



# **Step-by-Step User Guide**

Version 1.4

# MODULE INFORMATION

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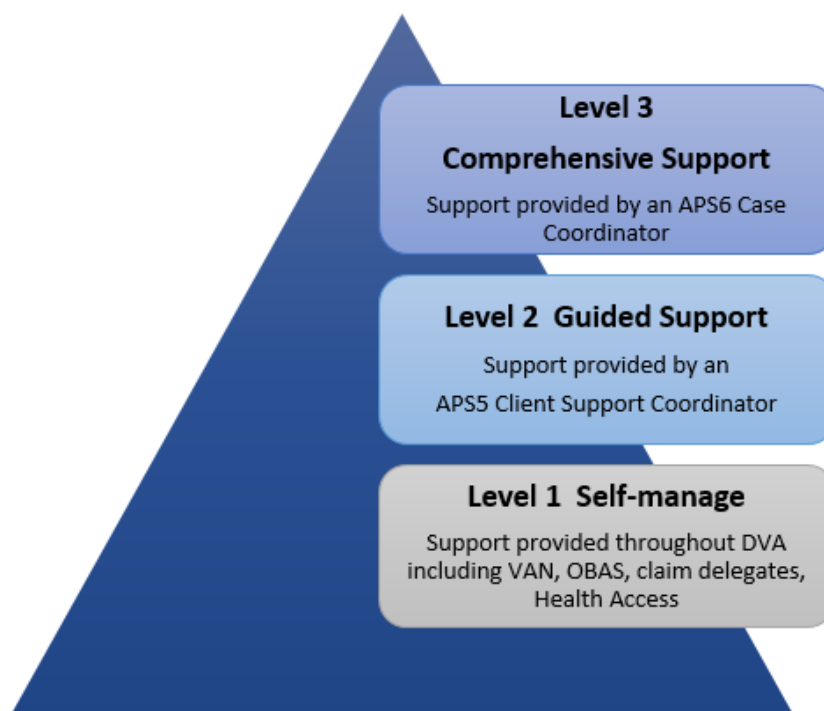
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## OVERVIEW

Since 2007 the Department has introduced a number of support programs as a result of various recommendations, including the Client Liaison Unit, Case Coordination Program and the Service Coordination Program.

The Department received additional funding in the 2015 Budget as a result of a New Policy Proposal to increase the number of Case Coordinators, with the outcome being the development of the Coordinated Client Support (CCS) service model.

CCS is an internal DVA support service provided to contemporary veterans and dependents identified as having complex and multiple needs. Identified clients are referred into the program by Departmental staff, and are assessed based on the following model:



Where a client requires management at Level 2 or Level 3, a Coordinator is appointed for a limited time period to assist that client to navigate their DVA entitlements and access other critical support services. The intent of the service is to assist with identified needs, with a view to transitioning back to 'business as usual' arrangements.

For more information see; <http://www.dva.gov.au/i-am/ex-service-organisation/coordinated-client-support> and <http://sharepoint/supportingclients/clientrelationshipmanagement/Pages/coordinatedclientsupport.aspx>

## SECURITY ACCESS

In order for a user to gain access to the CCS module within aDVance, they must work within the Coordinated Client Support area.

One of the following roles are required to perform various functions within aDVance – CCS:

- **CCSSUPERVISOR** – This is reserved for Team Leaders and allows the user to process and delete referrals, manage intake assessments, assign cases and assist with case issues.
- **CCSINTAKE** – This is reserved for Intake Officers and allows them to process referrals, and manage intake assessments.
- **CCSUSER** – This is reserved for users who perform case coordination tasks.

The below table outlines the specific access required to perform the above functions.

ROLE <sup>1</sup>	APPLICATION <sup>2</sup>	POSITION <sup>3</sup>
CCSSUPERVISOR	DVA_SupervisorCaseWorker_workspace	Dunt Supervisor, CLU Supervisor
CCSINTAKE	DVA_SupervisorCaseWorker_workspace	Dunt Supervisor, CLU Officer
CCSUSER	DVA_SupervisorCaseWorker_workspace	Dunt Supervisor, CLU Officer

The below matrix outlines what each role is permitted to do:

Action	CCSSUPERVISOR	CCSINTAKE	CCSUSER
Process a New Referral	x	x	
Delete a Referral	x		
Create a Manual CCS Case (no referral)	x	x	x
Assess a Client	x	x	X
Relink a Case	x		

**NOTE:** Users requiring access to aDVance will need to complete an [online form](#) as per normal procedures.

<sup>1</sup> Determines what the user can do with a referral.

<sup>2</sup> Allows the user to see the referral hyperlinks on their workspace.

<sup>3</sup> Allows the user to search and see old CLU/CC referrals.

# CASE PROCESS FLOW CHART

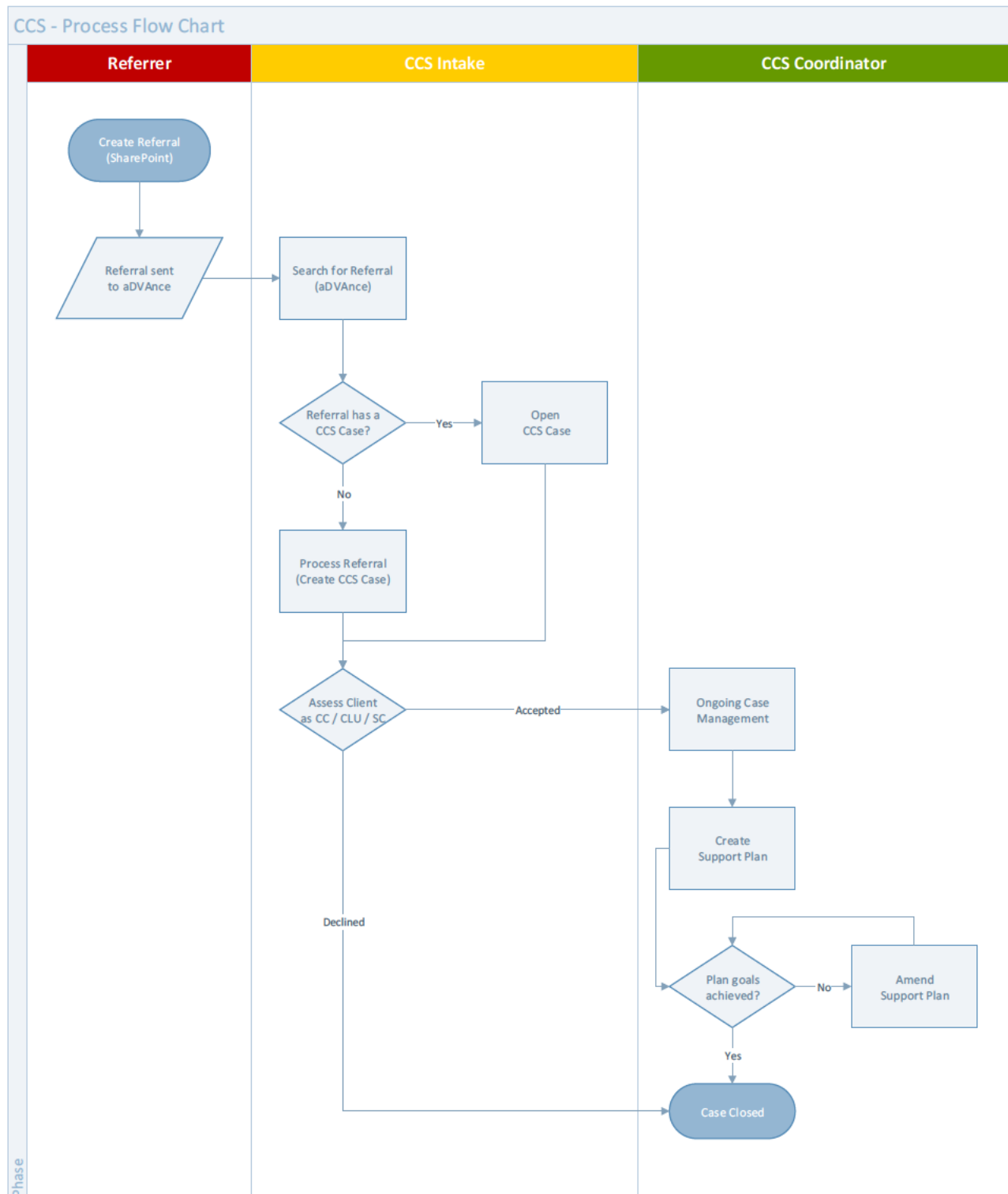


Figure 1 - Case and Referral Process Flow Chart

## REPORTING SYSTEM ISSUES

The following steps should be taken in order to report any issues and receive the appropriate support.

1. **Users** – Asking other users if they are experiencing the same issues can help identify technical vs. operational issues, and should be the first step in the investigation. If the issue persists, then contact a Product Specialist using *Figure 2*.
2. **Product Specialist (Tier 1 Support)** – Provides support to CCS staff for any operational issues when a user cannot determine the problem. The Product Specialist also determines if the issue is technical and escalates to system administrators.
3. **Business Systems Administration (Tier 2 Support)** – Investigates and analyses technical issues. Provides advice to Product Specialists and is the Primary liaison with ICT for a technical fix/solution.

The following flow chart explain the process in more detail.

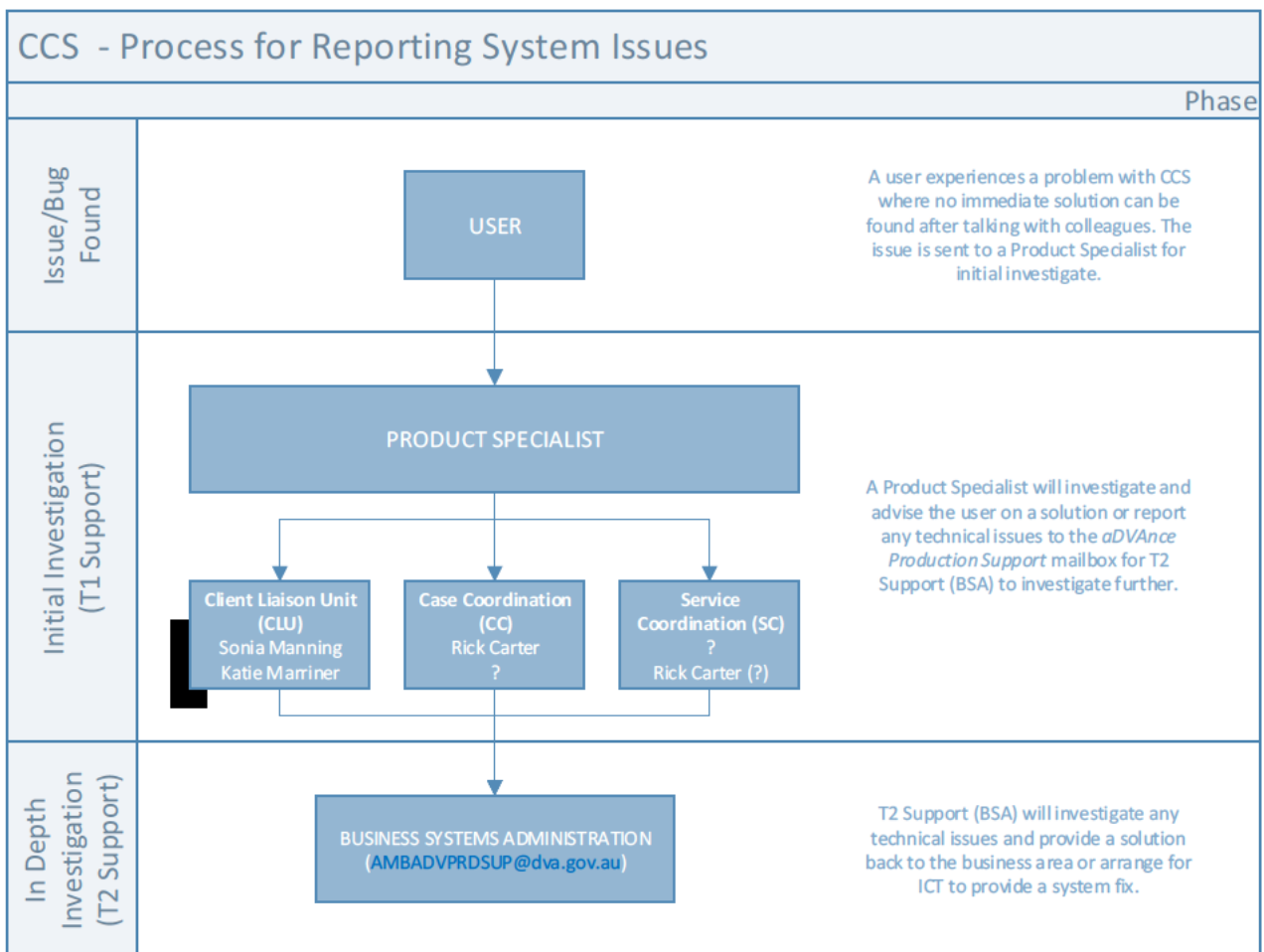


Figure 2 - Process Flow Chart for Reporting System Issues

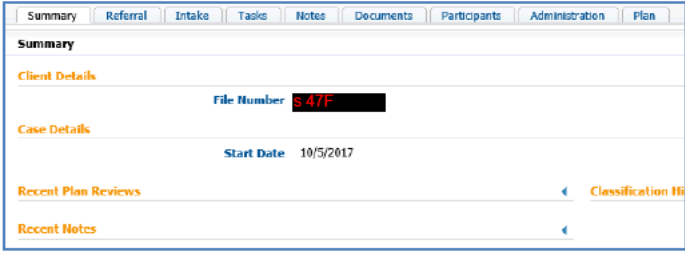
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## NAVIGATING THROUGH THIS GUIDE

This guide is organised according to the screens set out in aDVance and does not necessarily outline a business processing order. In other words, following this guide from beginning to end will not outline a logical process. It is designed in a way that provides direction in the best of circumstances.

To understand the business process flow better, refer to the [Case Process Flow Chart](#), on page 5. By referencing this chart, users can refer to sections of this guide to perform the necessary work. Consultation with Product Specialists, Supervisors and Colleagues will help clarify any steps in the case management process.

Sections in this guide are based on the below tabs found in the CCS module. E.g. *Summary* tab.



The screenshot shows the 'Summary' tab of the CCS module. The interface includes a navigation bar with tabs for Summary, Referral, Intake, Tasks, Notes, Documents, Participants, Administration, and Plan. The main content area is divided into sections: Client Details (File Number: S 47F), Case Details (Start Date: 10/5/2017), Recent Plan Reviews (Classification III), and Recent Notes.

A [Frequently Asked Questions \(FAQ's\)](#), on page 39, has been added to provide guidance in areas that may not be clear in the main portion of this guide.

# REFERRAL FORM

The Referral Form is used by all staff to refer a person to the Client Coordination Support area. The form can be found through the departments Intranet page and is external to the aDVance system.

## CREATE A REFERRAL

1. Use the following URL to access the Create Referral form;

<https://curam.main.dva/Curam/CreateReferral.html>

2. Enter a valid DVA File Number.

Select the **next field**, or press the Tab key.

Click **Select** next to the correct client being referred.

	Client UIN	Surname	First Name	Date of Birth	State
<a href="#">Select</a>	655219	STARK	TONY	29/5/1970	QLD
<a href="#">Select</a>	655220	POTTS	PEPPER	19/7/1982	QLD

3. **Review** the Client Details section.

Make **additions/changes** if required.

4. Complete any known information under **Third Party Details**.



5. Complete all mandatory Referrer Details.

**Referrer Details**

Referrer (First Name & Surname) \*  
James ██████████

Referrer Role and Business Area \*  
Appeals & Reviews

Phone Number \*  
s 47E(d)

6. Complete any known information in Sections 1, 2, 3.

*NOTE: At least one field must be completed before the referral can be created.*

**Section 1**

Section 1 - At risk of adverse individual or Departmental outcomes and/or disengagement

This may include (but is not limited to) clients who require additional assistance due to:

- Complex and multiple needs
- Risk of self-harm and/or harm to others
- Multi-morbidity (multiple mental health conditions, physical and psychological injuries, etc)
- Significant and complex injuries or traumas such as spinal or brain injuries, etc
- Social factors such as homelessness, financial, or relationship issues
- Engagement with a large number of services, Departments and/or DVA business groups

Section 1 - Other relevant information

For a client (including a veteran or a widow/widower and/or dependent child), please provide comprehensive information below to allow for a comprehensive assessment by the Coordinated Client Support Assessment Team.

This should include information such as your recent interactions with the client, details of their circumstances, the reasons you believe they require Coordinated Client Support, and any other information you believe is relevant.

---

**Section 2**

Section 2 - Critical Response

This may include (but is not limited to) cases such as:

- Operational or Service-Related Deaths
- Contemporary veterans with terminal illness
- Multiple traumas and significant combat injuries

For a client (including a veteran or a widow/widower and/or dependent child), please provide comprehensive information below to allow for a comprehensive assessment by the Coordinated Client Support Assessment Team.

This should include information such as your recent interactions with the client, details of their circumstances, the reasons you believe they require Coordinated Client Support, and any other information you believe is relevant.

---

**Section 3**

Section 3 - Behaviour (where the UCC policy has been followed and unsuccessful)

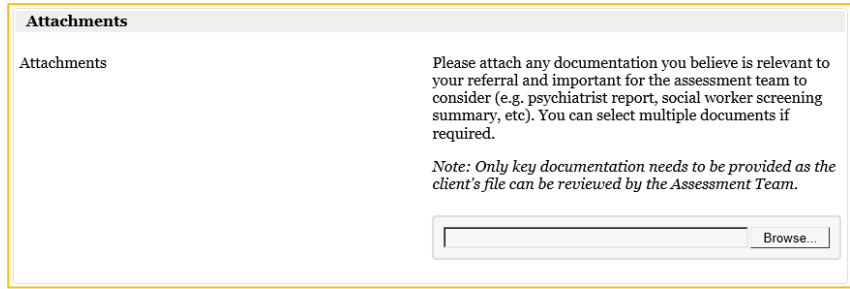
For a client (including a veteran or a widow/widower and/or dependent child), please indicate if the client has displayed any of the following:

- Unreasonable persistence
- Unreasonable demands
- Unreasonable lack of cooperation
- Unreasonable arguments
- Unreasonable behaviours

If any of the above apply please provide details including action taken by Business Group to address the behaviour. Please ensure you have consulted the *Unreasonable Complainant Conduct Policy* prior to referring any client for management due to inappropriate conduct.

Section 3 - Other relevant information

7. Click the **Browse...** button.

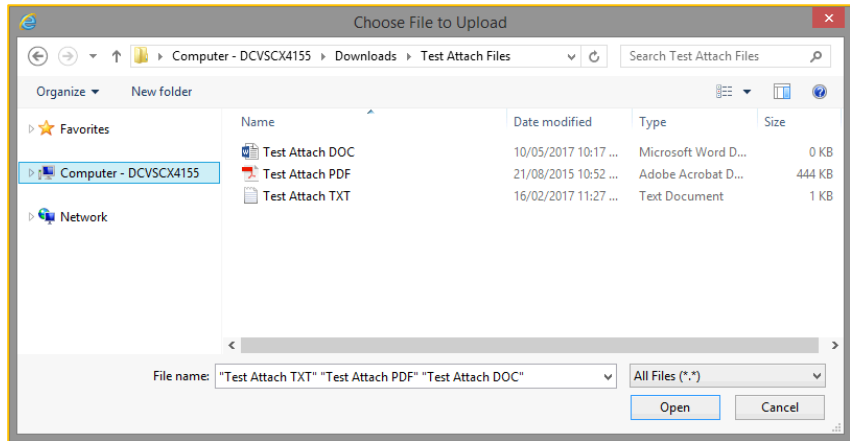


8. **Navigate** to a folder where client documents are stored.

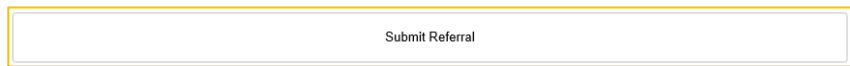
**Select a file** to attach to the referral.

Click **Open**.

*NOTE: Multiple files may be selected by hold CTRL and clicking additional files.*



9. Click the **Submit Referral** button to create the referral.



10. A message is displayed confirming that **the CCS referral was created in the aDVance application.**

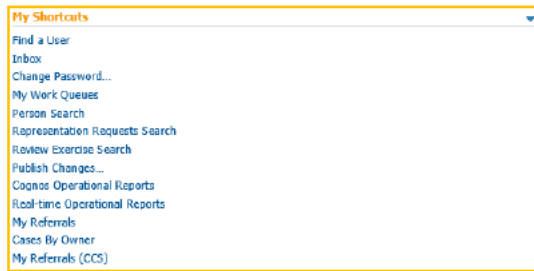
A **reference number** (aka *Referral ID*) is also generated and displayed.

Thank you for submitting your referral request. The Co-ordinated Client Support team will assess your request and inform you of the outcome. If you need to contact the Co-ordinated Client Support team about this referral then please quote the reference number 150016.

# SEARCH FOR A REFERRAL

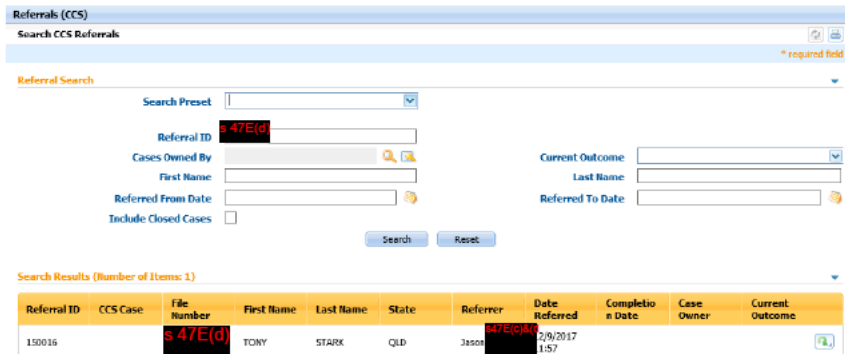
1. Open aDVance.

Click the **My Referrals (CCS)** hyperlink from the *Home* screen.



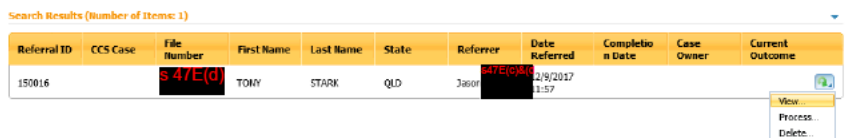
2. Enter the **Referral ID** or other known criteria.

*NOTE: This search will only find referrals that are not closed. Click the **Include Closed Cases** to include closed referrals.*



3. Click the **Action** (📄) button.

Select **View....**



4. Review the referral details.

*NOTE: Any attachments do not yet have a TRIM Reference.*

**View Referral Details**

**Client Details**

Referral Number	S 47E(d)		
DVA File Number	[REDACTED]	Surname	STARC
First Name	TONY	Date of Birth	29/5/1970
Date of Birth	29/5/1970	State Location	QLD
State Location	QLD	Serving Status	
Serving Status		Contact Number	

**Third Party Details**

Name (Third Party)	Relationship	Executive Assistant
Contact Phone Number	Email	jarvisuik@domain.com.au

**Referrer Details**

Referrer Name	James S 47E(c) & (d)	Referrer Role and Business Area
Phone Number	S 47E(c) & (d)	Defence

**Section 1**

*At risk of adverse individual or Departmental outcomes and / or disengagement*

Complex and multiple needs	Yes	Risk of self-harm and/or harm to others	Yes
Multi-morbidity (multiple mental health conditions, physical and psychological injuries, etc.)	Yes	Significant and complex injuries or traumas such as spinal or brain injuries, etc.	No
Social factors such as homelessness, financial, or relationship issues	No	Engagement with a large number of services, Departments and / or DVA business groups	No

Other relevant information

**Section 2**

**Critical response**

Operational or Service-Related Deaths	Yes	Contemporary veterans with terminal illness	No
Multiple traumas and significant combat injuries	Yes		

Other relevant information

**Section 3**

**Behaviour (where the UCC policy has been followed and unsuccessful)**

Unreasonable persistence	Yes	Unreasonable demands	No
Unreasonable lack of cooperation	Yes	Unreasonable arguments	Yes
Unreasonable behaviours	No		

Other relevant information

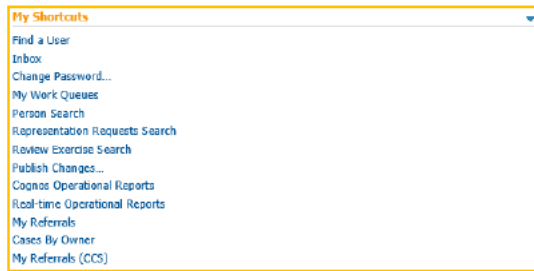
**Attachments**

TRIM Reference	File Name	Date
	Test Document 1mb.docx	12/9/2017
	Test File PDF 2MB.pdf	12/9/2017

## SEARCH FOR A REFERRAL USING PRESETS

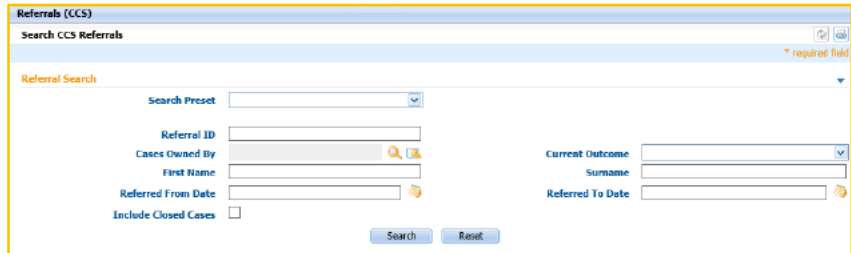
**1. Open aDVance.**

Click the **My Referrals (CCS)** hyperlink from the *Home* screen.



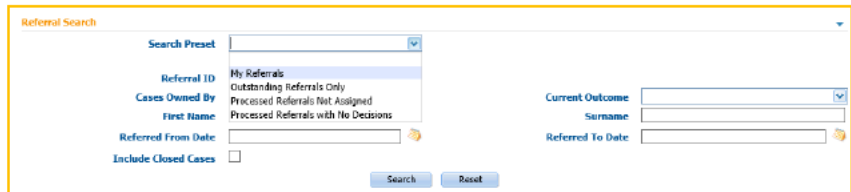
**2. Click the Search Preset drop-down box.**

*NOTE: No other search criteria is required when using a Preset.*



**3. Select one of the below presets:**

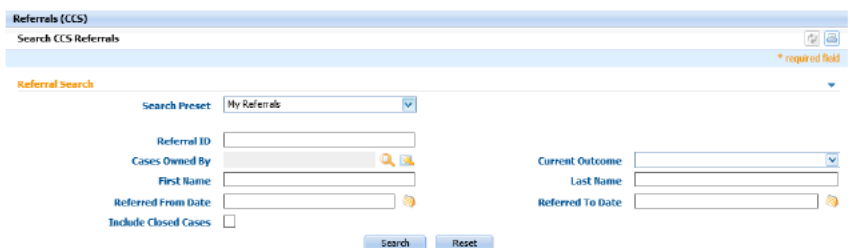
1. **My Referrals**  
Referrals with a case and assigned to you.
2. **Outstanding Referrals Only**  
All referrals with no case.
3. **Processed Referrals Not Assigned**  
All cases that are assigned to the System not a user.
4. **Processed Referrals with No Decisions**  
All cases that do not have a decision made.



Click **Search**.

**4. Search Results are displayed.**

*NOTE: This search will only find referrals that are not closed. Tick the Include Closed Cases, before searching, to include Closed referrals.*



Search Results (Number of Items: 6)

Referral ID	CCS Case	File Number	First Name	Last Name	State	Referrer	Date Referred	Completion Date	Case Owner	Current Outcome
s 47E(d)			ELIZABETH	BOOP	NSW	Arty	18/2017 0:53		Jason	s 47E(d)
			TONY	STARK	QLD	Jason	05/2017 0:19	16/8/2017	Jason	CC Level 2
			FRED	FLINSTONE	SA	Arty	15/2017 0:29		Jason	s 47E(d)
			LOUIS	SHEEHAN	SA	Gloria	05/2017 6:00		Jason	s 47E(d)
			LUCAS	STEEL	QLD	Jason	05/2017 1:58		Jason	s 47E(d)
			BRUCE	BOGTROTTE R	QLD	Jason	02/2017 9:16	28/2/2017	Jason	SC Level 3

# PROCESS A REFERRAL (CREATE A CASE)

1. Locate the *Search CCS Referrals* screen.

Click the **action** (📄) button.

Select **Process...**

Referral ID	CCS Case	File Number	First Name	Last Name	State	Referrer	Date Referred	Completion Date	Case Owner	Current Outcome
S 47E(d)		S 47E(d)	TONY	STARK	QLD	Jason	21/6/2017 1:57			

2. Click the **Search** (🔍) button.

3. Enter client details.

Click **Search**.

Click **Select**.

Action	Client UIN	Last Name	First Name	Address Line 1	State	Postcode	Date of Birth
Select	S 47E(d)	STARK	TONY	4 Stark Lane	QLD	4170	29/5/1970
Select		POTTS	PEPPER	9 Potts St	QLD	4169	19/7/1982

4. Click **Process**.

5. The new *Co-ordinated Client Support* case is created.

*NOTE: On newly processed cases, the Intake tab is displayed instead of the Summary tab. This streamlines the assessment process.*

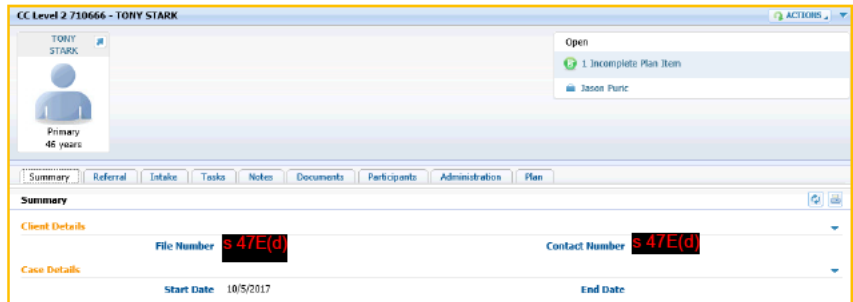
*The System User is the owner by default in order to assist with case assignment. This will later be changed by Intake officers.*

# CASE MANAGEMENT

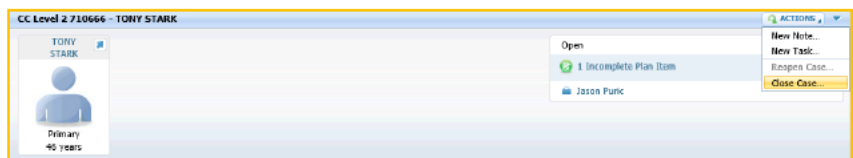
## MANUALLY CLOSE A CASE

Cases are automatically opened and closed based on the Referral Outcome. A user may require a case to be closed manually and therefore can use this process.

1. Click **ACTIONS**.

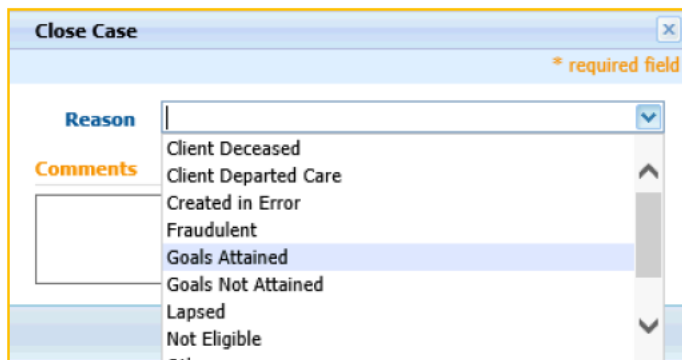


2. Select **Close Case....**



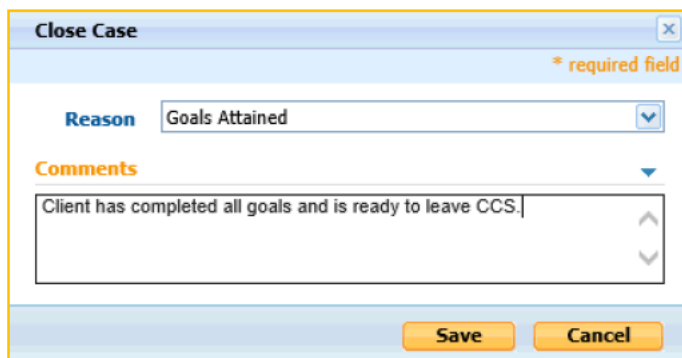
3. Click **Reason**.

Select a relevant option.

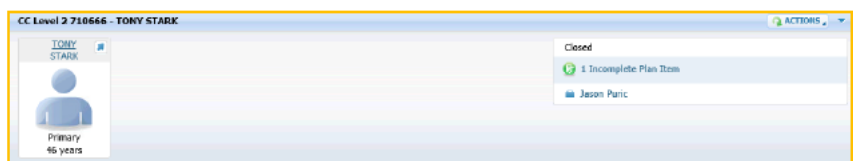


4. Add **Comments** as required.

Click **Save**.



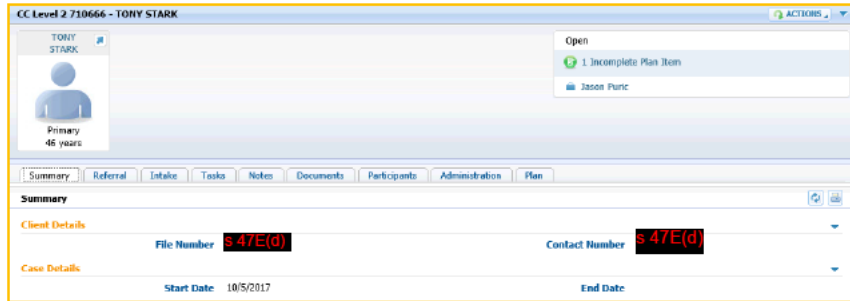
5. Confirm case status is now **Closed**.



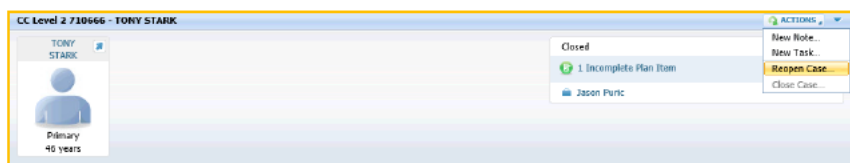
## MANUALLY REOPEN A CLOSED CASE

Cases are automatically opened and closed based on the *Referral Outcome*. A user that has manually closed a case may need it to be manually reopened.

1. Click **ACTIONS**.

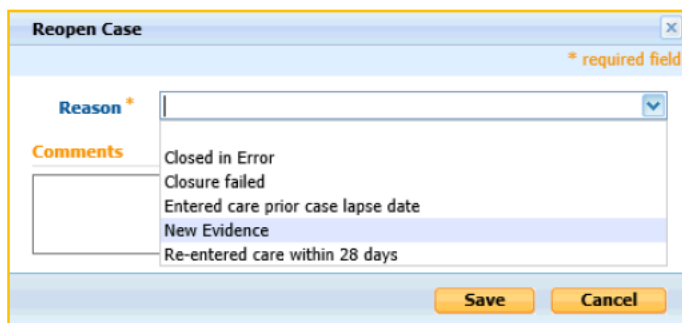


2. Select **Reopen Case...**



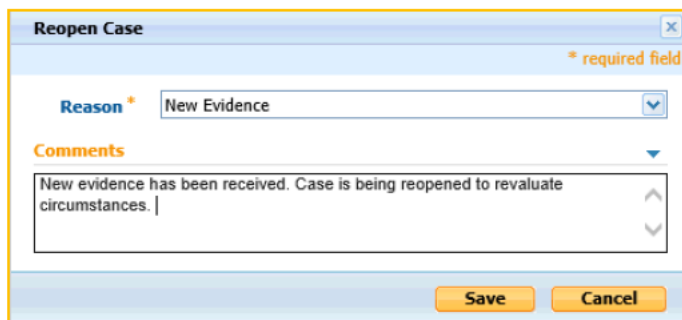
3. Click **Reason**.

Select a relevant option.

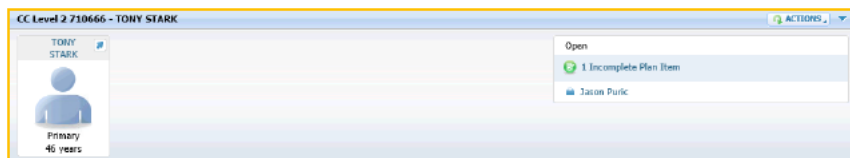


4. Add **Comments** as required.

Click **Save**.



5. Confirm case status is now **Open**.





# INTAKE

The Intake tab contains the following screens and has been designed to provide a smooth workflow, navigating down the list, with the Assessments screen last where the coordinator makes their determination.

1. **Client Information** – Information regarding the client, service details and applicable Act/s.
2. **Financial** – Financial details of the client.
3. **Family and Support** – Additional person’s information pertaining to the case itself.
4. **Benefits and Services** – Case relevant information of the clients benefit and services.
5. **Assessments** – The assessment component of the case which defines what type of case it is.

## ASSESS A CASE

1. Click **Client Information**.

**Review** any prepopulated data.

Click **Edit...**

2. **Enter** additional information.

Click **Save**.

3. Click **Financial**.

**Review** any prepopulated data.

Click **Edit...**

4. **Enter** additional information.

Click **Save**.

5. Click **Family and Support**.

**Review** any prepopulated data.

Click **Edit...**

6. **Enter** additional information.

Click **Save**.

*NOTE: To add children, use the Add Child... button on the Family and Support screen. This function only adds children to the case not the person record.*

7. Click **Add Child...** to add children to the case.

Click **Save / Save and New**.

*NOTE: Adding a child here will only add the children to the Case not the Person Record.*

8. Click **Benefits and Services**.

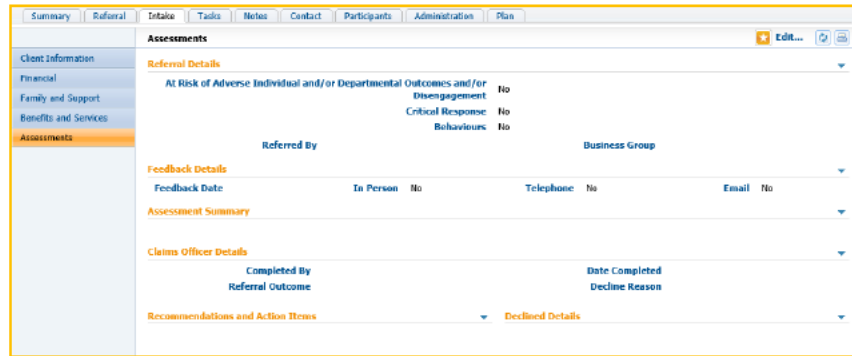
Click **Edit...**

9. **Enter** additional information.

Click **Save**.

**10. Click Assessments.**

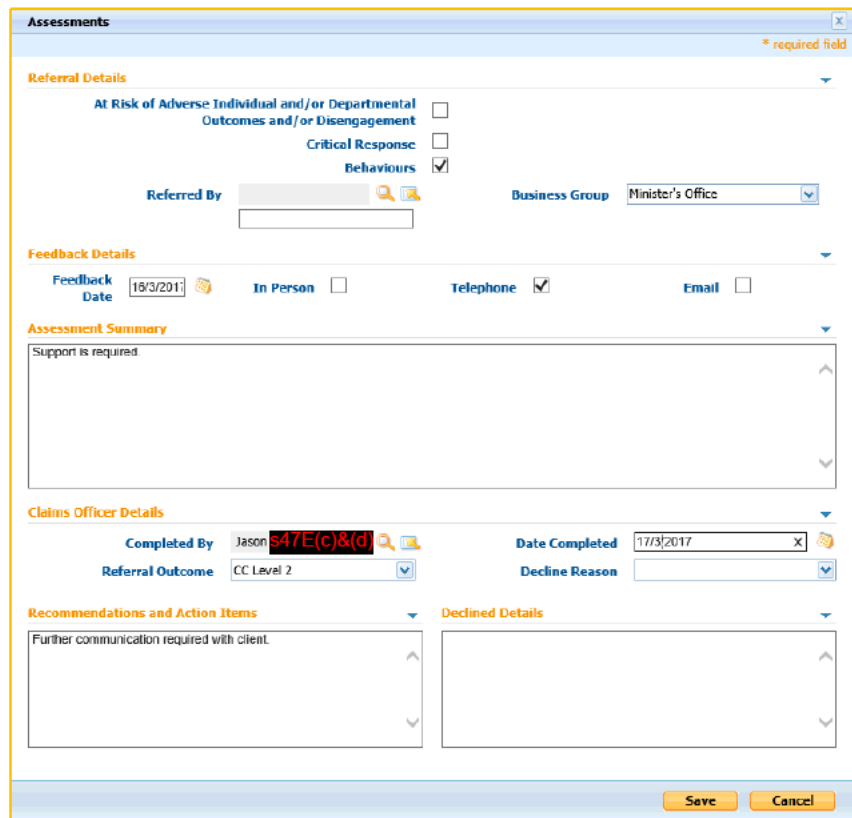
Click **Edit...**



**11. Enter additional information.**

Click **Save**.

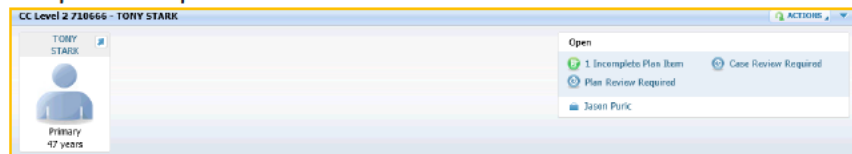
*NOTE: The Referral Outcome determines the case type and status, and is a critical field for the case.*



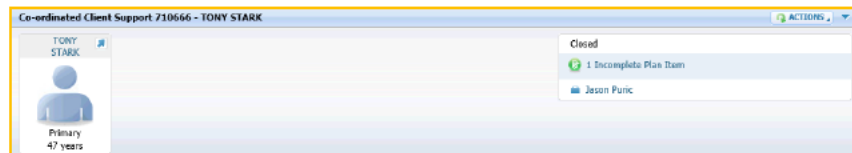
**12. Ensure that the case type and case status have changed appropriately.**

*NOTE: If the case is classified as Declined, the system will automatically close the case.*

**Accepted and Open Case**



**Declined and Closed Case**



# TASKS

Primarily used to send task/reminders to personal or colleague work queues.

## CREATE A TASK

1. Click the **Tasks** tab.

Click **New....**

2. Enter a **Subject**.

Select a **Case Participant**.

Select a **Priority**.

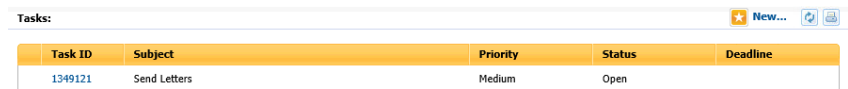
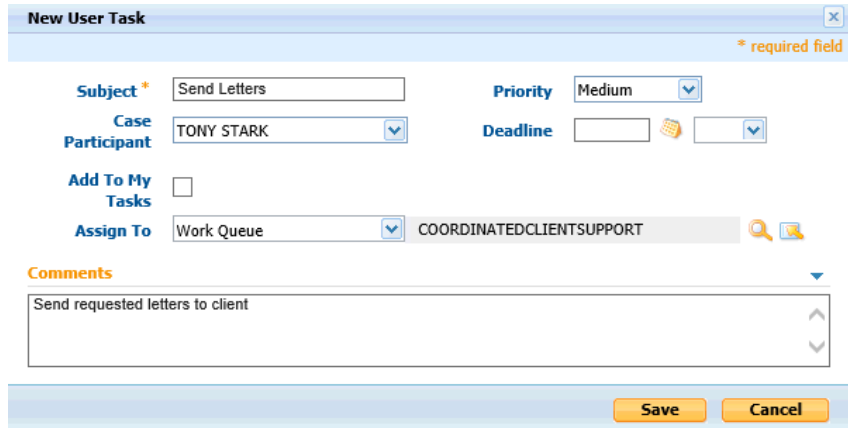
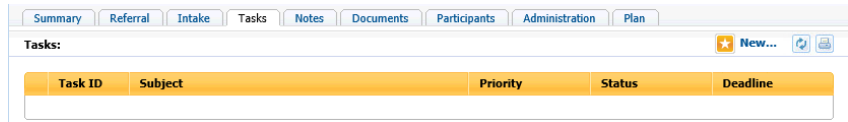
Tick **Add To My Tasks / Assign to External User, Position, User or Work Queue**

Select a **Priority**.

Select a **Deadline** (optional).

**Save.**

3. **Confirm** the new task appears correctly.



- Click the hyperlinked task ID to open the task in the Inbox tab of aDVance.

**Task 1349121** ACTIONS

**Task 1349121**

Status: Open      Worked on by:      Deadline:      2/5/2018 15:03  
 Priority: Medium      Time Worked: 00:00      Last Assigned:

Send Letters

Home    History and Comments    Assignments    Graphical View

Home

Supporting Information

Case Home Page

Important Information exists for this Person. Please review the Notes before disclosing information.

Client Details

File Number: **S.47E(d)**      Contact Number: **S.47E(d)**

Case Details

Start Date: 10/5/2017      End Date:

Recent Plan Reviews

Review Date	Review Comments	Reviewed By
10/5/2017 14:05	Support Plan has been reviewed.	Jason Puric

Classification History

Recorded On	Classification	Recorded By
4/4/2018 11:04	CC Level 2	Jason <b>S.47E(c)&amp;(d)</b>
4/4/2018 11:03	Declined	Jason <b>S.47E(c)&amp;(d)</b>
16/8/2017 15:23	CC Level 2	Jason <b>S.47E(c)&amp;(d)</b>
16/8/2017 15:20	Declined	Jason <b>S.47E(c)&amp;(d)</b>
31/7/2017 15:50	CC Level 2	Jason <b>S.47E(c)&amp;(d)</b>
10/5/2017 11:11	CC Level 2	Jason <b>S.47E(c)&amp;(d)</b>

Recent Notes

Recorded On	Note Text	Recorded By
11/8/2017 09:27	This is the comments for a note.	Jason <b>S.47E(c)&amp;(d)</b>
31/7/2017 15:49	This is a "test" to determine if double quotes (") are replaced by single (') quotes. - Typed in manually not pasted from word.	Jason <b>S.47E(c)&amp;(d)</b>
11/5/2017 10:03	This is another note.	Jason <b>S.47E(c)&amp;(d)</b>
10/5/2017 16:15	Report has been received from the Physio outlining the progress of Mr Stark during physiotherapy.	Jason <b>S.47E(c)&amp;(d)</b>

# NOTES

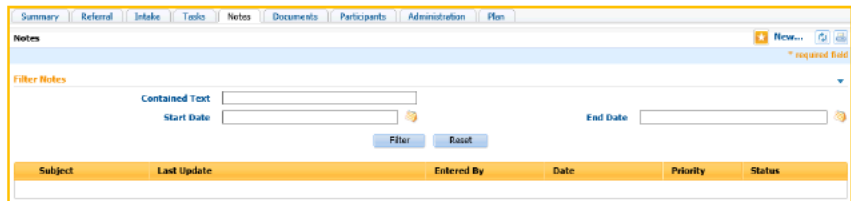
Notes allow the recording of basic case related information. Notes can be created regardless if the case is open or closed and can be stored in TRIM directly from aDVance.

**IMPORTANT:** Copying and pasting text from another source (e.g. emails) may cause corruption issues with notes. See Fix Corrupt Notes section and also see the FAQ's below.

## CREATE A NOTE

1. Click the **Notes** tab.

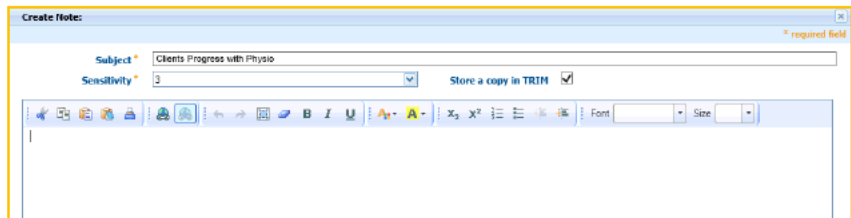
Click **New...**



2. Enter a **Subject**.

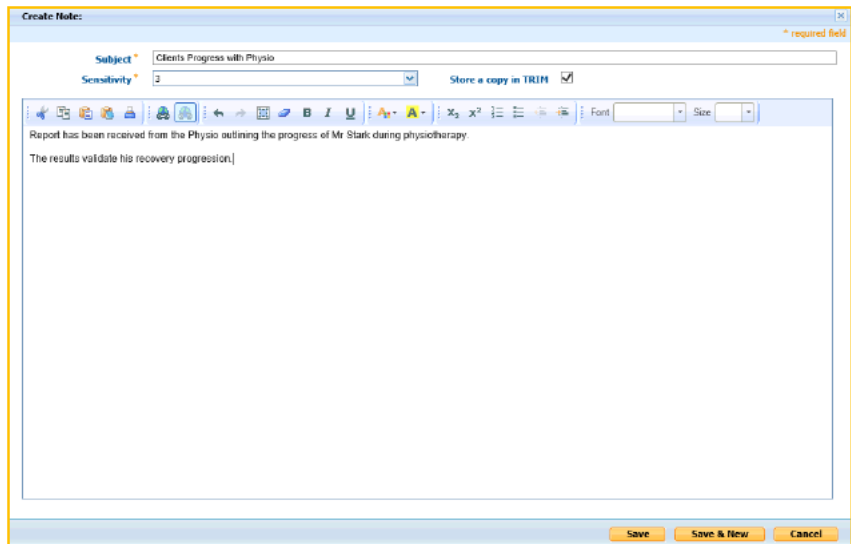
Change the **Sensitivity** to 3 or 4.

If required, tick **Store a copy in TRIM** box.



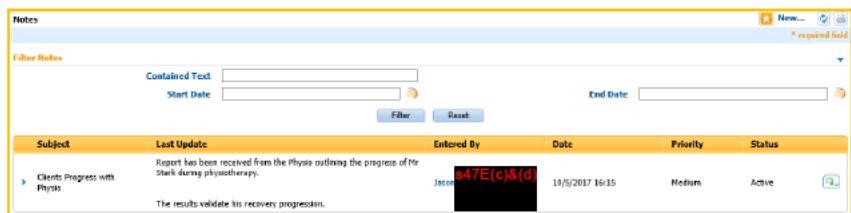
3. Enter detailed content for the note.

Click **Save**.



4. Confirm the new note appears correctly.

*NOTE: The date will be missing on a corrupted note and the note will require [fixing](#).*



- 5. Click the blue arrow ( ▶ ) to view more information on the Note.

Subject	Last Update	Entered By	Date	Priority	Status
Clients Progress with Physio	Report has been received from the Physio outlining the progress of Mr Stark during physiotherapy. The results validate his recovery progression.	Jason S47E(C)&(D)	10/5/2017 16:15	Medium	Active

**Subject** Clients Progress with Physio

**Details**

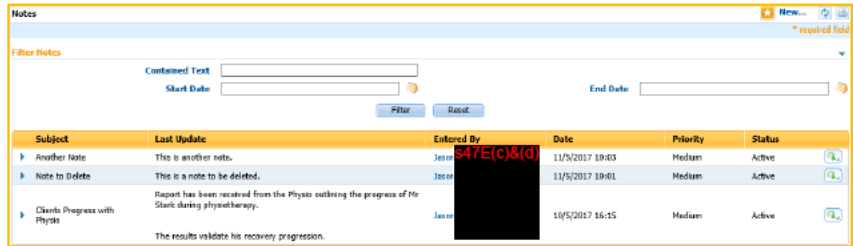
Entered By	Jason S47E(C)&(D)	Creation Date	10/5/2017 16:15
Sensitivity	3	Status	Active

**Notes History**

Jason Paik On: 10/5/2017 16:15  
Report has been received from the Physio outlining the progress of Mr Stark during physiotherapy.  
The results validate his recovery progression.

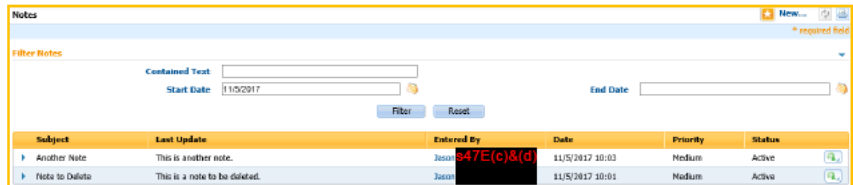
# SEARCH FOR A NOTE

1. Click the **Notes** tab.



2. **Method 1**  
Enter a **Start Date** and/or **End Date** to filter by date.

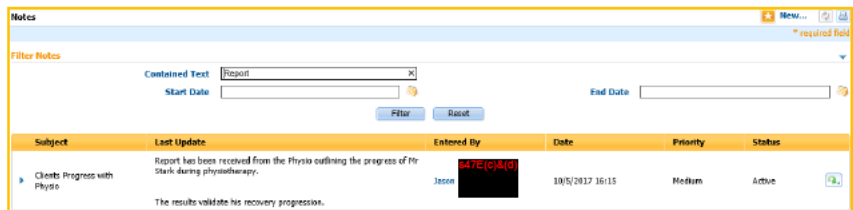
Click **Filter**.



3. **Method 2**  
Another option is to search using the **Contained Text** field.

Enter **search criteria**.

Click **Filter**.

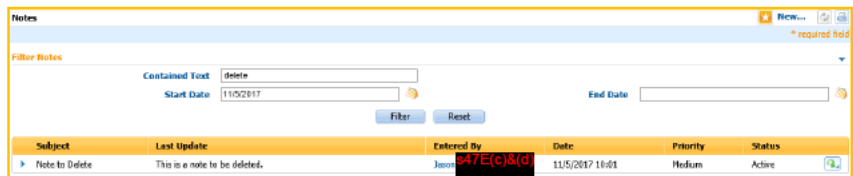


*NOTE: This will only search on the main body of the note. I.e. Last Update column.*

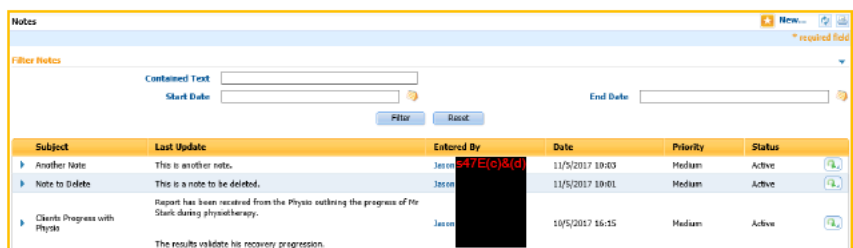
4. **Method 3**  
Search criteria can be combined to further narrow results.

Enter **Contained Text**.

Enter **Date/s**.



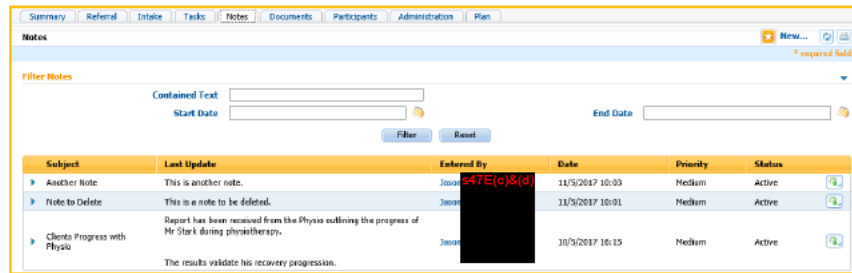
5. Click the **Reset** button, to clear the filter.






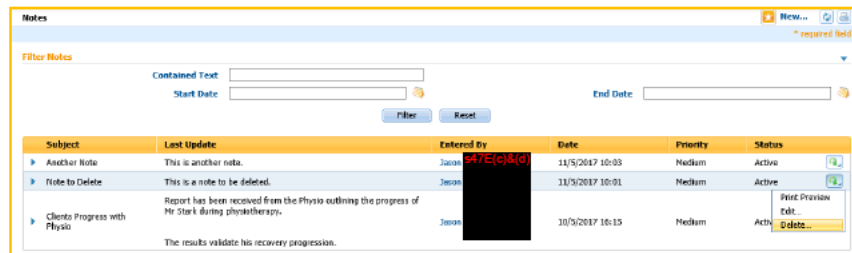
# DELETE A NOTE

1. Click the **Notes** tab.



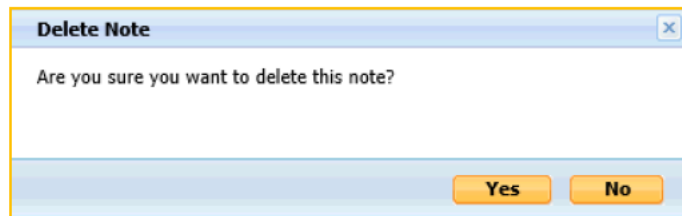
2. Click the **Action** button (  ) next to the note that requires deleting.

Click **Delete...**



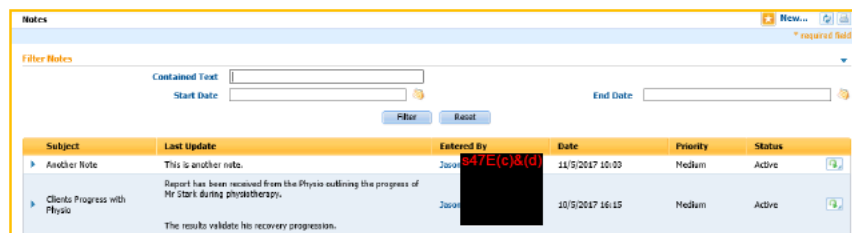
3. Click **Yes**.

*NOTE: Only Supervisors can perform a delete.*



4. **Confirm** the deleted note does not appear anymore.

*NOTE: At this stage the note may still appear on the Summary screen if it is one of the five most recent notes.*



## FIX CORRUPT NOTES

Corrupt notes occur when certain characters are pasted into the Note Text field of the Note.

1. Click the **Notes** tab.

Subject	Last Update	Entered By	Date	Priority	Status
This is a note	This is the comments for a note.	S47E(c)&(d)	11/8/2017 09:27	Medium	Active
This is a "test" to determine if double quotes (") are replaced by single (') quotes. - Typed in manually not pasted from word.	This is a "test" to determine if double quotes (") are replaced by single (') quotes.	S47E(c)&(d)	31/7/2017 15:49	Medium	Active
Another Note	This is another note.	S47E(c)&(d)	11/5/2017 10:03	Medium	Active
Clients Progress with Physio	Report has been received from the Physio outlining the progress of Mr Stark during physiotherapy.	S47E(c)&(d)	10/5/2017 16:15	Medium	Active
Corrupt Note Test	The results validate his recovery progression.	S47E(c)&(d)		Medium	Active

2. Click the **Date** column header.

NOTE: Corrupt Notes do not have *Last Update* and *Date* details. This step will sort all corrupt notes to the top of the list.

Subject	Last Update	Entered By	Date	Priority	Status
Corrupt Note Test		S47E(c)&(d)		Medium	Active
Clients Progress with Physio	The results validate his recovery progression.	S47E(c)&(d)	10/5/2017 16:15	Medium	Active
Another Note	This is another note.	S47E(c)&(d)	11/5/2017 10:03	Medium	Active
This is a "test" to determine if double quotes (") are replaced by single (') quotes. - Typed in manually not pasted from word.	This is a "test" to determine if double quotes (") are replaced by single (') quotes.	S47E(c)&(d)	31/7/2017 15:49	Medium	Active
This is a note	This is the comments for a note.	S47E(c)&(d)	11/8/2017 09:27	Medium	Active

3. Click the **Action** button > **Edit**.

Subject	Last Update	Entered By	Date	Priority	Status
Corrupt Note Test		S47E(c)&(d)		Medium	Active

<div style="text-align: right;"> <a href="#">Print Preview</a>  <a href="#">Edit</a>  <a href="#">Delete...</a> </div>					
<div style="text-align: center;"> <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Physically Delete...</a>   <a href="#">Close</a> </div>					
<b>Subject</b> Subject: Corrupt Note Test					
<b>Details</b> Entered By: Jason S47E(c)&(d)      Creation Date: 13/9/2017 11:00 Sensitivity: 1      Status: Active					
<b>Notes History</b>					
<div style="text-align: center;"> <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Physically Delete...</a>   <a href="#">Close</a> </div>					

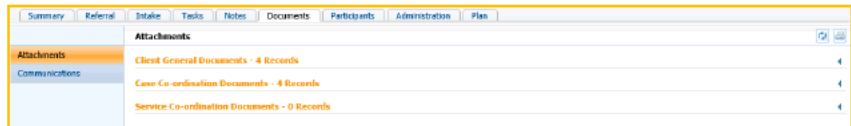
# DOCUMENTS

Two screens are included in the *Documents* tab:

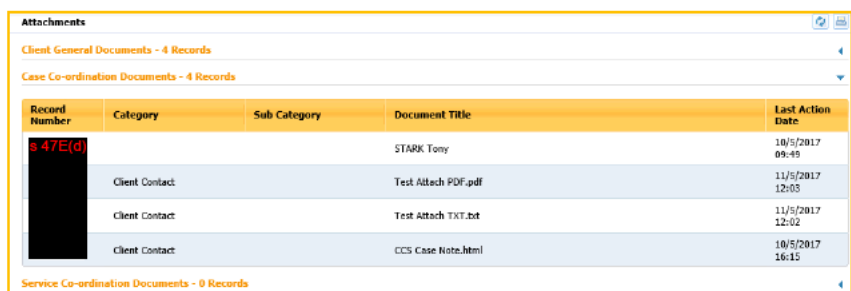
1. **Attachments** – Displays all documents stored in TRIM against a variety of containers pertaining to the client.
2. **Communications** – Allows the recording of information to and from the client, usually over the phone or by letter.

## VIEW TRIM DOCUMENTS

1. Click the **Documents** tab.

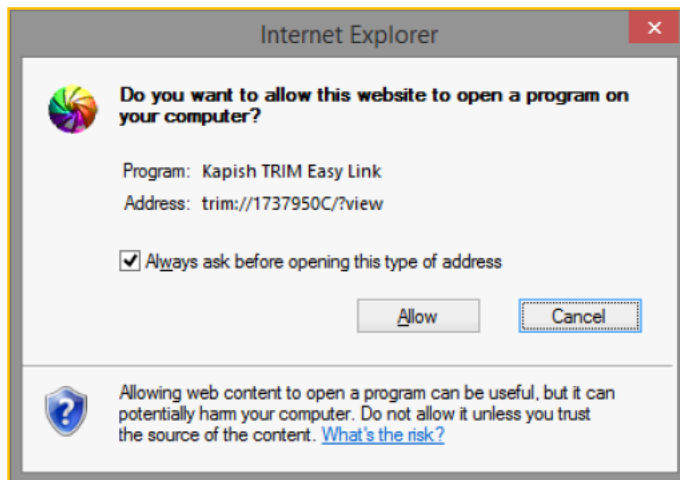


2. Click the **blue arrow** ( ▾ ) to expand each cluster revealing the contents of the TRIM container.



3. Click the **Record Number** hyperlink to open a document.

Click **Allow**.



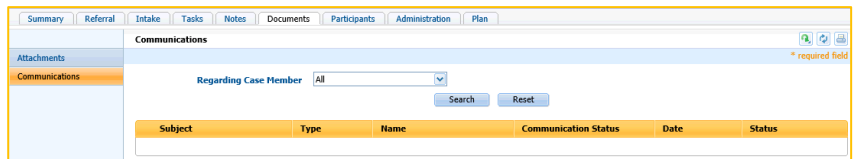
4. **View** document.



# ADD A COMMUNICATION

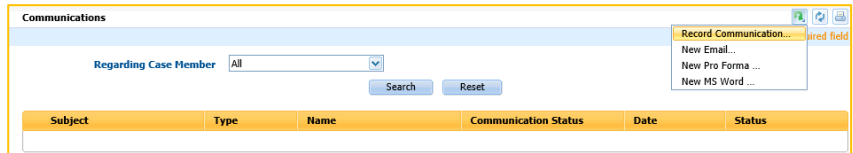
1. Click the **Documents** tab.

Click **Communications**.



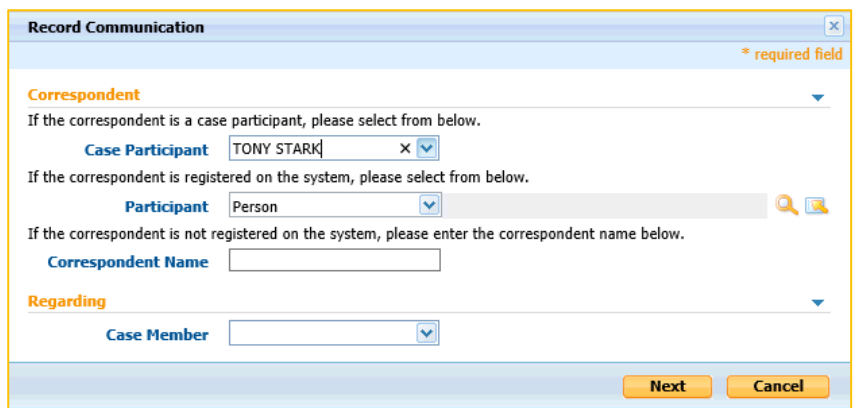
2. Click the **Action** (📎) button.

Select **Record Communication...**



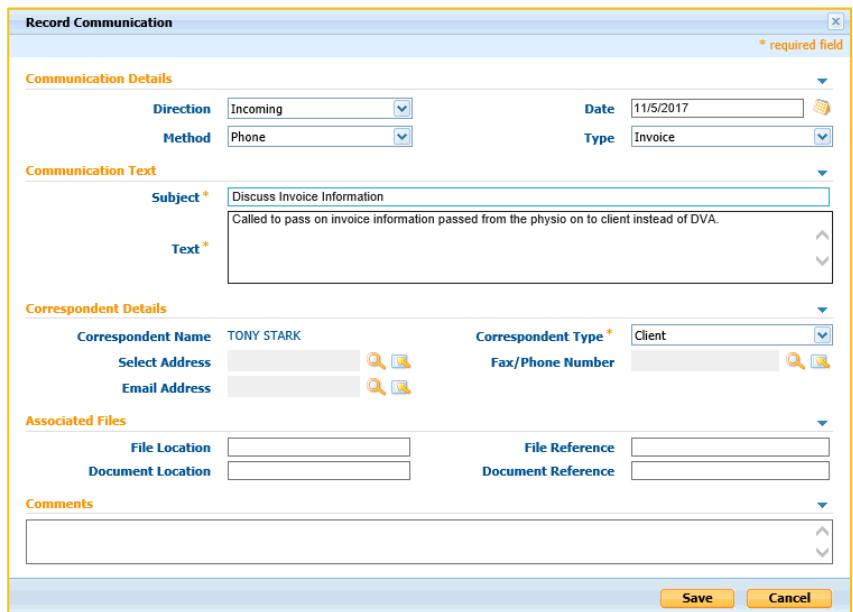
3. Select a **Case Participant**.

Click **Next**.

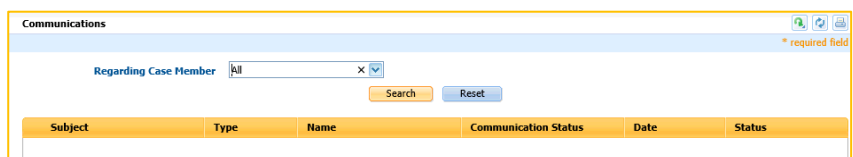


4. **Enter** communication details as required.

Click **Save**.



5. Click **Search**.



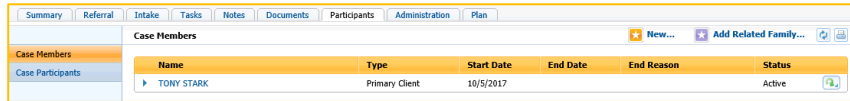
- Click the blue arrow ( ▶ ) to view more information.

Subject	Type	Name	Communication Status	Date	Status
Discuss Invoice Information	Recorded	TONY STARK	Received	11/5/2017	Active
<b>Communication Details</b>					
<b>Method</b>	Phone		<b>Communication Status</b>	Received	
<b>Communication Date</b>	11/5/2017		<b>Communication Type</b>	Invoice	
<b>Status</b>	Active		<b>Recorded By</b>	CPURJ	
<b>Record Date</b>	11/5/2017 14:59				
<b>Communication Text</b>					
<b>Subject</b>	Discuss Invoice Information				
<b>Communication Text</b>	Called to pass on invoice information passed from the physio on to client instead of DVA.				
<b>Correspondent Details</b>					
<b>Correspondent Name</b>	TONY STARK		<b>Correspondent Type</b>	Client	
<b>Address</b>					
<b>Email</b>					
<b>Phone Number</b>					
<b>Associated Files</b>					
<b>File Location</b>				<b>File Reference</b>	
<b>Document Location</b>				<b>Document Reference</b>	
<b>Comments</b>					
<b>Attachments</b>					
<b>Date</b>	<b>TRIM Reference</b>	<b>Description</b>			

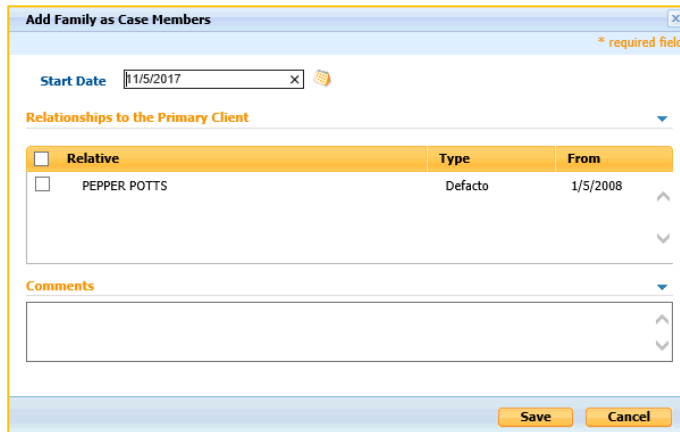
# PARTICIPANTS

## ADD CASE MEMBERS (SERVICE COORDINATION)

1. Click the **Participants** tab.

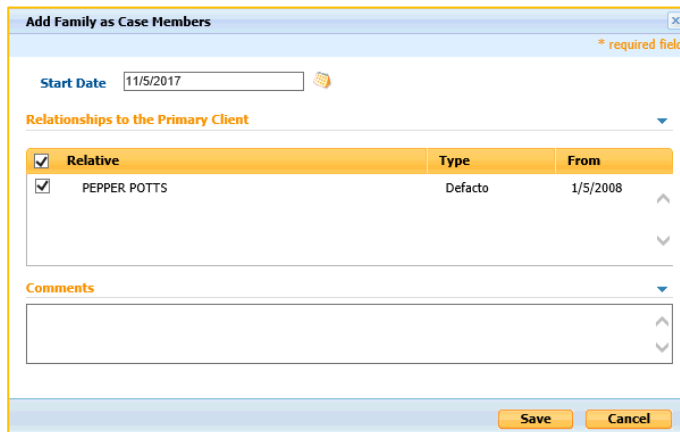


2. Click **Add Related Family...**



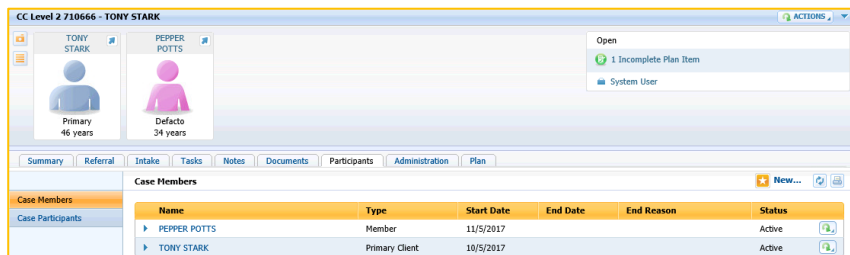
3. **Tick** required family members to add to a client’s case.

Click **Save**.



4. **Confirm** the family member appears as an icon in the header and also under *Case Members*.

*NOTE: The Add Related Family... button will not appear if there are no family members to add from the clients’ person record.*



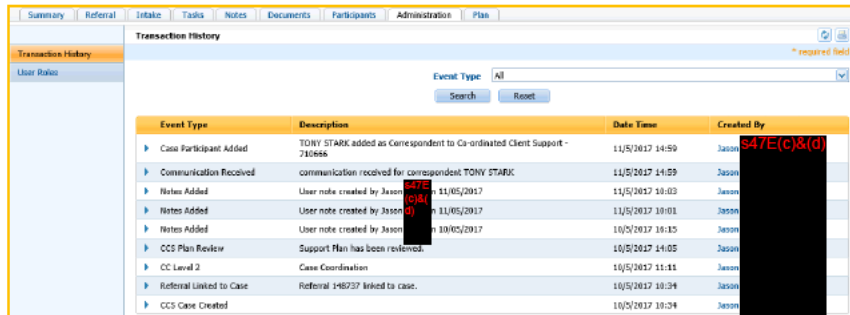
# ADMINISTRATION

**Transaction History** – Displays historical information regarding key changes to the CCS case. Such as Case Status, Notes, Tasks and User Roles. User information is recorded against each of these transactions, and include a date/time stamp.

**User Roles** – To set which users can administer the CCS case. Both Case Owner and Supervisor roles are set here.

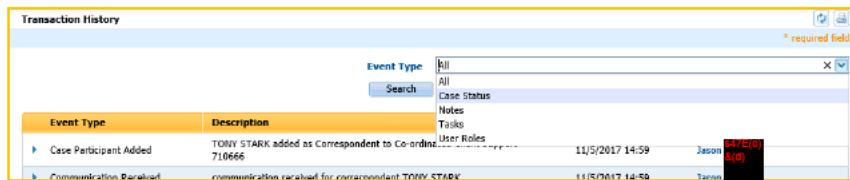
## FILTER TRANSACTION HISTORY

1. Click the **Administration** tab.



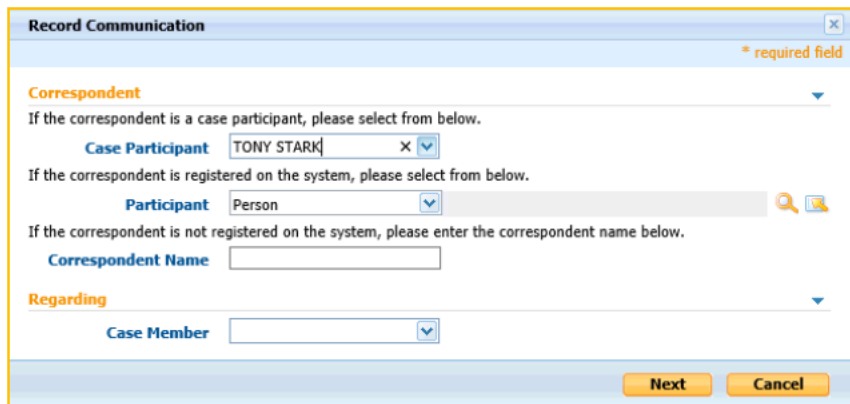
2. Click **Event Type**.

Select a **type**.



3. Select a **Case Participant**.

Click **Next**.



4. Enter communication details as required.

Click **Save**.

5. Click **Search**.

Subject	Type	Name	Communication Status	Date	Status
Discuss Invoice Information	Recorded	TONY STARK	Received	11/5/2017	Active

6. Click the blue arrow ( ▶ ) to view more information.

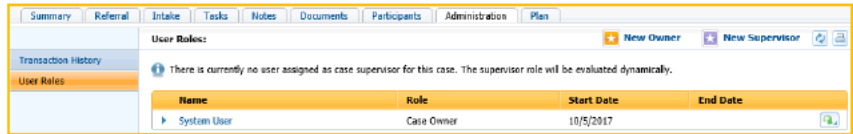


# CHANGE CASE OWNER

1. Click the **Administration** tab.

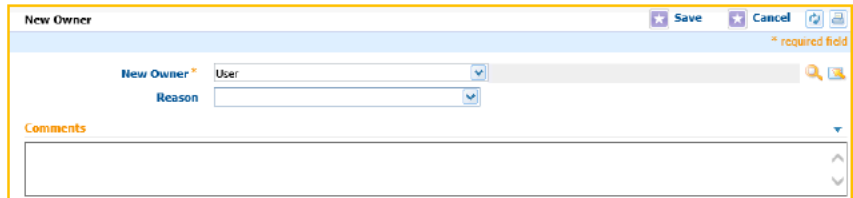
Click **User Roles**.

Click **New Owner**.



2. Ensure **New Owner** is set to *User*.

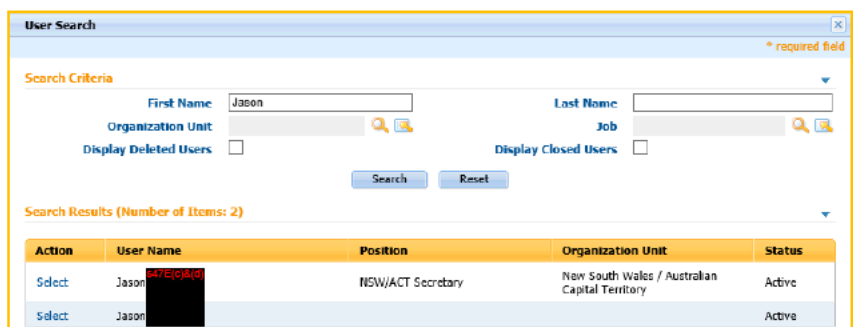
Click **search** (🔍) next to *New Owner*.



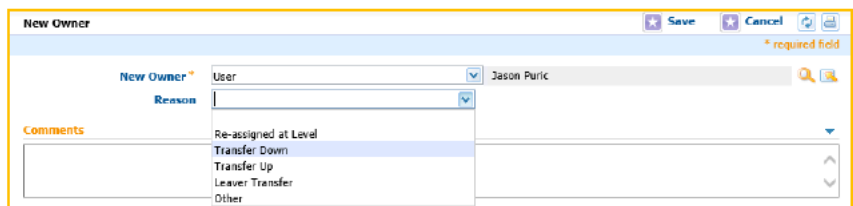
3. Enter a **First Name** or **Last Name**.

Click **Search**.

Click **Select** next to a user.

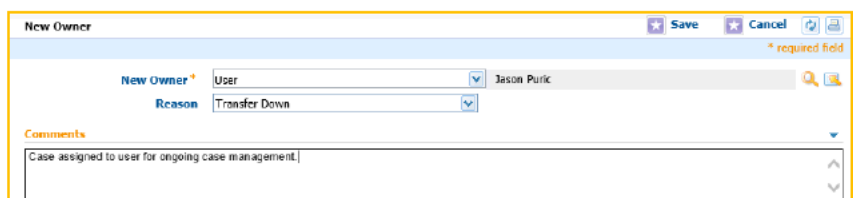


4. Select a **Reason**.



5. Enter **Comments** as required.

Click **Save**.



6. **Confirm** that the case owner in the case header has now changed.

New owner has also been added to the *User Roles* screen.



## ADD A SUPERVISOR

1. Click the **Administration** tab.

Click **User Roles**.

Click **New Supervisor**.

2. Click **search** (🔍) next to *New Supervisor*.

3. Enter a **First Name** or **Last Name**.

Click **Search**.

Click **Select** next to a user.

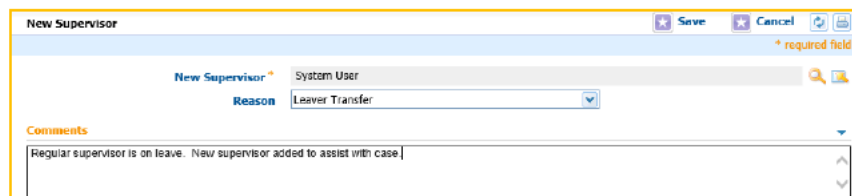
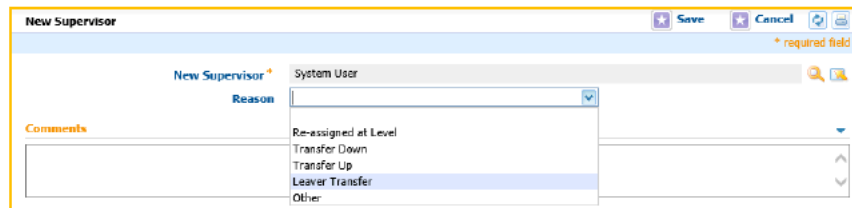
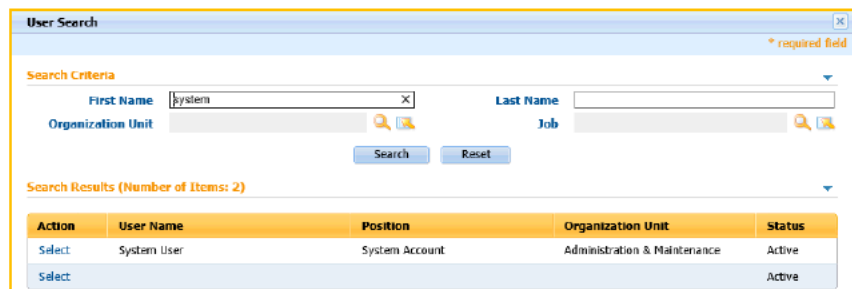
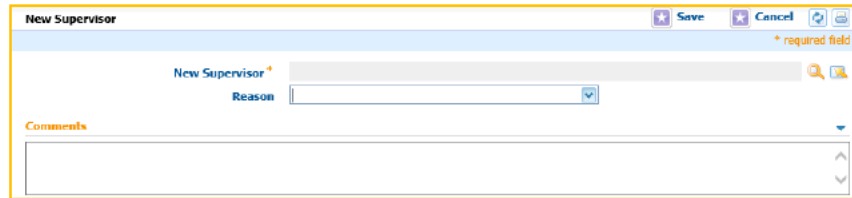
4. Select a **Reason**.

5. Enter **Comments** as required.

Click **Save**.

6. **Confirm** that the new supervisor has been added.

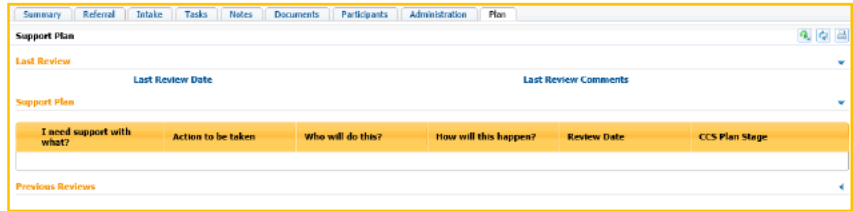
*NOTE: The supervisor is no longer determined dynamically by the system as stated in Step 1.*



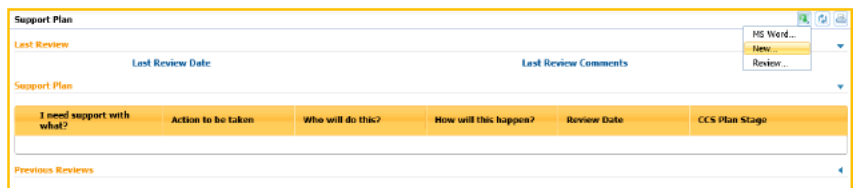
# PLAN

## ADD A PLAN ITEM

4. Click the **Plan** tab.

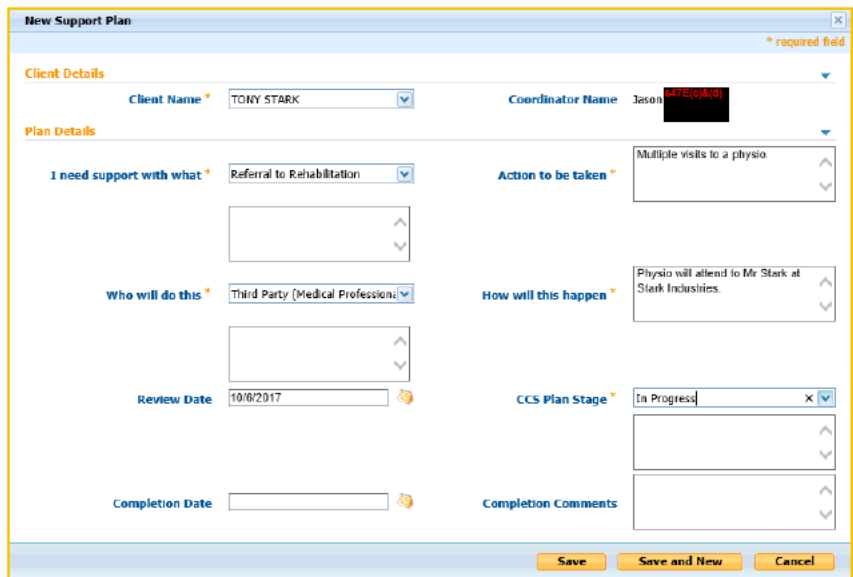


5. Click the **Action** (📄) button.  
Select **New....**

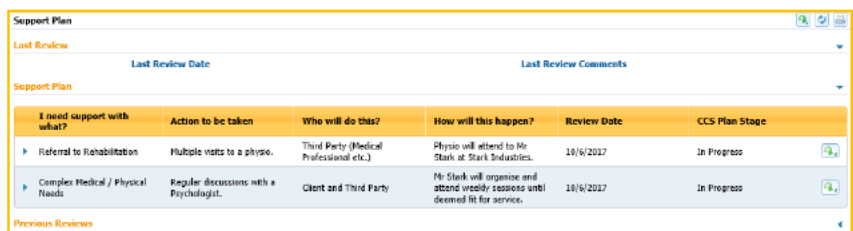


6. Complete **Plan Details** as required.  
Click **Save**.

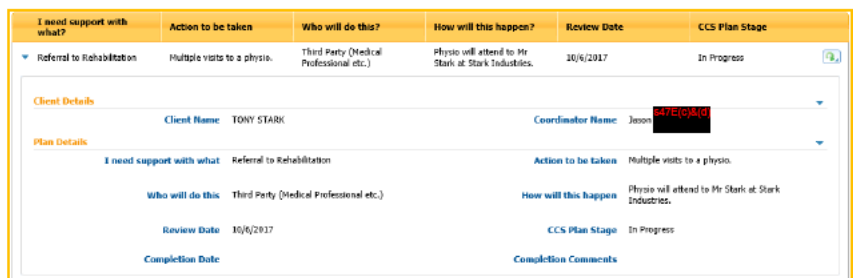
*TIP: Clicking Save and New will allow multiple plan items to be created.*



7. Confirm **Plan Items** appear under the *Support Plan*.

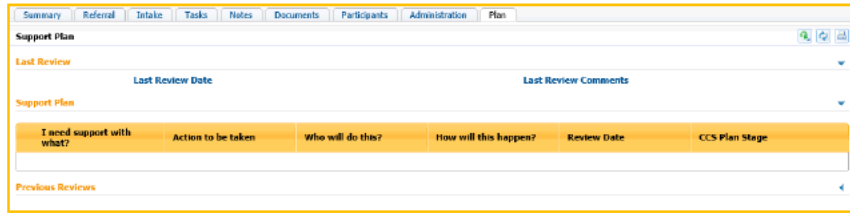


8. Click the blue arrow (▶) to view more information on the Plan Item.



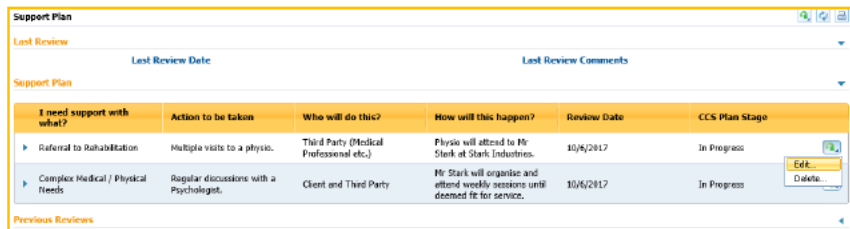
# COMPLETE A PLAN ITEM

1. Click the **Plan** tab.

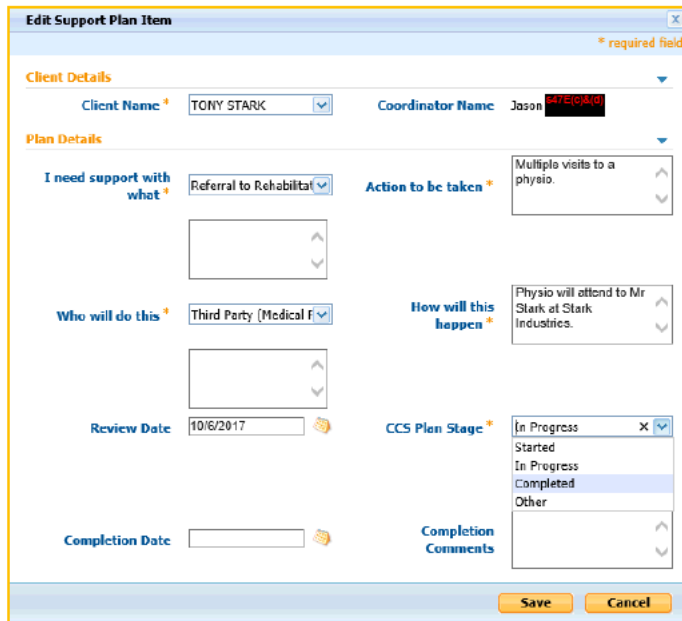


2. Click the **Action** (📄) button next to a Plan Item.

Select **Edit...**



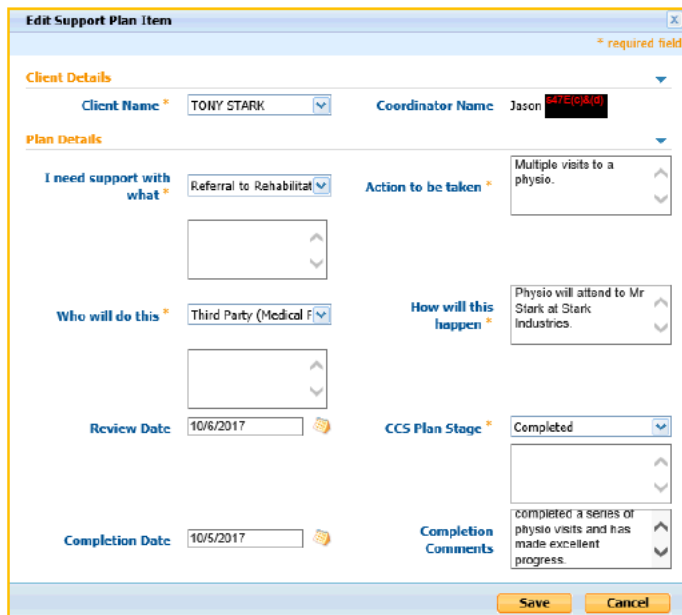
3. Change *CCS Plan Stage* to **Completed** status.



4. Enter a **Completion Date**.

Enter any relevant **Completion Comments**.

Click **Save**.



5. Confirm that the *CCS Plan Stage* has changed to *Completed*.

Support Plan					
I need support with what?	Action to be taken	Who will do this?	How will this happen?	Review Date	CCS Plan Stage
Complex Medical / Physical Needs	Regular discussions with a Psychologist.	Client and Third Party	Mr Stark will organise and attend weekly sessions until deemed fit for service.	10/6/2017	In Progress
Referral to Rehabilitation	Multiple visits to a physio.	Third Party (Medical Professional etc.)	Physio will attend to Mr Stark at Stark Industries.	10/6/2017	Completed

6. Click the blue arrow ( ▶ ) to view more information on the Plan Item.

Support Plan					
I need support with what?	Action to be taken	Who will do this?	How will this happen?	Review Date	CCS Plan Stage
Complex Medical / Physical Needs	Regular discussions with a Psychologist.	Client and Third Party	Mr Stark will organise and attend weekly sessions until deemed fit for service.	10/6/2017	In Progress
Referral to Rehabilitation	Multiple visits to a physio.	Third Party (Medical Professional etc.)	Physio will attend to Mr Stark at Stark Industries.	10/6/2017	Completed

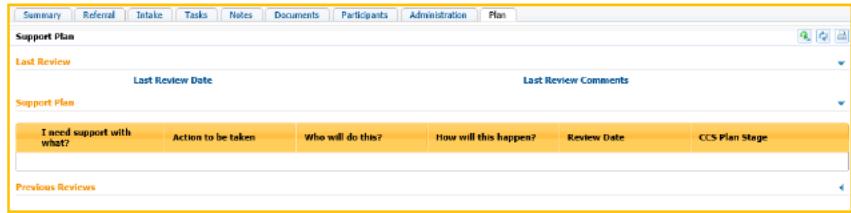
Client Details	
Client Name	TONY STARK
Coordinator Name	Jessie [REDACTED]

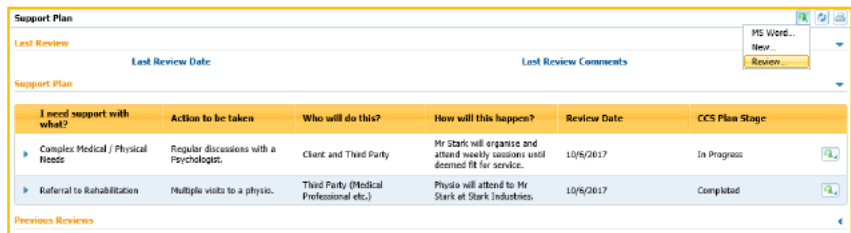
Plan Details	
I need support with what	Referral to Rehabilitation
Action to be taken	Multiple visits to a physio.
Who will do this	Third Party (Medical Professional etc.)
How will this happen	Physio will attend to Mr Stark at Stark Industries.
Review Date	10/6/2017
CCS Plan Stage	Completed
Completion Date	10/9/2017
Completion Comments	Mr Stark has completed a series of physio visits and has made excellent progress.

# REVIEW A SUPPORT PLAN

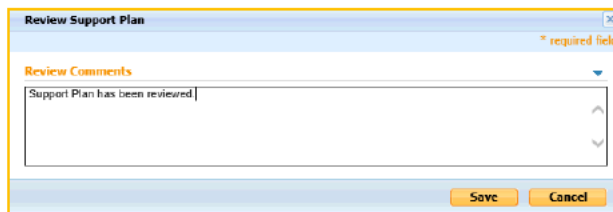
1. Click the **Plan** tab.



2. Click the **Action** (🔗) button.  
Select **Review...**



3. Enter review information into the **Review Comments**.  
Click **Save**.



4. Confirm **Last Review Date** and **Last Review Comments** appear.



5. Click the blue arrow (▾) under **Previous Reviews**.



*TIP: This displays a history of reviews made against the Support Plan.*

## FAQ'S

### How do I clear all completed fields in the Create Referral form and start again?

Clicking the *Reset* button on the referral form will clear all information already entered allowing the user to start again fresh.



Figure 3 - Create Referral Form Reset Button

### I don't have a file number for the Create Referral form or the client does not exist when entering a file number. What do I do?

All client information can be entered in manually. When the time comes to create a case, the Intake Officer manually searches for the correct client in aDVance and processes the referral against that client in order to create a CCS case.

### I've processed a referral against the wrong client, how do I fix this?

This can be corrected by reprocessing the same referral against the correct client. By searching for the referral, clicking the action button and selecting *Process...* again, then selecting the correct client.

### When I view a referral with an attachment, the TRIM reference is missing.

The TRIM reference number will not appear until a referral has been processed and attached to a CCS case. The system then sends the attachment to the clients TRIM container. When viewing the referral again, a Trim reference will appear allowing the user to open the attachment, stored in Trim, directly from the CCS case.

### My access seems to be preventing me from doing things I used to be able to do in the old system.

Users have been changed for the new CCS module as requested by the business prior to implementation. In some cases a user's access may not have been setup properly. Users that have multiple positions may find their access conflicts causing some functions to not work properly. E.g. A user may have the DUNT Coordinator and DUNT Supervisor positions.

### I set the Referral Outcome to Declined and the case has now closed. I need to change the outcome and reopen the case.

By simply changing the *Referral Outcome* and removing the *Decline Reason* and *Declined Details*, the case will change to the appropriate classification and automatically reopen the case.

### I can't seem to delete a note in a case.

Only CCS Supervisors and Admin staff have access to delete notes in a CCS case.

### What's the difference between *Delete* and *Physically Delete* in the notes screen?

*Delete* will remove the note from the front end and is good if the user has recorded the note incorrectly. *Physically Delete* will remove the note from the front end and back end of the system. This is for instances where privacy is of the utmost importance and could cause detriment to a client. This action can only be performed by administrators.

### Why can't I see the *Add Related Family* button under *Participants > Case Members*?

No family members have been added to the clients Person Record in aDVance or they have all been added to the CCS Case already.

### When I close a case, do I need to close the referral too?

When a case is closed in CCS either manually or by aDVance, the referral is automatically closed.

**I've created a case for the wrong client, how do I reassign**

CCS Supervisors now have the ability to “relink” incorrectly assigned CCS cases to the correct client. The option can be found in the My Referrals (CCS) screen.



## RELEASE NOTES

Change	Release	Date
<p><b>General</b></p> <ul style="list-style-type: none"> <li>Final fixes for Important Information. Important Information should now be automatically created and removed based on case status and referral outcome. Messages displayed in aDVance and VIEW now reflect the correct CCS case (i.e. CLU, CC, SC) and corresponding contact details.</li> </ul>	46	16/03/2018
<p><b>General</b></p> <ul style="list-style-type: none"> <li>The trigger point has changed that auto generates Important Information displayed in aDVance and VIEW. This will occur each time a case is assessed instead of on case creation.</li> </ul> <p><b>Reporting</b></p> <ul style="list-style-type: none"> <li>BIRT Report changes to the CCS Level Assessment Report</li> </ul>	45	1/12/2017
<p><b>General</b></p> <ul style="list-style-type: none"> <li>Important Information will now display the CCS case owners' first name and extension only to preserve confidentiality of the coordinator. This will appear in both VIEW and aDVance.</li> <li>VIEW will now automatically display 'Important Information' for clients that have a CCS case. When a client is no longer supported through CCS the Important Information message will be removed automatically.</li> </ul> <p><b>Intake</b></p> <ul style="list-style-type: none"> <li>Clicking the <i>Intake</i> tab, within an existing case, will automatically display the <i>Assessments</i> screen.</li> </ul> <p><b>Referral Form</b></p> <ul style="list-style-type: none"> <li>The Referrer field will now display as <i>Referrer (First Name &amp; Surname)</i> which should reduce the amount of ambiguous entries and improve data quality for reporting.</li> <li>Referrer Role and Business Area field is now a drop down box, allowing users to select their relevant area and improve data integrity.</li> </ul> <p><b>User Roles</b></p> <ul style="list-style-type: none"> <li>Users will no longer get an error message when attempting to edit user roles.</li> </ul> <p><b>Assessments</b></p> <ul style="list-style-type: none"> <li>The <i>Date Completed</i> field will now automatically select "Today's" date when a Referral Outcome has been added/changed.</li> </ul> <p><b>My Referrals (CCS)</b></p> <ul style="list-style-type: none"> <li><i>Case Owner</i> column has been added to the <i>Search Results</i>, displaying the current owner.</li> <li><i>Current Outcome</i> column has been added to the <i>Search Results</i>, displaying the assessment <i>Referral Outcome</i>.</li> <li><i>Surname</i> search field is now renamed to <i>Last Name</i>.</li> <li>Search Results will now display in descending order, showing the newest referrals first.</li> <li>Supervisors can now relink cases that were created against an incorrect client, to the correct client. All case details except for TRIM documents and Family &amp; Support information will be transferred to the new client.</li> </ul> <p><b>Reporting</b></p> <ul style="list-style-type: none"> <li>CCS Demographic Report</li> <li>CCS Plan Items Report</li> <li>CCS Progression Report</li> </ul>	44	2/09/2017

<p><b>General</b></p> <ul style="list-style-type: none"> <li>Reduced the time it takes for a CCS case to load/open for the first time.</li> <li>When assessing a referral, the new CCS case will now be automatically assigned to the System. This will streamline the process for supervisors when assigning cases to coordinators.</li> </ul> <p><b>Family and Support</b></p> <ul style="list-style-type: none"> <li>Added <i>Save and New...</i> button to the Add Child function, allowing users to add multiple children more efficiently.</li> </ul> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li><i>Recent Plan Reviews</i>, <i>Recent Notes</i> and <i>Classification History</i> details will now be expanded/visible by default.</li> </ul> <p><b>Referral Form</b></p> <ul style="list-style-type: none"> <li>The Create Referral Form will now render correctly when Internet Explorer is in Compatibility Mode.</li> <li>Increase size of text areas in the Create Referral screen to 1500 characters.</li> <li>Added WA state option under <i>Client Details &gt; State Location!</i></li> </ul> <p><b>User Roles</b></p> <ul style="list-style-type: none"> <li>Changed the <i>Reason</i> options when selecting a new case owner to be more specific for Coordinated Client Support staff.</li> </ul> <p><b>Transaction History</b></p> <ul style="list-style-type: none"> <li>Added a custom filter allowing users to filter by Case Status, User Role, Notes or Tasks.</li> </ul> <p><b>Contacts [Documents]</b></p> <ul style="list-style-type: none"> <li>Contacts tab has been renamed to Documents.</li> </ul> <p><b>Support Plan</b></p> <ul style="list-style-type: none"> <li>Added a <i>Save and New</i> button to the <i>New Support Plan [Item]</i> screen, allowing users to add multiple plan items more efficiently.</li> <li>Fixed the naming protocol for a Support Plan when being uploaded into TRIM.</li> </ul> <p><b>Assessments</b></p> <ul style="list-style-type: none"> <li>The Assessment Summary field has been increased from a 500 character limit to 4000 characters.</li> </ul> <p><b>My Referrals (CCS)</b></p> <ul style="list-style-type: none"> <li>A Date Completed column has been added to the referral search indicating when/if a case has been assessed.</li> <li>Two new referral search pre-sets have been added.             <ul style="list-style-type: none"> <li><i>Processed Referrals with No Decisions</i> - Will display all processed referrals with a case that have not yet been classified.</li> <li><i>Processed Referrals Not Assigned</i> - Will display all referrals that have been assigned to a case, that are owned by the system (ACE5SVC ACE5SVC).</li> </ul> </li> </ul> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>Added a search filter to which allows users to search for keywords and date ranges.</li> <li>Added ability to store notes directly to TRIM from a CCS case.</li> <li>Users with Admin or Supervisor access now have the ability to delete case notes instead of just cancelling them.</li> </ul> <p><b>Attachments</b></p> <ul style="list-style-type: none"> <li>Fixed an issue where client TRIM documents were not displaying under the appropriate clusters. Removed visibility of TRIM files not specific to Coordinated Client Support.</li> </ul> <p><b>Reporting</b></p>	<p><b>43</b></p>	<p><b>10/06/2017</b></p>
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<ul style="list-style-type: none"><li>• Total Case Holding Report</li><li>• Exception Report</li><li>• Assessment Level Report</li><li>• Determination Referral Outcome Report</li></ul>		
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