User Guide 2010

S2Splus Service Record System

Administrators and Coordinators
Friday 30 April 2010

S2Splus
Service record system
An Infoxchange enterprise

Acknowledgement

Infoxchange Australia acknowledges the contribution of Micah Projects to the development of the Service Record System (SRS).

User Guide 2010

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Section 1

Introduction

1.0 Introduction

Service Record System (SRS) is an online client management system designed specifically for the community services sector. SRS enables organisations to record all information regarding individuals and families receiving support. It also generates reports to assist with managing service delivery or to provide information to stakeholders, such as the Australian Institute of Health and Welfare (AIHW).

The system is shared across teams within an organisation and can be accessed from any computer with an internet connection. Depending on your level of access the screens within this User Guide may look a little different. Employees will have more or less menus available to them depending on what is required to undertake their position.

Normally one person within an organisation will be provided access to the Service Record System (SRS) and will add users and assign roles. The Normal User and Reception Worker access levels are covered in a separate User Guide. The Administrator and Coordinator access levels are covered in this User Guide.

Section 2

Administrator Access Level

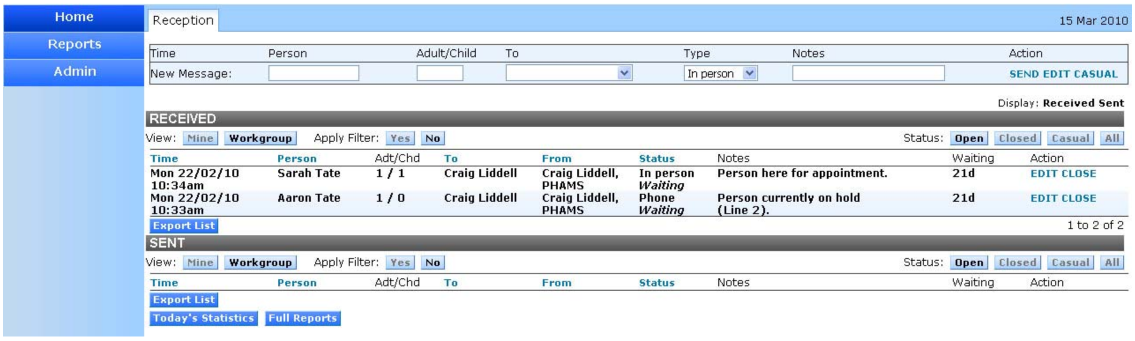
User Guide 2010

2.0 Administrator Access Level

Administrator access level enables you to access the following Sections: Home, Reports, and Admin.

2.1 Home Section

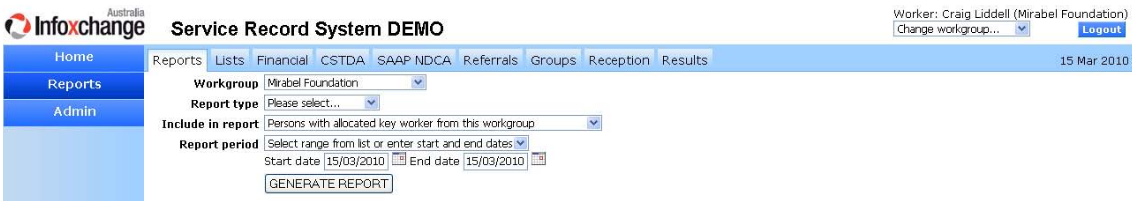
Only the Reception Tab is available in the Home Section.



As detailed in the Normal User Guide, the Reception Tab enables you to send and receive messages to your Workgroup and Cluster. It also enables you to record Casual Contacts.

2.2 Reports Section

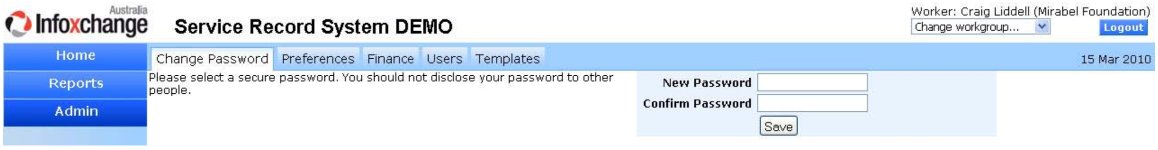
Administrator Access Level enables you to access the Reports Section.



Instructions for generating Reports are detailed in the Normal User Guide.

2.3 Admin Section

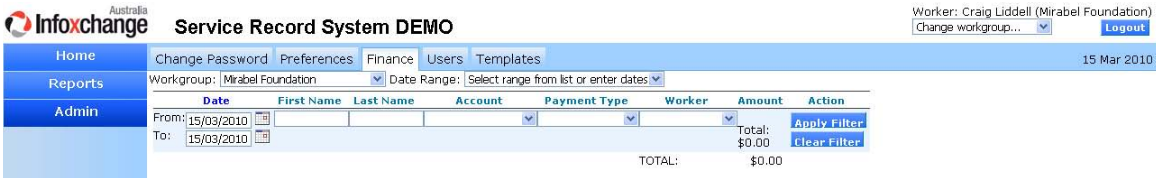
Administrator Access Level allows you additional privileges beyond Normal User and Reception Worker access levels. You are able to generate Finance reports and manage Users.

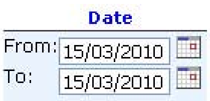


2.3.1 Financial Transactions

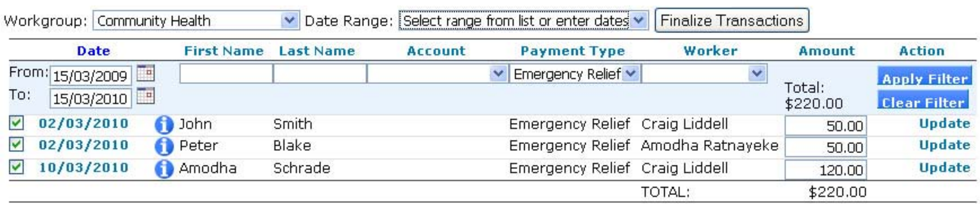
To generate a list of financial transactions:

1. Select a date range by either using the blue pull down menu at the top of the screen or by using the calendar icon.





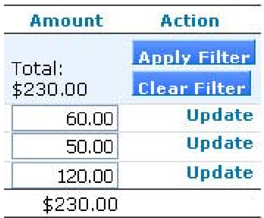
2. You can filter by Date, First Name, Last Name, Account, Payment Type, or Worker. Once one of the options has been selected, Click 'Apply Filter'.



Please note that:

» Clicking on the Date will take you to the detailed transaction record.

» You can update the transaction amount by entering the updated figure in the Amount field and clicking Update.

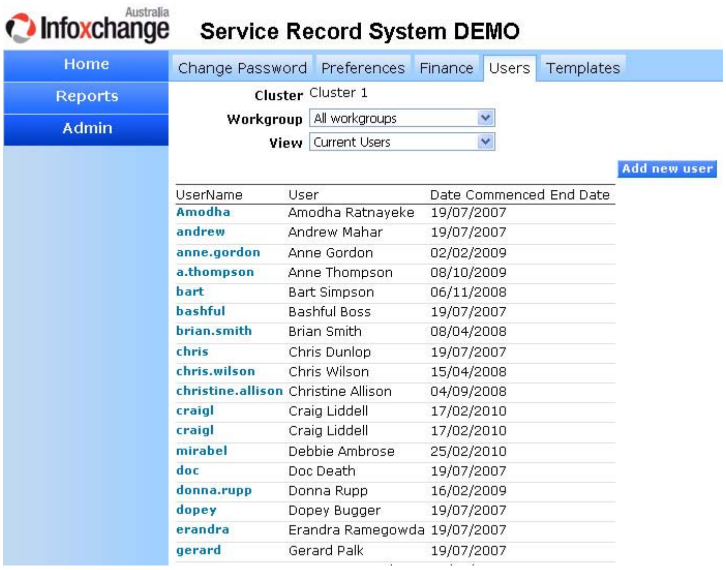


» Clicking on ‘Finalize Transactions’ locks the transactions that have been selected by using the tick box on the left hand side. You are unable to edit finalised transactions.

» Organisations often finalise transactions following reconciliation of SRS records and internal financial systems.

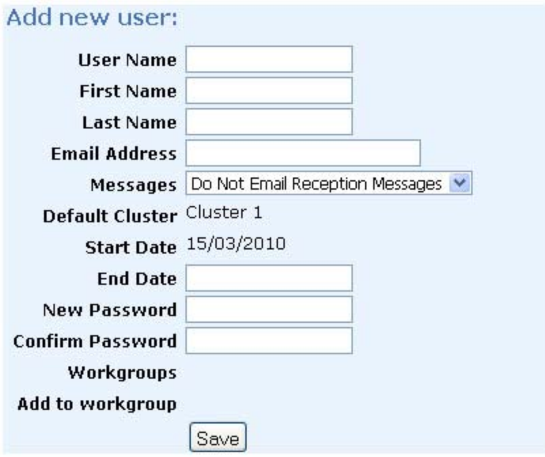
2.3.2 Manage Users

Administrator access level also allows you to manage Users.

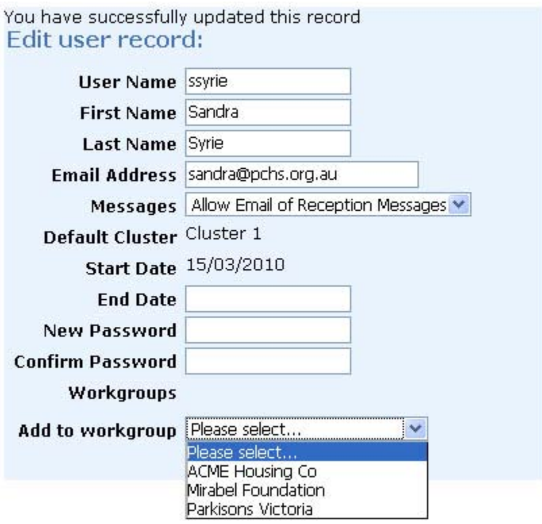


To add a new User:

1. Click ‘Add new user’ and the following dialog box will appear.



2. Enter the User Name, First Name, Last Name, and Email Address.
3. Select whether the User will be able to receive reception messages via email by using the blue pull down menu.
4. Enter an End Date should you wish to limit the access period. For example, when the User has a time limited contract with your organisation.
5. Enter the password in the New Password and Confirm Password fields.
6. Click Save. The following dialog box will appear.



7. Add the User to Workgroups by using the blue pull down menu.
8. Click Save.
9. Service Record System (SRS) will prompt you to nominate an access level. There are four options: Administrator, Coordinator, Normal User, and Reception Worker.

10. Click Save.

Please note that:

» When you have selected the tick box to the right of the access level, a staff member will be provided with all rights associated with the access level as detailed overleaf.

» Should the tick box be unchecked, a staff member will be provided with all rights associated with the access level, but will not appear as a Worker within Workgroups or in any pull down menus where you can select a Worker.

» For example, a ‘non-operational’ staff member at a head office may require access to all data for the purposes of monitoring and reporting. However, he or she is not a Worker for the purposes of case and client management.

» A staff member who has Coordinator access level can also delete certain items, such as Notes or Plans.

» To remove a user from a Workgroup, click **Remove from group**.

Normal User and Reception Worker Access Levels

Sections Available	Tabs Available	Normal User	Reception Worker
Home	My List My Team's List My Actions My Team's Actions Referrals Reception	All	Reception
Persons	Search Details Notes Alerts Consent Referrals Plans Payments Tasks Outcomes Documents Membership	All	None
Groups	Groups Waiting Lists Fulfilment Activity Management	All	None

Normal User and Reception Worker Access Levels: Continued

Sections Available	Tabs Available	Normal User	Reception Worker
Days	Notes Payments Tasks Accomodation	Notes Payments Tasks	None
Reports	Reports Lists Financial Referrals Groups Reception Results	All	None
Admin	Change Password Preferences Finance Merge Users Templates	Change Password Preferences	Change Password Preferences

Administrator and Coordinator Access Levels

Sections Available	Tabs Available	Administrator	Coordinator
Home	My List My Team's List My Actions My Team's Actions Referrals Reception	Reception	All
Persons	Search Details Notes Alerts Consent Referrals Plans Payments Tasks Outcomes Documents Membership	None	All
Groups	Groups Waiting Lists Fulfilment Activity Management	None	All

Administrator and Coordinator Access Levels: Continued

Sections Available	Tabs Available	Administrator	Coordinator
Days	Notes Payments Tasks Accomodation	None	All
Reports	Reports Lists Financial Referrals Groups Reception Results	All	All
Admin	Change Password Preferences Finance Merge Users Templates	Change Password Preferences Finance Users Templates	All

Section 3

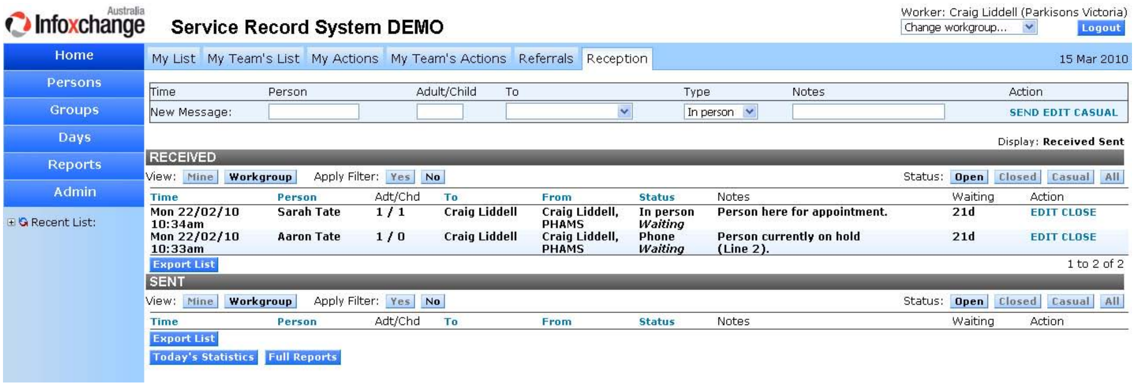
Coordinator Access Level

3.0 Coordinator Access Level

Coordinator Access allows you to access six Sections: Home, Persons, Groups, Days, Reports, and Admin.

3.1 Home Section

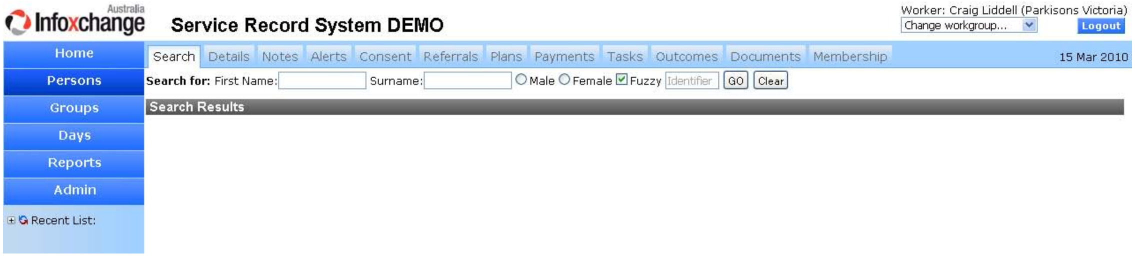
The following tabs are available in the Home Section: My List, My Team's List, My Actions, My Team's Actions, Referrals, and Reception.



As detailed in the Normal User Guide, the Home Section provides an overview of your actions and those of your team that have been allocated in the Service Record System (SRS). These actions include any tasks recorded in the 'Task' section of an individual's SRS record, any documents that are due to be reviewed, any plans for a review, and any plan actions due. It also includes Alerts and Consent, for example, when such functionality is customised for your Workgroup or organisation.

3.2 Persons Section

The Persons Section is used to record information about individuals and families receiving planned support and ongoing casual or crisis assistance. There are a number of tab options under the Persons section.



Functions available in each of the tabs in the Persons Section are detailed in the Normal User Guide.

3.3 Groups Section

In the Groups Section, you can manage and create Groups. There are four key sections: Groups, Waiting Lists, Fulfilment, and Management. Fulfilments include labels and mailing lists, as a couple of examples.

Functions available in each of the tabs in the Groups Section are detailed in the Normal User Guide.

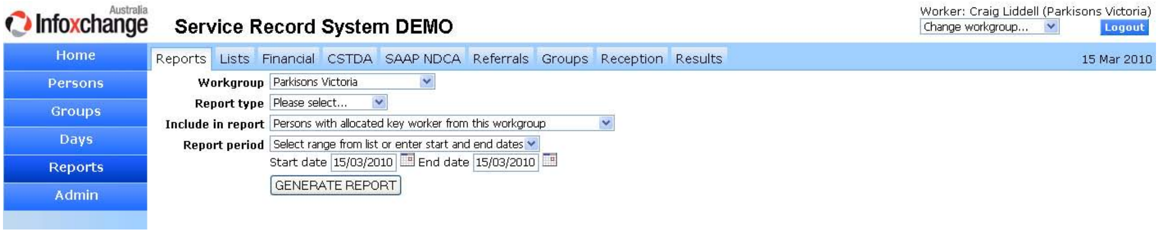
3.4 Days Section

The Days Section is used to record information about individuals and families receiving accommodation assistance.

Functions available in each of the tabs in the Days Section are detailed in the Normal User Guide.

3.5 Reports Section

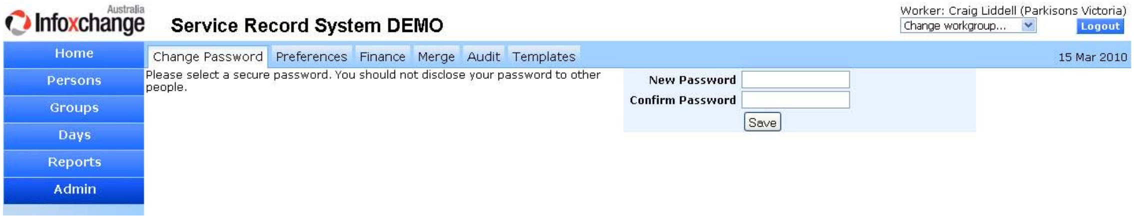
The Reports Section allows you to generate a wide range of reports to assist with organisational management and reporting to stakeholders. There are seven distinct sections: Reports, Lists, Financial, Referrals, Groups, Reception, and Results.



Functions available in each of the tabs in the Persons Section are detailed in the Normal User Guide.

3.6 Admin Section

The Admin Section allows you to generate a wide range of reports to assist with organisational management and reporting to stakeholders. There are six distinct sections: Change Password, Preferences, Finance, Merge, Audit, and Template.



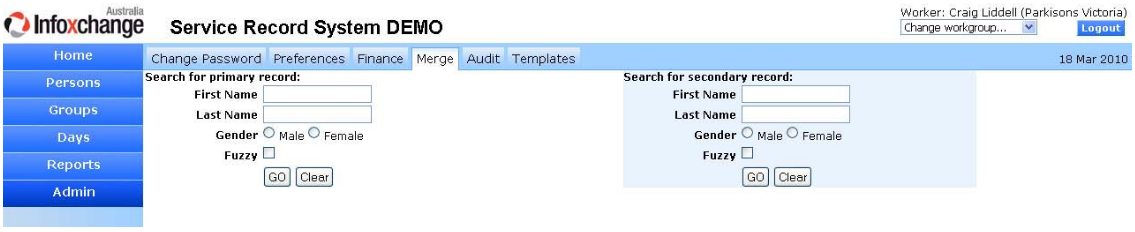
Coordinator Access has two tabs that are not available to any other user: Merge and Audit.

3.6.1 Merge Tab

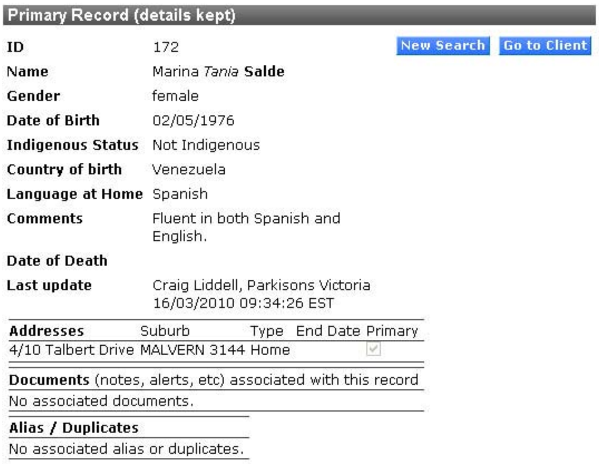
The Merge Tab enables you to merge duplicate records for the same person. For example, two Workers may have individually entered client details and one record is incorrect.
The Merge Tab enables you to combine both the primary and secondary records.

To merge two records:

1. Click the Merge Tab and the following dialog box will appear.



3. Open enables you to view the Person record. Click Select once you confirm it is the primary record. The following dialog box will appear.



Primary Record (details kept)

New Search | Go to Client

ID	172
Name	Marina *Tania* **Salde**
Gender	female
Date of Birth	02/05/1976
Indigenous Status	Not Indigenous
Country of birth	Venezuela
Language at Home	Spanish
Comments	Fluent in both Spanish and English.
Date of Death	
Last update	Craig Liddell, Parkisons Victoria 16/03/2010 09:34:26 EST

Addresses	Suburb	Type	End Date	Primary
4/10 Talbert Drive	MALVERN 3144	Home		✓

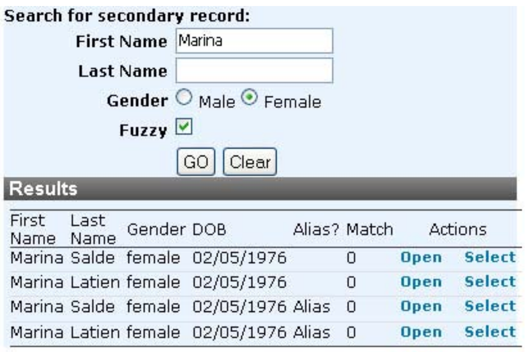
Documents (notes, alerts, etc) associated with this record

No associated documents.

Alias / Duplicates

No associated alias or duplicates.

4. In ‘Search for secondary record:’, enter the First Name and / or Last Name. Click ‘Fuzzy’ to enable Service Record System (SRS) to match partial or incorrect spelling. The following dialog box appears.



Search for secondary record:

First Name: Marina

Last Name:

Gender: Male / Female (selected)

Fuzzy: ✓

GO | Clear

Results

First Name	Last Name	Gender	DOB	Alias?	Match	Actions	
Marina	Salde	female	02/05/1976		0	Open	Select
Marina	Latien	female	02/05/1976		0	Open	Select
Marina	Salde	female	02/05/1976	Alias	0	Open	Select
Marina	Latien	female	02/05/1976	Alias	0	Open	Select

5. Open enables you to view the Person record.

Secondary (Merge) Record

New Search | Go to Client

ID	173
Name	Marina *Tania* **Latien**
Gender	female
Date of Birth	02/05/1976
Indigenous Status	Not Indigenous
Country of birth	Venezuela
Language at Home	Spanish
Comments	Fluent in both Spanish and English.
Date of Death	
Last update	Craig Liddell, Parkisons Victoria 16/03/2010 09:38:00 EST

Addresses	Suburb	Type	End Date	Primary
4/10 Talbert Drive	MALVERN 3144	Home		✓

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

No associated documents.

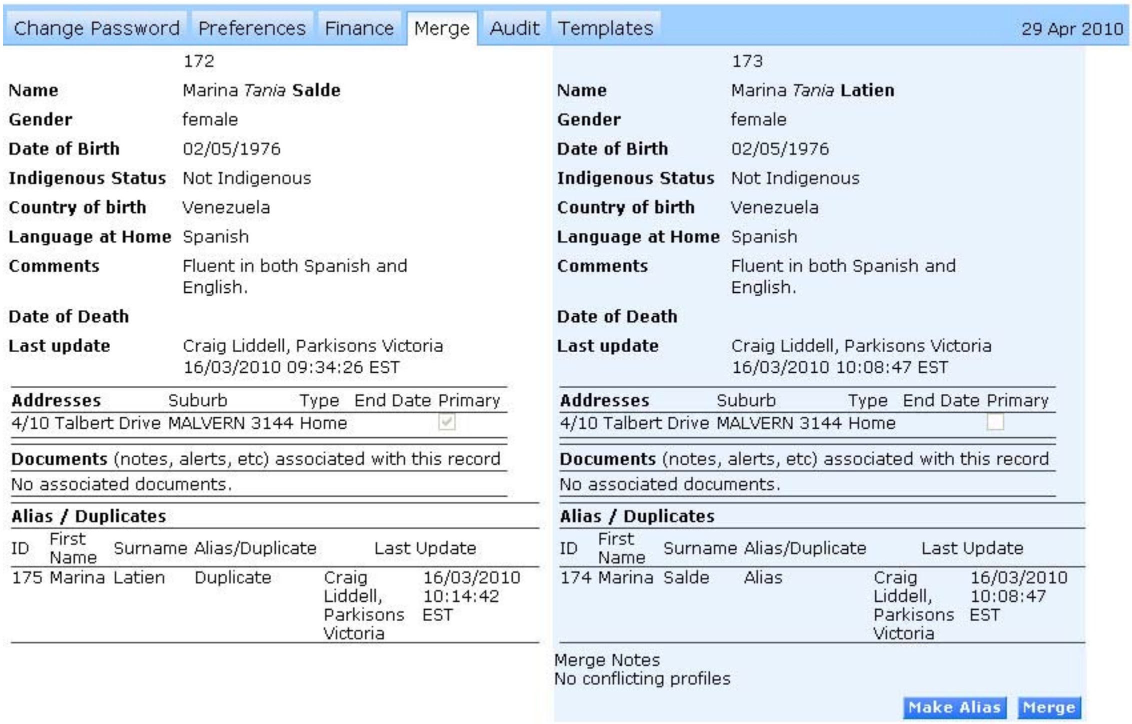
Alias / Duplicates

ID	First Name	Surname	Alias/Duplicate		Last Update
174	Marina	Salde	Alias	Craig Liddell, Parkisons Victoria	16/03/2010 09:55:11 EST

Merge Notes
No conflicting profiles
A person can have only one primary address. The primary status will be removed from the primary address associated with the merge record.

Make Alias | Merge

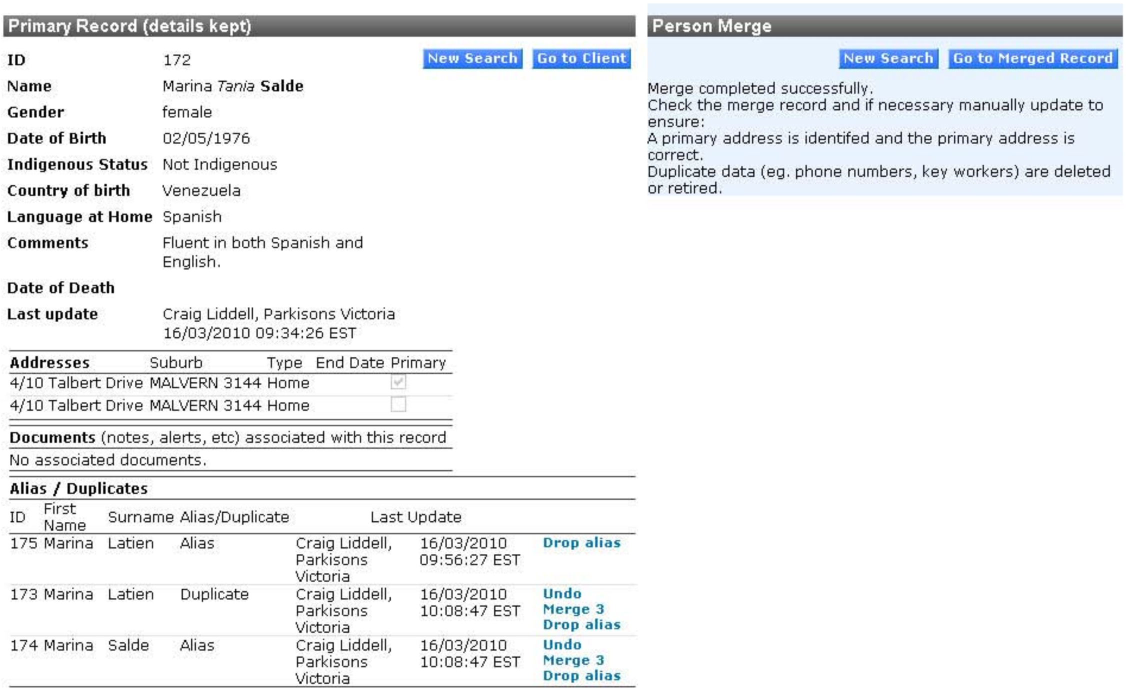
6. Carefully consider both records to ensure they relate to the same client before clicking Merge.



7. You have the option of either creating the Secondary Record as an Alias of the Primary Record or merging the two records. Click Merge and the following dialog box will appear.

8. Click OK or Cancel.

The following screen will appear.



Primary Record (details kept)

New Search | Go to Client

ID	172
Name	Marina *Tania* **Salde**
Gender	female
Date of Birth	02/05/1976
Indigenous Status	Not Indigenous
Country of birth	Venezuela
Language at Home	Spanish
Comments	Fluent in both Spanish and English.
Date of Death	
Last update	Craig Liddell, Parkisons Victoria 16/03/2010 09:34:26 EST

Addresses	Suburb	Type	End Date	Primary
4/10 Talbert Drive	MALVERN 3144	Home		☑
4/10 Talbert Drive	MALVERN 3144	Home		☐

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

No associated documents.

Alias / Duplicates

ID	First Name	Surname	Alias/Duplicate	Last Update		
175	Marina	Latien	Alias	Craig Liddell, Parkisons Victoria	16/03/2010 09:56:27 EST	Drop alias
173	Marina	Latien	Duplicate	Craig Liddell, Parkisons Victoria	16/03/2010 10:08:47 EST	Undo Merge 3 Drop alias
174	Marina	Salde	Alias	Craig Liddell, Parkisons Victoria	16/03/2010 10:08:47 EST	Undo Merge 3 Drop alias

Person Merge

New Search | Go to Merged Record

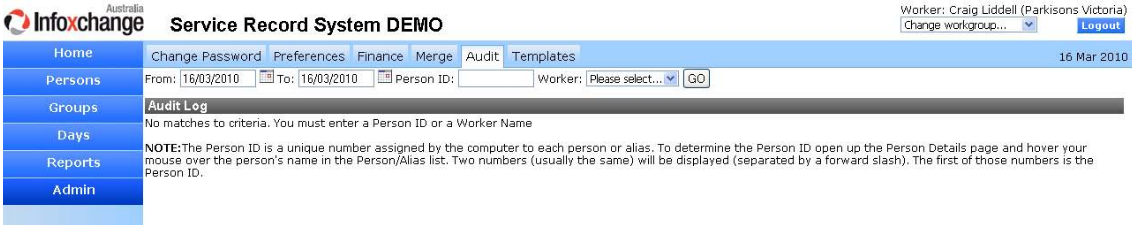
Merge completed successfully.
Check the merge record and if necessary manually update to ensure:
A primary address is identifed and the primary address is correct.
Duplicate data (eg. phone numbers, key workers) are deleted or retired.

Please note:

- On the top right hand corner of the screen Service Record System (SRS) has noted that the 'Merge completed successfully'.
- You will be unable to merge two records that contain Profiles with overlapping dates.
  In this instance, you can either delete one Profile prior to the merge or alter the dates of the Profile.
- You also have the option to 'Drop alias', which enables you to delete an alias that has been incorrectly entered or is no longer valid, as a couple of examples.
- When you merge two records, the demographic information contained in the second record will essentially be deleted. However, you do have the option of identifying the second record as an Alias to the primary record by clicking 'Make Alias' at the bottom of the Secondary Record.
- You also have the option to 'Undo Merge'. Even when you go to another Section of SRS, you can return to the Merge Tab, search for a Person record that has previously been merged, and undo.

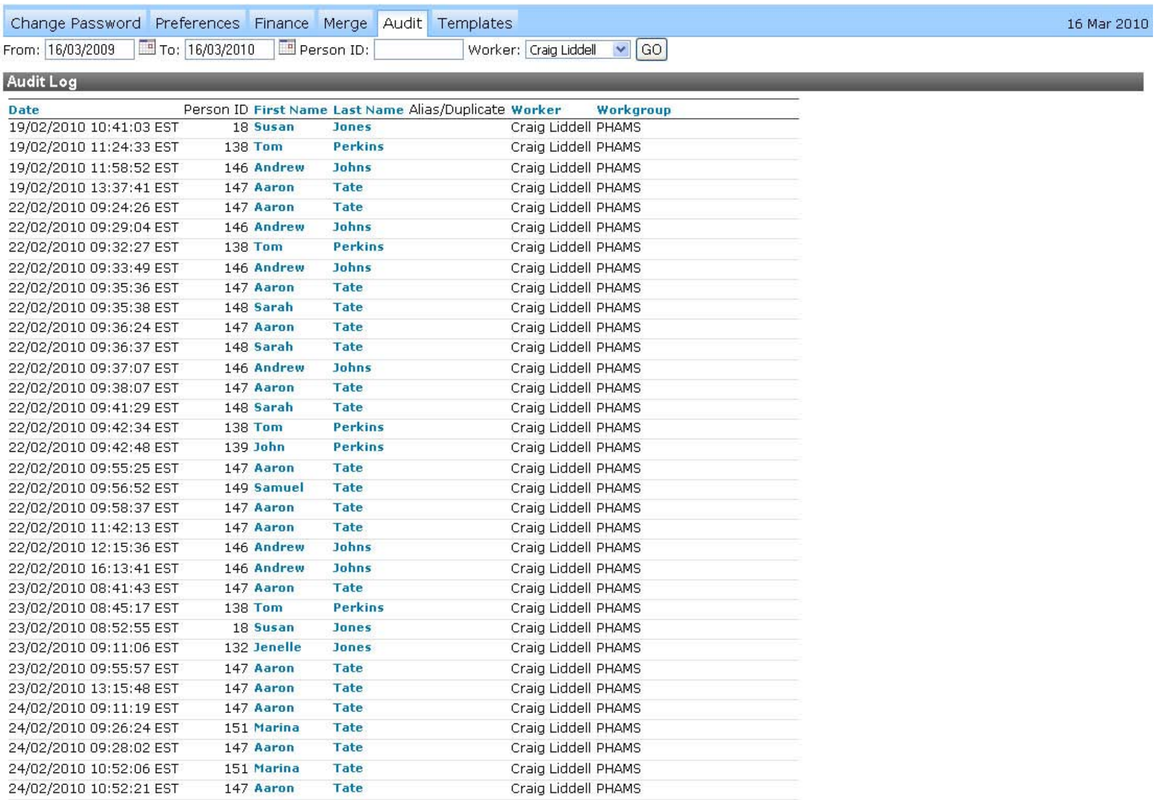
3.6.2 Audit

The Audit Tab enables you to review the activities of individual Workers or clients over a period of time.



To undertake an Audit:

1. Select the date range by using the calendar icons.
2. Select the Worker by using the blue pull down menu.
3. Click GO. The following screen will appear.


Change Password | Preferences | Finance | Merge | Audit | Templates — 16 Mar 2010

From: 16/03/2009 To: 16/03/2010 Person ID: Worker: Craig Liddell GO

Audit Log

Date	Person ID	First Name	Last Name	Alias/Duplicate	Worker	Workgroup
19/02/2010 10:41:03 EST	18	Susan	Jones		Craig Liddell	PHAMS
19/02/2010 11:24:33 EST	138	Tom	Perkins		Craig Liddell	PHAMS
19/02/2010 11:58:52 EST	146	Andrew	Johns		Craig Liddell	PHAMS
19/02/2010 13:37:41 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:24:26 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:29:04 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 09:32:27 EST	138	Tom	Perkins		Craig Liddell	PHAMS
22/02/2010 09:33:49 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 09:35:36 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:35:38 EST	148	Sarah	Tate		Craig Liddell	PHAMS
22/02/2010 09:36:24 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:36:37 EST	148	Sarah	Tate		Craig Liddell	PHAMS
22/02/2010 09:37:07 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 09:38:07 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:41:29 EST	148	Sarah	Tate		Craig Liddell	PHAMS
22/02/2010 09:42:34 EST	138	Tom	Perkins		Craig Liddell	PHAMS
22/02/2010 09:42:48 EST	139	John	Perkins		Craig Liddell	PHAMS
22/02/2010 09:55:25 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:56:52 EST	149	Samuel	Tate		Craig Liddell	PHAMS
22/02/2010 09:58:37 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 11:42:13 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 12:15:36 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 16:13:41 EST	146	Andrew	Johns		Craig Liddell	PHAMS
23/02/2010 08:41:43 EST	147	Aaron	Tate		Craig Liddell	PHAMS
23/02/2010 08:45:17 EST	138	Tom	Perkins		Craig Liddell	PHAMS
23/02/2010 08:52:55 EST	18	Susan	Jones		Craig Liddell	PHAMS
23/02/2010 09:11:06 EST	132	Jenelle	Jones		Craig Liddell	PHAMS
23/02/2010 09:55:57 EST	147	Aaron	Tate		Craig Liddell	PHAMS
23/02/2010 13:15:48 EST	147	Aaron	Tate		Craig Liddell	PHAMS
24/02/2010 09:11:19 EST	147	Aaron	Tate		Craig Liddell	PHAMS
24/02/2010 09:26:24 EST	151	Marina	Tate		Craig Liddell	PHAMS
24/02/2010 09:28:02 EST	147	Aaron	Tate		Craig Liddell	PHAMS
24/02/2010 10:52:06 EST	151	Marina	Tate		Craig Liddell	PHAMS
24/02/2010 10:52:21 EST	147	Aaron	Tate		Craig Liddell	PHAMS

- Clicking on either the First Name or Last Name of a Person will take you to his or her record.
- You can filter the list by clicking on the headings at the top of the screen. Options include: Date, First Name, Last Name, Worker, or Workgroup.
- Should you wish to audit an individual client, you can locate the ‘Person ID’ in the Person record by hovering the mouse over the name in the Person Section and Details Tab. The first number that appears is be the Primary Name Person ID and the second number is the Alias Person ID, where an alias exists.