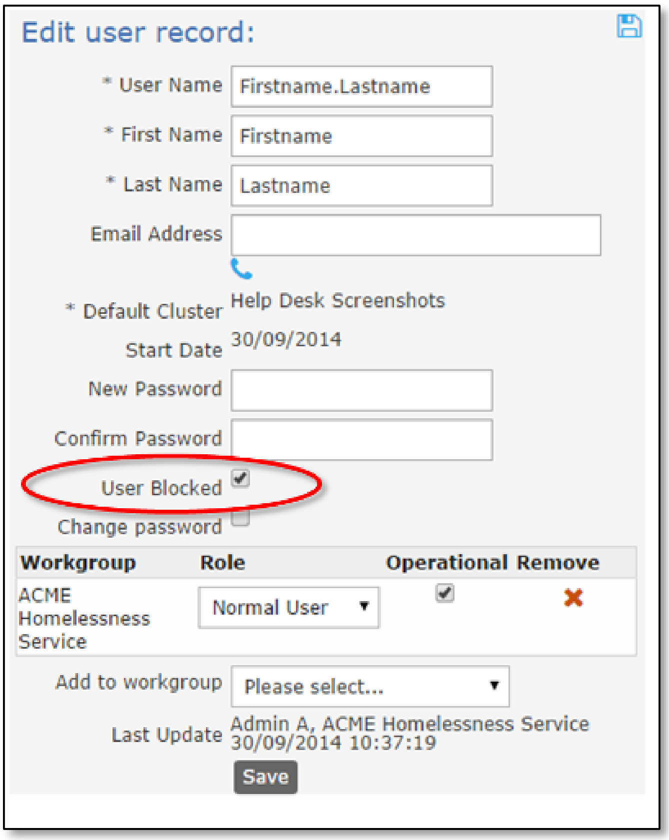


2. Enter the **New Password** and re-enter the password in **Confirm Password**.
3. Tick the **Change Password** checkbox (highlighted above) which will force the user to change their password the next time they log into the application.

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.



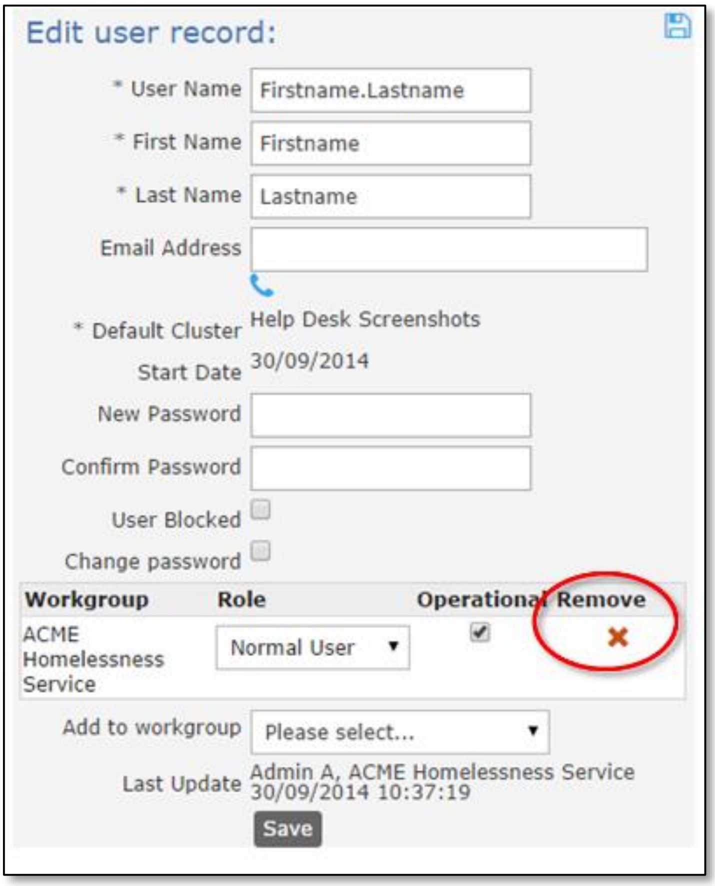
The user account can be unblocked by unchecking the **User Blocked** check box (highlighted above) and clicking **Save.**

11.6 Removing User Access

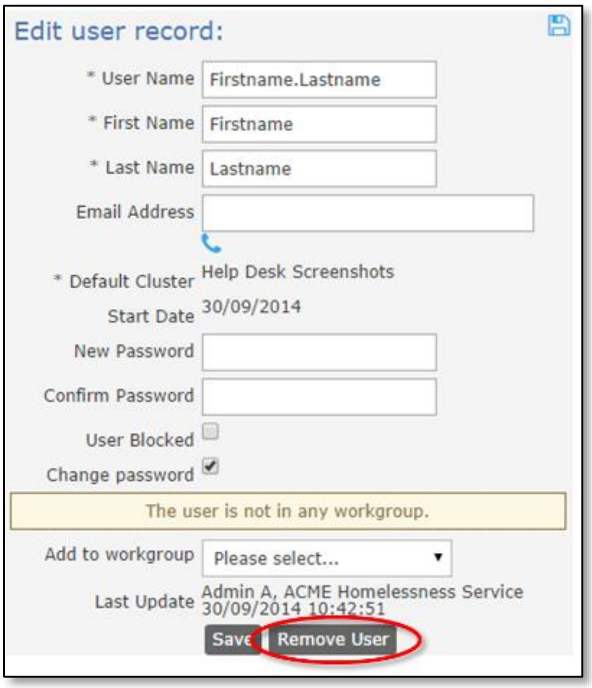
To remove the active user account from the system:

<u>Steps</u>

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



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.



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.

Steps

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