

Gambler's Help  
Connect for  
Community  
Education Workers



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## 1 Summary

This document describes the procedures used by community education workers at Gambler's Help agencies to record cases, organisations and activities in *Gambler's Help Connect*.

### Scope

Gambler's Help Connect for Community Education Workers includes the following:

- ⚙ Key *Gambler's Help Connect* concepts for community education workers
- ⚙ Creating community education cases in *Gambler's Help Connect*
- ⚙ Recording community education activities in *Gambler's Help Connect*
- ⚙ Maintaining community education cases in *Gambler's Help Connect*.

### Who should read this document?

Gambler's Help Connect for Community Education Workers is intended for Gambler's Help community education workers.



## 2 Gambler's Help Connect for Community Education Workers

This section describes the procedures used by community education workers to record their activities in *Gambler's Help Connect*:

- ⚙ *Gambler's Help Connect* concepts for community education workers
- ⚙ Creating organisations and cases in *Gambler's Help Connect*
- ⚙ Recording activities
- ⚙ Managing cases.

The work you do as a community education worker is organised in *Gambler's Help Connect* Cases.

Every case has the following characteristics:

- ⚙ A primary, and optionally a secondary, community education worker has 'ownership' of the case
- ⚙ School and sporting club cases are associated with an organisation record for each school or club.
- ⚙ *Activities* record the work you do on each case.

Case records are visible in summary to everyone but you can only view or edit *details* of cases located at your agency.

### Types of cases

There are three community education case types:

- ⚙ **School:** for each of the schools where you conduct community education activities.
- ⚙ **Sporting club:** for each of the sporting clubs where you conduct community education activities.
- ⚙ **Service promotion:** service promotion cases differ from the other CE case types; they are not linked to a particular organisation but represent the sum total of your service promotion activities for your catchment.

### Organisations

Community education cases for schools or sporting clubs are associated with an *organisation* record for each club or school which your community education team has a relationship with.

Each organisation has a unique record. You associate organisation records with cases. The organisation record contains details including key personnel identities and contact details.

You can update organisation records in line with personnel or other changes. All organisation records are available to all *Gambler's Help Connect* users.



*Gambler's Help venue support workers also use organisation records for the gaming venues they work with. Since some sporting clubs also run gaming venues it is possible that the same organisation could be associated with both a community education AND a venue support case.*

### Activities

You record the work you do for cases in *activities*. Activities are always associated with a case. They record the type of work done, the staff and organisation involved and the time spent on it. Activities are organised in *Activity types*, *sub-types* and *sub-sub-types*. Not all activity types have sub-types.

The table below lists the activity types and sub-types you can record for school, sporting club and service promotion cases.

| Activity type                     | Activity sub type      | Activity sub sub type                                                                                                                                                       |
|-----------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>School activity</b>            | Education              | <ul style="list-style-type: none"> <li>• Parent Presentation</li> <li>• Student Presentation</li> <li>• Teacher Presentation</li> <li>• Feedback form data entry</li> </ul> |
|                                   | Promotion              | <ul style="list-style-type: none"> <li>• Meeting</li> <li>• Cold call</li> <li>• Email</li> </ul>                                                                           |
| <b>Service promotion activity</b> | Community event        | <ul style="list-style-type: none"> <li>• None</li> </ul>                                                                                                                    |
|                                   | Distributing materials | <ul style="list-style-type: none"> <li>• None</li> </ul>                                                                                                                    |

# Gambler's Help Connect for Community Education Workers

## GAMBLER'S HELP CONNECT FOR COMMUNITY EDUCATION WORKERS

| Activity type                 | Activity sub type        | Activity sub sub type                                                                                                                                                                                                                                                                             |
|-------------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | Social media marketing   | <ul style="list-style-type: none"> <li>None</li> </ul>                                                                                                                                                                                                                                            |
|                               | School related           | <ul style="list-style-type: none"> <li></li> </ul>                                                                                                                                                                                                                                                |
|                               | Sporting club related    | <ul style="list-style-type: none"> <li></li> </ul>                                                                                                                                                                                                                                                |
|                               | Other                    | <ul style="list-style-type: none"> <li>User defined</li> </ul>                                                                                                                                                                                                                                    |
| <b>Sporting club activity</b> | Education                | <ul style="list-style-type: none"> <li>Preparation for session</li> <li>Delivery of session – junior</li> <li>Delivery of session – senior female</li> <li>Delivery of session – senior male</li> <li>Delivery of session – senior female &amp; male</li> <li>Feedback form data entry</li> </ul> |
|                               | Ongoing Support & Advice | <ul style="list-style-type: none"> <li>Organisation visit</li> <li>Follow-up on charter implementation</li> </ul>                                                                                                                                                                                 |
|                               | Promotion                | <ul style="list-style-type: none"> <li>Charter champions training</li> <li>Meeting</li> <li>Planning</li> <li>Presentation (about the program)</li> <li>Themed activity</li> <li>Other</li> </ul>                                                                                                 |

### Some common terms

The table below defines some common *Gambler's Help Connect* terms.

| Navigation Option              | Definition                                                                                          |
|--------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Dashboards</b>              | View key statistics                                                                                 |
| <b>New Community Education</b> | Create a new community education case                                                               |
| <b>My Cases</b>                | View and access your assigned community education cases                                             |
| <b>My Activities</b>           | Your pending (or overdue) activities                                                                |
| <b>Cases</b>                   | Search cases from your agency                                                                       |
| <b>Organisations</b>           | Search for an organisation                                                                          |
| <b>Activities</b>              | Displays all your activities, most recent at the top. You can search particular activities here too |
| <b>Documents</b>               | View documents attached to cases or activities                                                      |

### 3 Creating cases

This section describes the procedures you follow to create community education cases in *Gambler's Help Connect*. When a community education case is linked to a specific organisation – a school or sporting club, you will need to create or edit the organisation record associated with that case. When the case is for service promotion, no specific organisation is associated with the case in *Gambler's Help Connect*.

### Community education cases for schools or sporting clubs

When you create a new community education case for a school or sporting club you might need to create an organisation record for the school or club. If the school or sporting club is already recorded in *Gambler's Help Connect* you can run a search for the organisation record and start a new case. If the organisation is not recorded in *Gambler's Help Connect* you will need to create the organisation record before starting the new case.

#### Creating a new organisation record for a school

- 1 From the **Search** menu select **Organisations**.  
The **Organisations** list displays.
- 2 In the search field enter your search term and then click **Search**.  
Organisations matching your search terms display in the list.
- 3 When you are satisfied there is no organisation record for the school click **Add organisation**.  
The **Organisation Details** page displays.

- 4 In the **Name** field, enter the name of the school.

- 5 In the **Organisation Type** field  select **School**.  
The **School Contacts** section of the page expands to display extra fields relating to a school record.

### Organisation Details

Name \*

Joan Kennett Senior Secondary College

Organisation Type

School

Organisation Category

Government

### Address

Address Line 1

32 Bogong Views

Address Line 2

Search Postcode/Suburb

Please enter postcode/suburb

Suburb

Tamboritha

Postcode

3858

State

VIC

Main phone number

53894658

### ▼ School Contacts

Contact Name

Claude Langoustine

Job Title

Principal

Phone Number

53894658

Mobile Number

0431999885

Email

ClaudeL@JKSSC.vic.gov.au

Program Awareness

yes

### > Sporting Club Contacts

### > Venue Contacts

Save

Save and Close

Cancel

- 6 In the **Organisation Category** field  select the category.
- 7 Enter the address details in the relevant fields.



In the **Search Postcode/Suburb** field enter the first few letters of the name of the suburb or town, or the postcode, and the field returns a list of matching locations.

- 8 In the **School Contacts** section enter the contact details in the relevant fields.



*If there is more than one contact, you can enter the details in the **Notes** section of the case record.*

- 9 Click .  
*The Organisations list displays with your new organisation displayed at the top of the list ready for you to start the new case.*

### Creating a new organisation record for a sporting club

- 1 From the **Search** menu select **Organisations**.  
*The **Organisations** list displays.*
- 2 In the search field enter your search term and then click .  
*Organisations matching your search terms display in the list.*
- 3 When you are satisfied there is no organisation record for the sporting club click .  
*The **Organisation Details** page displays.*
- 4 In the **Name** field, enter the name of the sporting club.
- 5 In the **Organisation Type** field  select **Sporting Club**.  
*The **Sporting Club Contacts** section of the page expands to display extra fields relating to a sporting club record.*

### Organisation Details

|                       |                   |                       |
|-----------------------|-------------------|-----------------------|
| Name *                | Organisation Type | Organisation Category |
| Ouyen Ice Hockey Club | Sporting Club     | Ice Hockey            |

### Address

|                              |                |       |
|------------------------------|----------------|-------|
| Address Line 1               | Address Line 2 |       |
| 36 Nhill St                  |                |       |
| Search Postcode/Suburb       |                |       |
| Please enter postcode/suburb |                |       |
| Suburb                       | Postcode       | State |
| Ouyen                        | 3490           | VIC   |
| Main phone number            |                |       |
| 056985987                    |                |       |

### > School Contacts

### ▼ Sporting Club Contacts

|                               |                                      |                                                                         |                      |
|-------------------------------|--------------------------------------|-------------------------------------------------------------------------|----------------------|
| Governing Body                | No. of Players                       | Player age range                                                        | Number of Supporters |
| AIHA                          | 50-100                               | <div>&lt;18 x 18-24 x</div> <div>25-39 x 40-59 x</div> <div>60+ x</div> | 500                  |
| Communication with Members    |                                      | Receives sponsorship from sportsbetting company?                        |                      |
| Email x Facebook x Team App x |                                      | No                                                                      |                      |
| Owns and operates EGMs?       | Responsible gambling charter signed? | Program Awareness                                                       |                      |
| No                            | No                                   | Community educator x                                                    |                      |
| Contact Name                  | Job Title                            | Phone Number                                                            | Mobile Number        |
| Clive O'Vindia                | Honorary Secretary                   |                                                                         | 0314565989           |
| Email                         |                                      |                                                                         |                      |
| clive@hothockey.com           |                                      |                                                                         |                      |
| Charter Champion One          | Name                                 | Job Title                                                               |                      |
| Charter Champion Two          | Name                                 | Job Title                                                               |                      |

### > Venue Contacts

- In the **Organisation Category** field  select the category.



*If the sport isn't on the category list select **Other**. When you do this a free text field displays in which you can enter the sport.*

- Enter the address details in the relevant fields.



*In the **Search Postcode/Suburb** field enter the first few letters of the name of the suburb or town, or the postcode, and the field returns a list of matching locations.*

- In the **Sporting Club Contacts** section enter the contact details in the relevant fields.

- Click .

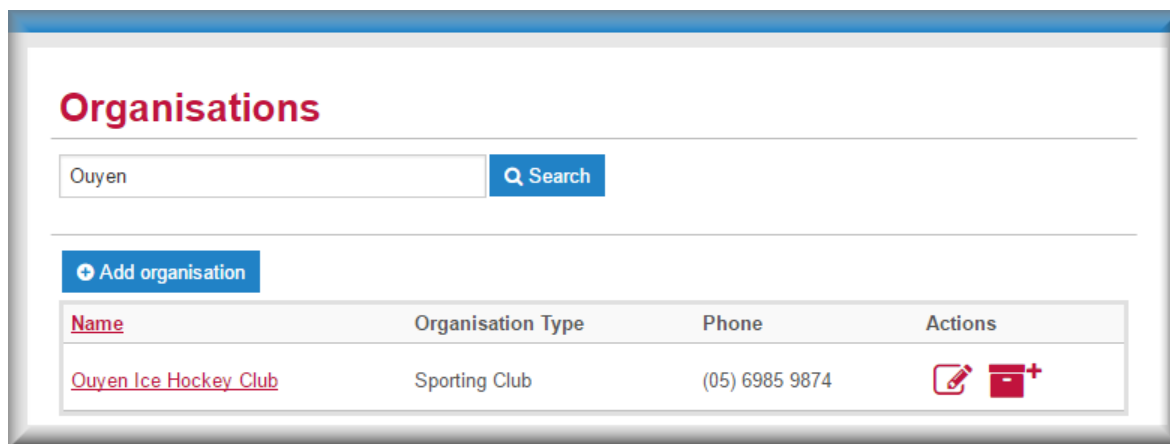
*The Organisations list displays with your new organisation displayed at the top of the list ready for you to start the new case.*

## Creating a community education case for a school or sporting club

You start with an organisation search:

- From the **Search** menu select **Organisations**.  
*The **Organisations** list displays.*
- In the search field enter your search term and then click .

*Organisations matching your search terms display in the list.*



| Name                                  | Organisation Type | Phone          | Actions                                                                                                                                                                     |
|---------------------------------------|-------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Ouyen Ice Hockey Club</a> | Sporting Club     | (05) 6985 9874 |   |

- Click the [Name link](#) for the organisation for which you want to create a new community education case.  
*The organisation record displays in view mode.*

**Ouyen Ice Hockey Club**

Details Cases Activities Change Log

**Summary**

Organisation Type: Sporting Club  
Main phone: (05) 6985 9874

Organisation Category: Ice Hockey

Venue Support [+As Venue](#)  
Community Education [+As Organisation](#)

**Address**

36 Nhill St  
Ouyen  
VIC  
3490

Community Education [+As Organisation](#)

**Sporting Club Contacts**

|                             |                                  |                                                   |                    |
|-----------------------------|----------------------------------|---------------------------------------------------|--------------------|
| Governing Body:             | AIHA                             | No. of Players:                                   | 50-100             |
| Player age range:           | <18, 18-24, 25-39, 40-59 and 60+ | Number of Supporters:                             | 500                |
| Communication with Members: | Email, Facebook and Team App     | Receives sponsorship from sportsbetting company?: | No                 |
| Owns and operates EGMs?:    | No                               | Responsible gambling charter signed?:             | No                 |
| Program Awareness:          | Community educator               |                                                   |                    |
| Contact Name:               | Clive O'Vindia                   | Job Title:                                        | Honorary Secretary |
| Mobile Number:              | (03) 1456 5989                   |                                                   |                    |
| Email:                      | clive@hothockey.com              |                                                   |                    |

**Notes (0)**

Edit

Start a new  
CE case



You can add descriptive or explanatory notes about an organisation, separate from any case notes you might make if desired. Click in the **Notes** section to open the notes page for the organisation.

**Create Case**

Venue Support [+As Venue](#)

Community Education [+As Organisation](#)

- In the **Create Case** section, click [+ As Organisation](#) for community education as illustrated above.  
The **New Case** page opens with the organisation name displayed in the **Organisations** field.

### New Case

#### Community Education

Case Type \*  
Sporting Club

Organisations  
Ouyen Ice Hockey Club x

Agency  
VRGF - Victorian Responsible Gambling Foundation

Notes  

Enter your descriptive notes about the case here.

#### Parties

Organisations:  
[Ouyen Ice Hockey Club](#)  
(05) 6985 9874

#### Assignment

Primary CE Worker  
CamilleC

Secondary CE Worker  
None

#### > Activities

#### Status

Stage  
In Progress

#### Closure

Closed date  
dd/mm/yyyy

Closure Reason  
Please Select

#### Receipt

Started  
10/06/2016

#### Case Link

Case Links  
Search for cases by case id

Unlink this case

Save Save and Close Cancel

- 5 In the **Community Education** section:
  - ⚙ In the **Case Type** field,  select the case type.
  - ⚙ In the **Agency** field,  select your agency.
  - ⚙ In the **Notes** field, enter such notes that are relevant or applicable to the case.
- 6 In the **Assignment** section:
  - ⚙ In the **Primary CE Worker** field  select the community education worker who will have primary carriage of the case.
  - ⚙ **IF** required,  select a secondary community education worker.
- 7 In the **Status** section, in the **Stage** field,  select **In Progress**.

- 8 Click  Save and Close.

The case record displays in view mode. You can start recording activities against the case.


**CE-2016100736**  
**Ouyen Ice Hockey Club Sporting Club**

Details

Activities

Documents

Templates

Audit Log

Summary

Case Type:

Sporting Club

Stage:

In Progress

Status:

Open

Closure

Dates

Created:

less than a minute ago on 10/06/2016 08:42

Updated:

less than a minute ago on 10/06/2016 08:42

Received:

Today on 10/06/2016

Started:

Today on 10/06/2016

Latest Stage Change:

less than a minute ago on 10/06/2016 08:42

Notes

Enter your descriptive notes about the case here.

Activities (0) 

Parties

Organisations


[Ouyen Ice Hockey Club \(edit\)](#)
1
1

Users and Groups

Created By:

CamilleC

Primary CE Worker:

CamilleC

Secondary CE Worker:

Assigned to Agency:

Victorian Responsible Gambling Foundation

Linked Cases

[Link a new Community Education](#)

Edit

Print

### Service promotion cases

Community education service promotion cases differ from schools or sporting club cases in that they are not linked to a specific organisation. Rather, they apply to all service promotion activities conducted by your community education team across the entire catchment serviced by your agency.

### Creating a service promotion case

To create a service promotion case:

- 1 In the **Operations** menu select **New Community Education**.  
The **New Case** page displays.

## New Case

### Community Education

Case Type \*  
Service Promotion

Organisations  
Search for Organisations

Agency  
VRGF - Victorian Responsible Gambling Foundation

Notes  
B I P H1 H2 H3

Enter notes describing this case here.

### Parties

Organisations:

### Assignment

Primary CE Worker  
GenevieveE

Secondary CE Worker  
None

### > Activities

### Status

Stage  
In Progress

### Closure

Closed date  
dd/mm/yyyy

Closure Reason  
Please Select

### Receipt

Started  
08/06/2016

### Case Link

Case Links  
Search for cases by case id

Unlink this case  
☐

Save Save and Close Cancel

- 2 In the **Community Education** section:
  - ⚙ In the **Case Type** field,  select **Service Promotion**.
  - ⚙ In the **Agency** field,  select your agency.
  - ⚙ In the **Notes** field, enter such notes that are relevant or applicable to the catchment based case.
- 3 In the **Assignment** section:
  - ⚙ In the **Primary CE Worker** field  select the community education worker who will have primary carriage of the case.
  - ⚙ **IF** required,  select a secondary community education worker.
- 4 In the **Status** section, in the **Stage** field,  select **In Progress**.
- 5 Click .  
*The case record displays in view mode. You can start recording activities against the case.*

## 4 Recording community education worker activities

This section describes how you:

- ⚙ Process an activity
- ⚙ Schedule an activity and set a reminder
- ⚙ Cancel a scheduled activity
- ⚙ Record feedback from participants in education sessions.

### About activities

Work you do with schools or sporting clubs or service promotion are recorded in cases as *activities*. When you have delivered an education session you also record trainee feedback.

You have the option of scheduling an activity in advance and then processing the activity after completing it, or you can simply process an activity after the event.

When you schedule activities you have the option of setting a reminder for yourself in *Gambler's Help Connect* that will display in your activities calendar view and alert you twenty-four hours – or at a time of your choosing, before the scheduled activity.

Each activity is defined by [activity type and subtype](#).

When you record an activity you have the option of entering notes. With *Gambler's Help Connect* you can't edit notes you have entered in a previously saved activity. If you have made an error you want to correct, or you want to add more notes to a saved activity, you can add them as new notes which, when you save the activity, are added to your original notes. See [Activity notes](#) for a more detailed explanation.

You can attach a single document to an activity which then displays in the **Documents** tab of the case record (you can always scan a group of documents, for example training feedback sheets, and attach them to the relevant activity as a single document.)

When you mark an activity as complete, a timesheet displays in which you enter work and travel time for the staff who participated in the activity.

### Recording a completed community education case activity

When you process a completed activity you enter the time you spent on it. To record a completed activity:

- 1 Open the case for which you want to record an activity.
- 2 On the **Details** tab at the **Activities** section click .  
*The activity details page displays. The names of the primary (and secondary) community education worker display in the **Staff** field. If you are recording an activity for a school or sporting club case, the name of the school or sporting club displays in the **Organisations** field. If you are recording an activity for a service promotion case leave this field blank.*

# Gambler's Help Connect for Community Education Workers

## RECORDING COMMUNITY EDUCATION WORKER ACTIVITIES


CE-2016100736  
**Ouyen Ice Hockey Club Sporting Club**

**Activity Details**

Activity Type \*  
Sporting club activity

Activity Sub Type  
Education

Activity Sub Sub Type  
Delivery of session - senior female & male

Number of Participants  
25

Mode \*  
Face to face

Attendees \*  
Sporting - Players x  
Sporting - Club management x

Staff (assign this activity to someone or record the staff involved)  
Camille Community x

Organisations  
Ouyen Ice Hockey Club x

Previous notes (read only)

New notes  

**B** **I**   **P** **H1** **H2** **H3**

Descriptive notes about the activity go here

Location  
Sporting Club

When  
17/6/2016 19:30 

Send SMS Reminder  
☐

Activity Duration (H:M)  
01:00

Status  
Completed

Upload Document  
 No file chosen

**Reminders**

Restrict View & Edit To  
None

**Timesheet**

| Staff             | Notes           | Start Time       | Staff Time | Travel Time | Total Time | Delete                   |
|-------------------|-----------------|------------------|------------|-------------|------------|--------------------------|
| Camille Community | CE-2016100736 - | 17/06/2016 11:31 | 01:00      | 01:00       | 02:00      | <input type="checkbox"/> |

- In the **Activity Type** field,  select the type of activity you want to record.
- In the **Activity Sub Type** field,  select the activity sub type.
- IF** applicable, in the **Activity Sub Sub Type** field,  select the activity sub sub type.

# Gambler's Help Connect for Community Education Workers

## RECORDING COMMUNITY EDUCATION WORKER ACTIVITIES



*Not all activity types have a corresponding set of sub sub types. See [Activities](#) for a list of possible community education activity types and sub types.*

- 6 Where it is relevant, enter the number of people participating in the activity in the **Number of Participants** field.
- 7 In the **Mode** field,  select the delivery mode for this activity.
- 8 In the **Attendees** field,  select the attendee group or groups.



*If you are recording an administrative activity the mode is **Written** and the attendees are **Self**.*

- 9 The **Staff** field defaults with the name of the primary (and secondary if one is recorded) CE worker for the case. **IF** required, add or remove staff.



*To look up the name of a staff member in this field, enter the first couple of letters of their name and select them from the list that displays.*

- 10 In the **New Notes** field, enter your notes for this activity.
- 11 In the **Location** field,  select the location where the activity took place.
- 12 In the **When** field, use the calendar tool to select the date and time of the activity.
- 13 In the **Activity Duration (H/M)** field, select the duration of the activity.



*You can enter a value directly in this field in the format HH:MM.*

- 14 In the **Status** field,  select **Completed**.  
*The **Timesheet** section displays with a separate line for each member of staff you associated with the activity. The date and time you specified in the **When** field displays in the **Start Time** column and the value you entered in the **Duration** field now displays in the **Staff Time** column of the timesheet.*
- 15 **IF** necessary, change the duration value in the **Staff Time** column.
- 16 **IF** necessary add travel times for each member of staff on the timesheet.
- 17 Click .  
*The activity is completed.*

### Recording participant feedback

Participants in community education presentations to schools and sporting clubs are invited to submit feedback. You record feedback against the activity record for the presentation. You do this for each feedback sheet received:

- 1 From the case record open the activity you want to record feedback for.

**CE-2016100717**  
**Joshua Reynolds Senior Secondary College School**

**Activity Details**

Activity Type: Education  
 Activity Sub-Type: School - Teacher Presentation  
 Number of Participants: 5  
 Mode: Face to face  
 Attendees: School - Secondary school teacher  
 Staff: Bill Legge and Camille Community  
 Organisations: Joshua Reynolds Senior Secondary College  
 Notes: Half hour presentation of the Gambling is not a game curriculum pack  
 Summary: Education School - Teacher Presentation  
 Location: School  
 Start Time: 1 day ago on 14/06/2016 16:30  
 Activity Duration (H:M): 00:30  
 Status: Completed  
 Created By: Bill Legge  
 Attached document:

**Feedback**

[+ New Parent/Teacher Feedback](#) [+ New Student Feedback](#)

| Type                 | Created Date | Completed Date | Action |
|----------------------|--------------|----------------|--------|
| <a href="#">Edit</a> |              |                |        |

- 2 **IF:**

- ⚙ The case is for a school click [+ New Parent/Teacher Feedback](#) or [+ New Student Feedback](#) as appropriate.
- ⚙ The case is for a sporting club click [+ New Parent Feedback](#) or [+ New Player Feedback](#) as appropriate.  
The feedback page for that participant group displays.

- 3 The **Completed At** field defaults to today's date,  select the date the feedback was recorded.

## Gambler's Help Connect for Community Education Workers

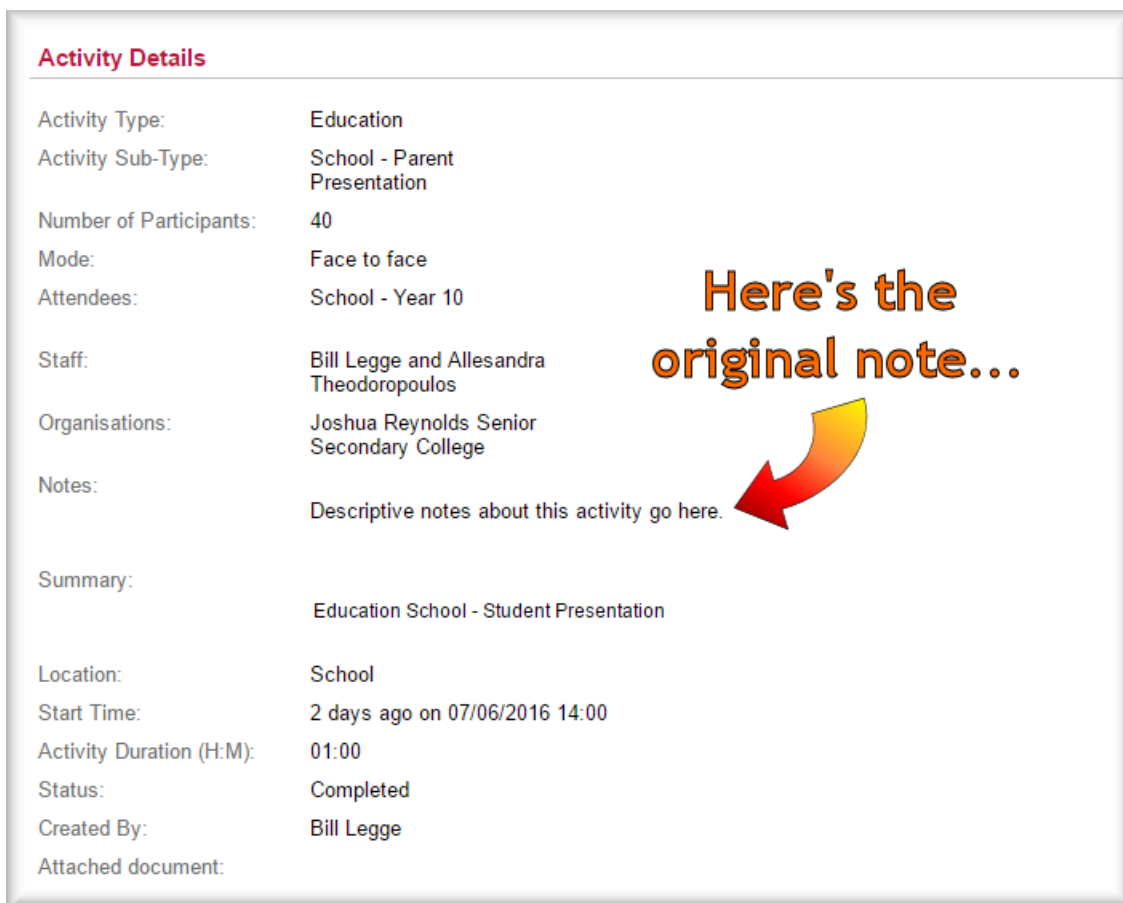
### RECORDING COMMUNITY EDUCATION WORKER ACTIVITIES

- 4 Record the feedback from the evaluation sheet into the feedback page.
- 5 Click  Save.
- 6 Repeat steps **2–5** for each evaluation sheet received for that activity.

#### Activity notes

When you record an activity you have the option of adding a descriptive note. You cannot change or delete an activity note once you save it. Notes you have saved in an activity record display in the **Previous Notes** field. However, you can append a correction or addition in the **New Notes** field. When you save the record, your additional notes display in the **Previous Notes** field below your original note. The sequence of illustrations below shows the process.

Notes saved in an activity display in the **Activity Details** section when you open the activity record in view mode.



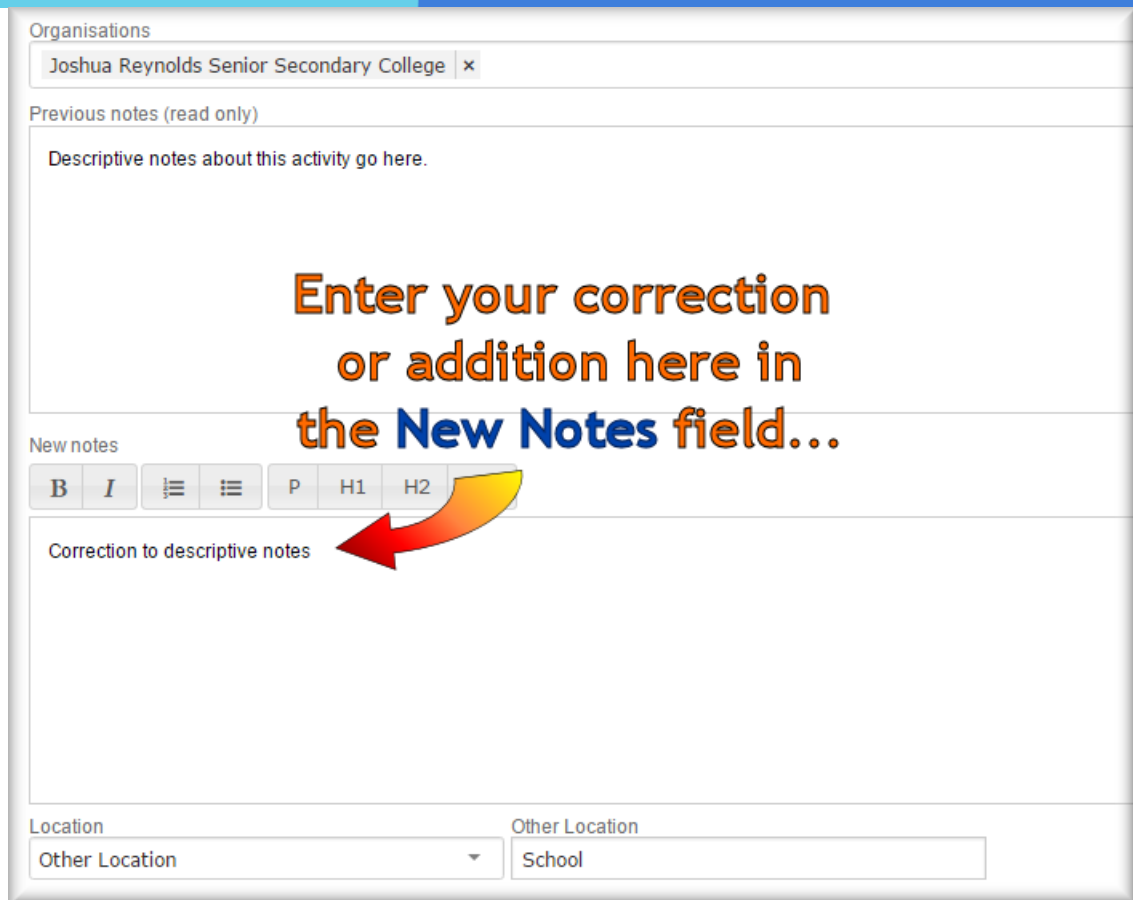
**Activity Details**

|                          |                                                |
|--------------------------|------------------------------------------------|
| Activity Type:           | Education                                      |
| Activity Sub-Type:       | School - Parent Presentation                   |
| Number of Participants:  | 40                                             |
| Mode:                    | Face to face                                   |
| Attendees:               | School - Year 10                               |
| Staff:                   | Bill Legge and Allesandra Theodoropoulos       |
| Organisations:           | Joshua Reynolds Senior Secondary College       |
| Notes:                   | Descriptive notes about this activity go here. |
| Summary:                 | Education School - Student Presentation        |
| Location:                | School                                         |
| Start Time:              | 2 days ago on 07/06/2016 14:00                 |
| Activity Duration (H:M): | 01:00                                          |
| Status:                  | Completed                                      |
| Created By:              | Bill Legge                                     |
| Attached document:       |                                                |

**Here's the original note...**



If you open the activity for editing you enter your correction or addition to the note in the **New Note** field.



Organisations

Joshua Reynolds Senior Secondary College x

Previous notes (read only)

Descriptive notes about this activity go here.

**Enter your correction  
or addition here in  
the New Notes field...**

New notes

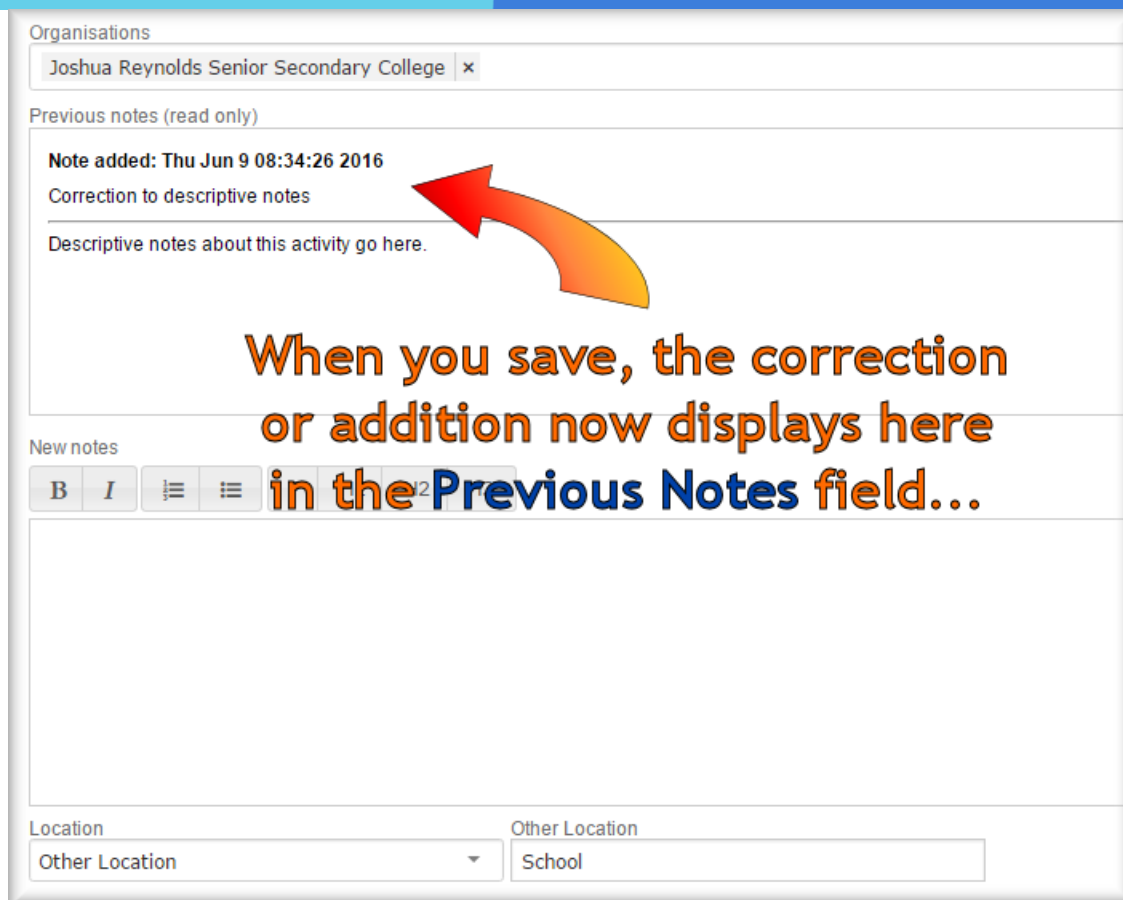
B I [List Icon] [List Icon] P H1 H2

Correction to descriptive notes

Location: Other Location

Other Location: School

When you save the amended activity record, your additional notes now display in the **Previous Notes** field.



Organisations

Joshua Reynolds Senior Secondary College x

Previous notes (read only)

Note added: Thu Jun 9 08:34:26 2016

Correction to descriptive notes

Descriptive notes about this activity go here.

**When you save, the correction or addition now displays here in the Previous Notes field...**

New notes

B I [List Icon] [List Icon]

Location: Other Location

Other Location: School

In the **Activity Detail** page the additions to the note display.

### Activity Details

|                          |                                                                                                                                                      |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity Type:           | Education                                                                                                                                            |
| Activity Sub-Type:       | School - Parent Presentation                                                                                                                         |
| Number of Participants:  | 40                                                                                                                                                   |
| Mode:                    | Face to face                                                                                                                                         |
| Attendees:               | School - Year 10                                                                                                                                     |
| Staff:                   | Bill Legge and Allesandra Theodoropoulos                                                                                                             |
| Organisations:           | Joshua Reynolds Senior Secondary College                                                                                                             |
| Notes:                   | <p><b>Note added: Thu Jun 9 08:34:26 2016</b></p> <p>Correction to descriptive notes</p> <hr/> <p>Descriptive notes about this activity go here.</p> |
| Summary:                 | Education School - Student Presentation                                                                                                              |
| Location:                | School                                                                                                                                               |
| Start Time:              | 2 days ago on 07/06/2016 14:00                                                                                                                       |
| Activity Duration (H:M): | 01:00                                                                                                                                                |
| Status:                  | Completed                                                                                                                                            |
| Created By:              | Bill Legge                                                                                                                                           |
| Attached document:       |                                                                                                                                                      |

Here's the amended note...

## Scheduling an activity

If desired, you can schedule a future activity for yourself or other members of your team. When you schedule an activity *Gambler's Help Connect* creates a reminder for all members of staff who are associated with that activity. The scheduled activity is also posted on the *Gambler's Help Connect* calendar which can be an aid in work planning and avoiding schedule conflicts. Scheduled activities also display in your **My Activities** list and in the **Activities** tab of the case record.



*Gambler's Help Connect provides a useful scheduling function but there is no obligation to use it.*

You can schedule an activity:

- ⚙ Directly in the case record in edit mode
- ⚙ From the **Activities** section of the case **Details** tab in view mode
- ⚙ From the **Activities** tab of the case record in view mode.

## Scheduling an activity in the case record in edit mode

- 1 Open the case you want to schedule an activity for and click  **Edit**.  
*The selected case opens in edit mode.*
- 2 Click **> Activities**.  
*The **Activities** section opens.*

**Parties**

**Organisations:**

[Joshua Reynolds Senior Secondary College](#)

5389 4658  
ClaudeL@JKSSC.vic.gov.au

**Assignment**

Primary CE Worker:

Secondary CE Worker:

**▼ Activities**

**Next Activity**

Activity Type:

Activity Sub-Type:

Staff:

Notes:

When:

Activity Duration (H:M):

Reminder Time:

**Education**

Title:

When:

- 3 In the **Activity Type**, field  select the activity.
- 4 In the **Activity Sub Type** field,  select the activity sub type.
- 5 **IF** applicable, in the **Activity Sub Sub Type** field,  select the activity sub sub type.
- 6 In the **Staff** field, search and select the staff you want to associate with this activity.
- 7 In the **Notes** field enter a brief descriptive note about the planned activity.



*The **Notes** field is system mandatory so if you don't enter something in this field you can't save the activity.*

- 8 In the **When** field select the date and time for the planned activity.
- 9 In the **Activity Duration (H:M)** field select the duration of the planned activity.

10 In the **Reminder Time** field, select the day and time you want to be prompted with a reminder.

11 Click .  
*The activity is scheduled.*

### Scheduling an activity in the activity record

1 Open the case for which you want to schedule the activity.

2 Either:

⚙ Click  in the **Activity** section of the **Details** tab of the case record

⚙ Select the **Activities** tab and then click .  
*The **Activity Details** page displays.*

3 In the **Activity Type** field,  select the type of activity you want to record.

4 In the **Activity Sub Type** field,  select the activity sub type.

5 **IF** applicable, in the **Activity Sub Sub Type** field,  select the activity sub sub type.

6 Where it is relevant, enter the number of people participating in the activity in the **Number of Participants** field.

7 In the **Mode** field,  select the delivery mode for this activity.

8 In the **Attendees** field,  select the attendee group or groups.

9 The **Staff** field defaults with the name of the primary (and secondary if one is recorded) CE worker for the case. **IF** required, add or remove staff.

10 In the **New Notes** field, enter your notes for this activity.

11 In the **Location** field,  select the location where the activity took place.

12 In the **When** field, use the calendar tool to select the date and time of the activity.

13 In the **Activity Duration (H/M)** field, select the duration of the activity.

14 Leave the default value in the **Status** field - **Opened**.

15 Click .  
*The activity is scheduled.*

### Viewing activities

There are three approaches you can take to viewing activities:

- ⚙ **My Activities** – this list shows all open activities where you are one of the specified staff. This can be useful where you want to quickly check for activities that you should have completed or for upcoming activities.
- ⚙ View all activities for a specific case – with this approach you can see all activities of all statuses for all staff for a particular case. You can do this by clicking **Activities** on the **Details** tab of the case record OR by clicking the **Activities** tab of the case record. This approach can be useful when you are reviewing a case and want to see what has been done or what needs to be done.

- ⚙ **Activities** search – this procedure enables you to search and filter all community education activities for all cases at your agency. This approach can be useful for a team leader who needs to cover an absence and wants to know what upcoming activities there are for the absent member of their team.

### Activity statuses

The **Status** field of the activity record has four possible statuses you might use:

- ⚙ **Opened** – the activity has been booked but not completed
- ⚙ **No show** – an event or meeting was cancelled (or you were stood up) by the party you were planning on meeting or presenting to after you turned up to the location.
- ⚙ **No action required** – use this status to cancel a scheduled activity where it isn't possible or necessary to reschedule it. You also use this status when you have scheduled an activity in error.
- ⚙ **Completed** – the activity is complete and you have entered your times.

### Rescheduling activities

You can reschedule any activity which has the status of **Opened**. This includes activities for which the due date is in the past:

- 1 From your **My Activities** list, or from the case record open the scheduled activity.
- 2 In the **When** field use the calendar function to set a new date and time for the activity.
- 3 Optionally, update the activity notes and location as required.
- 4 Click  **Save and Close**.  
*The activity is rescheduled.*

### Cancelling a scheduled activity

From time to time you might need to cancel a scheduled activity. The cancelled activity remains associated with the case history:

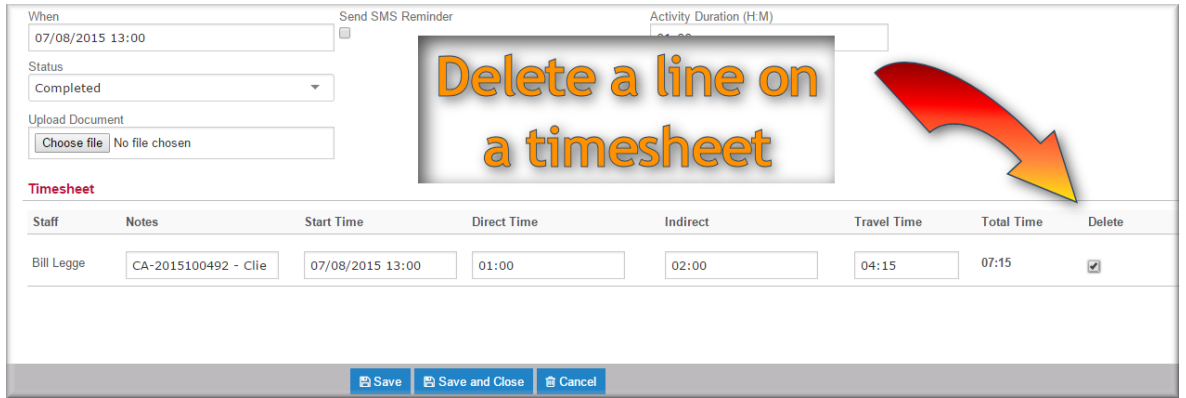
- 1 From your **My Activities** list, or from the case record open the scheduled activity.
- 2 In the **Status** field,  select **No action required**.
- 3 In the **New Notes** field, briefly describe the reason for the cancellation.
- 4 Click  **Save and Close**.  
*The scheduled activity is cancelled.*

### Cancelling a completed activity

From time to time an activity might be recorded in error. For example, an activity might be mistakenly recorded against the wrong client or case. You can cancel a completed activity:

- 1 Open the case record containing the activity you want to cancel.
- 1 Select the **Activities** tab.
- 2 In the activities list, locate the activity and click .  
*The activity record opens in edit view.*

- 3 In the **New notes** field, enter a note explaining the cancellation.
- 4 In the **Status** field,  select **No action required**.
- 5 In the **Timesheet**, select **Delete**.



When: 07/08/2015 13:00 Send SMS Reminder: ☐ Activity Duration (H:M): 00:00

Status: Completed

Upload Document:  No file chosen

**Timesheet**

| Staff      | Notes                | Start Time       | Direct Time | Indirect | Travel Time | Total Time | Delete                              |
|------------|----------------------|------------------|-------------|----------|-------------|------------|-------------------------------------|
| Bill Legge | CA-2015100492 - Clie | 07/08/2015 13:00 | 01:00       | 02:00    | 04:15       | 07:15      | <input checked="" type="checkbox"/> |

- 6 Click .



*If you just want to remove a member of staff from a closed activity, delete them from the **Staff** field and delete their timesheet entry. Then save and close.*

### 5 Managing cases

When managing your cases there are two procedures you might need to carry out:

- ⚙ Attaching documents to case records
- ⚙ Using template documents for school booking confirmations
- ⚙ Closing cases.

### Attaching documents to community education cases

You can attach documents of most common file types to a case record as applicable. Using the **Documents** keyword search you can search for documents by any words in the document filename, title or description.

When you attach a document you have the option of editing the document metadata to facilitate document searching.

To add a document to a case:

- 1 Save a copy of the document you want to attach to your PC or a network drive.
- 1 Open the case to which you want to attach the document.
- 2 Click the **Documents** tab.  
*The **Documents** tab displays.*
- 3 Click **Upload Document**.  
*The **Upload Document** screen displays.*

CE-2016100736  
**Ouyen Ice Hockey Club Sporting Club**

**Upload Document**

**Details**

**File**  
Choose file oihc.jpg

**Title**  
Ouyen Ice Hockey Club

**Description**  
Street view

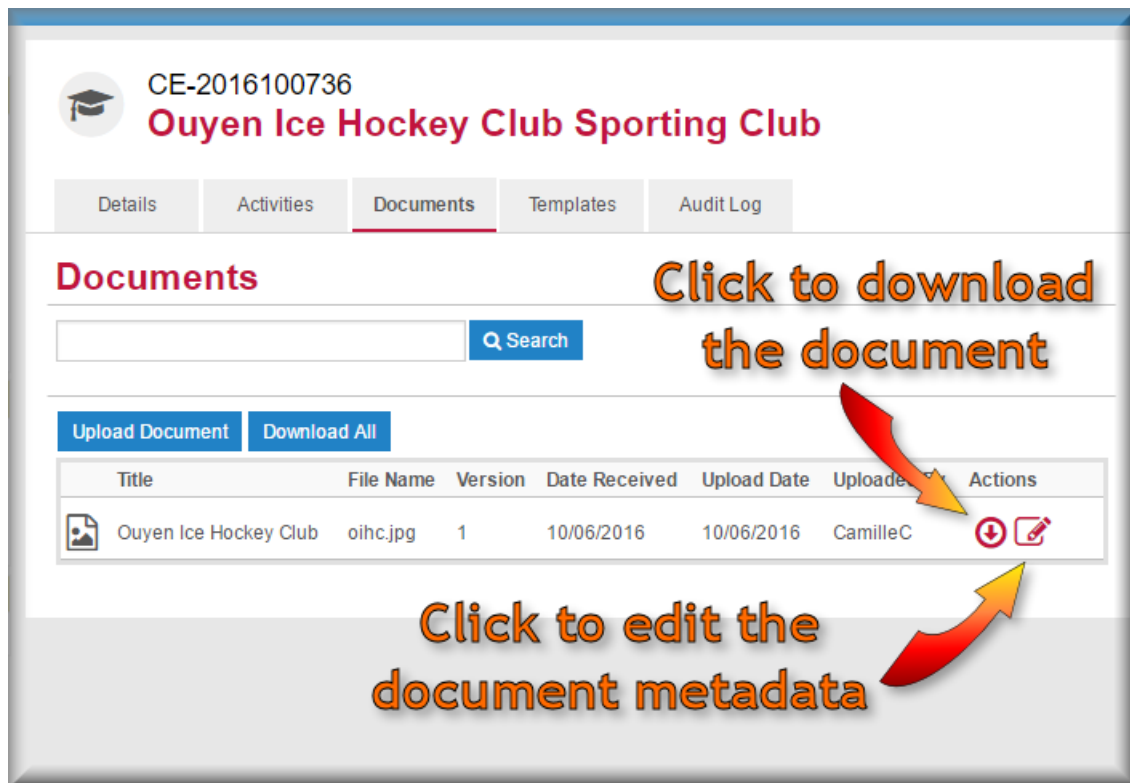
3999 character(s) remaining

**Date Received**  
10/6/2016

Save Cancel

- 4 In the **File** field click **Choose file**.  
*The standard Windows open file screen displays.*
- 5 Locate the file you want to attach and click **Open**.  
*You return to the **Upload Document** screen with the document listed in the **File** field.*

- 6 In the **Title** field enter the title you want for the document.
- 7 In the **Description** field enter a description of the document.
- 8 In the **Date Received** field  select the date the document was received.
- 9 Click .  
The saved document displays in the documents list.



### Downloading a document

To view or print an attached document you need to download it:

- 1 Open the case and click the **Documents** tab.
- 1 In the **Action** column click  next to the document you want to download.  
The document is saved to your PC.

### Using document templates

The **Templates** tab of the case record provides a document template you use to print a confirmation letter to schools for upcoming student presentation. The template extracts relevant information from the case and scheduled activity to populate the document, for example, school name, presentation date, and address.



*This is a generic document common to all local services.*

### Generating a template document



*Always schedule the school activity **BEFORE** you generate the booking confirmation document.*

To generate a booking confirmaiton for an upcoming school presentation:

- 1 Open the case record from which you want to generate a template document.
- 2 Click the **Templates** tab.  
*The templates list displays.*

CE-2016100717  
**Joshua Reynolds Senior Secondary College School**

DetailsActivitiesDocuments**Templates**Audit Log

Generate new document from template

| Template name               | Version of template | Template file name                       | Action |
|-----------------------------|---------------------|------------------------------------------|--------|
| School booking confirmation | 1.8                 | School program booking confirmation.docx |        |

Documents previously generated

| Generated at        | Generated by      | Template name               | Template version | Populated with party | File name                                                      |
|---------------------|-------------------|-----------------------------|------------------|----------------------|----------------------------------------------------------------|
| 20/06/2016 11:11:48 | Camille Community | School booking confirmation | 1.8              | N/A                  | <a href="#">CE-2016100717_School booking confirmation.docx</a> |

- 1 In the **Action** column of the list click for the template you want to use.  
*Gambler's Help Connect generates a word document based on the template and displays it in the **Documents previously generated** list.*
- 2 In the **Documents previously generated** section, click the [link](#) to the document in the **File name** column.  
*The document is downloaded to your PC.*



*Document download processes can vary depending on your browser and Windows version. Talk to your local IT support if you need help with this.*

- 3 You can now open the document for further editing or printing.

### Closing community education cases

You might close a case if:

- ⚙ The school or sporting club closes or otherwise ceases to operate
- ⚙ The school or sporting club discontinues the relationship
- ⚙ A case was created in error.

To close a case:

- 1 Open the case you want to close in view mode.
- 1 Check that all necessary activities are recorded against the case and any scheduled activities are [completed](#) or [cancelled](#).
- 2 Open the case you want to close and click . *The case opens in edit mode.*
- 3 In the **Status** section, in the **Stage** field,  select **Complete**.
- 4 In the **Closure** section in the **Closed date** field,  select the closure date for the case.
- 5 In the **Closure Reason** field,  select the reason for closing this case.

Click .

*The case is closed. Add an administrative activity to the closed case to account for your time in organising the case closure if applicable.*