

Getting started with Gambler's Help Connect

Copyright 2015 Victorian Responsible Gambling Foundation
PO Box 2156
Royal Melbourne Hospital, Victoria 3050

This is a controlled document. Details of the document ownership, location, distribution, status and revision history are listed below.

All comments or requests for changes to content should be addressed to the document owner.

Document Information			
Owner	Genevieve Endean		
Author	Bill Legge		
Audience	All Gambler's Help Connect users		
Project	GHC 1606.1		
Distribution	Genevieve Endean	Manager Business Systems	Victorian Responsible Gambling Foundation
	Adrian Simons	Application Administrator	Victorian Responsible Gambling Foundation
Document History			
Status	Changes	By	Date
Version 1.0	Release	Bill Legge	22/6/16

Contents

1	Summary	1
	Scope	1
	Who should read this document?	1
2	Basic functionality	3
	Logging on to <i>Gambler's Help Connect</i>	4
	Your <i>Gambler's Help Connect</i> homepage	5
	<i>Gambler's Help Connect</i> pages and fields	9
	Pages	9
	Changing your password	12
3	Lists, searches and filters	13
	Cases and case types	14
	Client cases	14
	Non-client cases	14
	Case, client and organisation names and numbers	16
	Case stages	16
	Lists	19
	Overdue cases	19
	Incoming cases	21
	My Cases and My Activities	22
	Searches	24
	Keyword searches and wildcards	24
	Cases24	
	Client searches	25
	Name searches	26
	Activities	30
	Issues	32
	Documents	32
	Using search filters	33
	The filters	34

1 Summary

This document describes the basics of how you use *Gambler's Help Connect*. It describe:

- ⚙ How to log on to the system
- ⚙ The basic features of the user interface
- ⚙ How information is organised and displayed in *Gambler's Help Connect*
- ⚙ How to enter information about clients, organisations, activities and cases in the system
- ⚙ How to search for records

Scope

Getting started with Gambler's Help Connect includes the following:

- ⚙ Logging on and changing your password
- ⚙ The *Gambler's Help Connect* user interface
- ⚙ Record types:
 - Client
 - Organisation
 - Activity
 - Case
- ⚙ Record naming and numbering rules
- ⚙ Lists
- ⚙ Searches
- ⚙ Filtering searches.

This document *does not* include the following:

- ⚙ Detailed business rules for managing clients, organisations, activities and cases
- ⚙ Detailed system procedures for creating and maintaining case, client and organisation records.

Who should read this document?

Getting started with Gambler's Help Connect is intended for All Gambler's Help Connect users.

2 Basic functionality

This section describes:

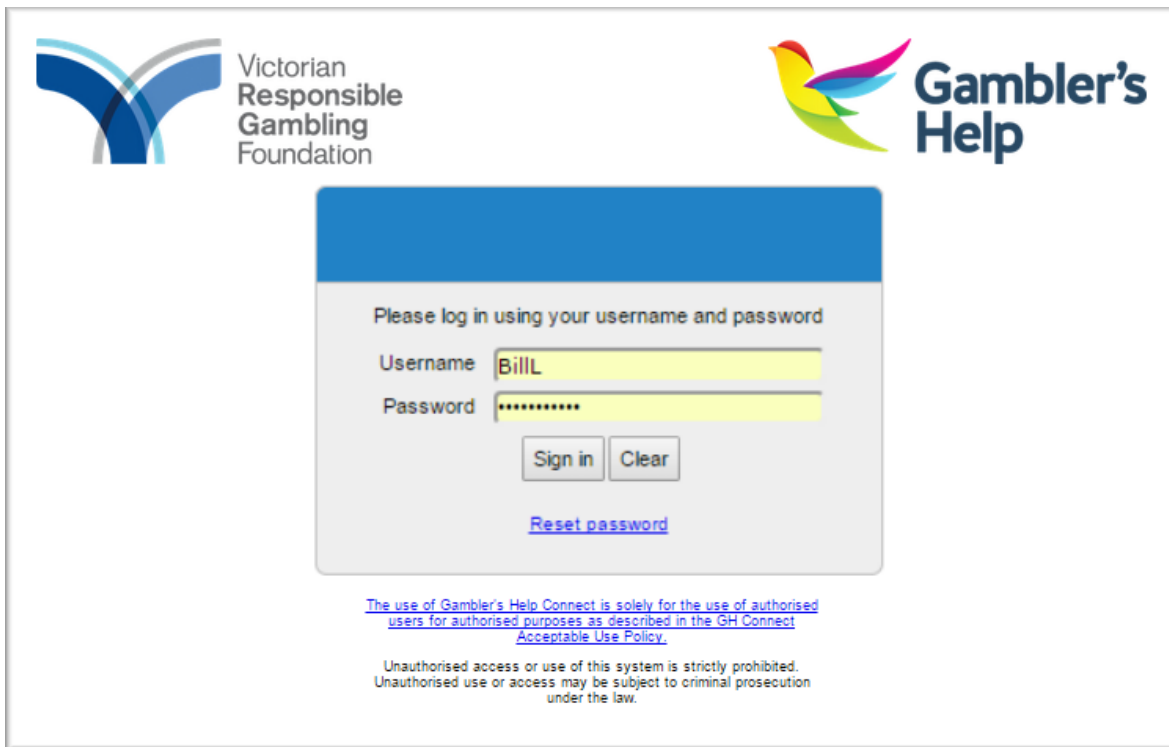
- ⚙ How to log on to *Gambler's Help Connect*
- ⚙ Your *Gambler's Help Connect* home page
- ⚙ The notifications pane and the navigation menu
- ⚙ Using *Gambler's Help Connect* pages and fields
- ⚙ Changing your password.

Getting started with Gambler's Help Connect

BASIC FUNCTIONALITY

Logging on to *Gambler's Help Connect*

- 1 Start *Gambler's Help Connect* in your preferred web browser.
The Log on screen displays.



- 2 Enter your user name in the **Username** field.



Your username is made up of your agency prefix, followed by your surname followed by the first initial of your given name.

- 3 Enter your password in the **Password** field.

- 4 Click .

*Gamblers Help Connect opens on your **My Cases** page.*



Both your username and your password are case sensitive.

Getting started with Gambler's Help Connect

BASIC FUNCTIONALITY

Your Gambler's Help Connect homepage

Your homepage in *Gamblers Help Connect* is **My Cases** page. This page displays when you log on.

GH Connect Welcome, BILL Change Password Sign Out

My Cases All Cases

Stage	Reference	Summary	Client	Agency	Created	Last Updated	Actions
	IS-2016100702	Older People		Victorian Responsible Gambling Foundation	01/06/2016 09:07:10	03/06/2016 09:14:33	
👍	CA-2015100535	200191 Orestes Agamemnonides Therapeutic Counselling	Orestes Agamemnonides	Victorian Responsible Gambling Foundation	25/06/2015 11:30:02	25/05/2016 08:45:30	
👍	CA-2015100203	200077 George, (Giorgio) Bingley Therapeutic Counselling	George, (Giorgio) Bingley	Victorian Responsible Gambling Foundation	31/03/2015 11:20:02	24/05/2016 07:10:23	
👍	CA-2015100306	200117 Menelaus Atreides Therapeutic Counselling	Menelaus Atreides	Victorian Responsible Gambling Foundation	01/04/2015 07:39:16	24/05/2016 07:10:00	
👍	CA-2016100691	200234 Reginald Clavicle Therapeutic Counselling	Reginald Clavicle	Victorian Responsible Gambling Foundation	23/05/2016 11:50:52	23/05/2016 12:06:27	
👍	CA-2015100513	200186 Clytemnestra Ledarovna Therapeutic Counselling	Clytemnestra Ledarovna	Victorian Responsible Gambling Foundation	15/06/2015 07:50:38	22/09/2015 07:09:27	
👍	CA-2015100518	200186 Clytemnestra Ledarovna Financial Counselling	Clytemnestra Ledarovna	Victorian Responsible Gambling Foundation	17/06/2015 07:37:19	22/09/2015 07:09:20	
👍	CA-2015100512	200184 Klaus Grossbasket Therapeutic Counselling	Klaus Grossbasket	Victorian Responsible Gambling Foundation	10/06/2015 14:29:17	22/09/2015 07:09:17	
👍	CA-2015100514	200186 Clytemnestra Ledarovna Therapeutic Counselling	Clytemnestra Ledarovna, Agamemnon Atreides	Victorian Responsible Gambling Foundation	15/06/2015 07:56:02	22/09/2015 07:09:11	
👍	CA-2015100545	200192 Griselda Lamington Therapeutic Counselling	Griselda Lamington	Victorian Responsible Gambling Foundation	17/07/2015 07:54:27	22/09/2015 07:08:59	
📁	GR-2015100308	Glorious Ilium	Agamemnon Atreides, Menelaus Atreides, Odysseus Laertides	Victorian Responsible Gambling Foundation	01/04/2015 07:45:47	22/09/2015 07:08:16	
👍	CA-2015100396	200155 Aphra Behn Therapeutic Counselling	Ronnie Wood, Aphra Behn	Victorian Responsible Gambling Foundation	07/04/2015 12:29:17	22/09/2015 07:08:11	
👍	CA-2015100538	200024 George Wickham Therapeutic Counselling	George Wickham	Victorian Responsible Gambling Foundation	25/06/2015 14:15:25	22/09/2015 07:08:06	
📁	GR-2015100284	Post Mortem Counselling	Agamemnon Atreides, Brian Jones, Audrey Hepburn	Victorian Responsible Gambling Foundation	31/03/2015 13:38:27	22/09/2015 07:07:57	
👍	CA-2015100511	200116 Sandra Sme Test Philo		Victorian Responsible	31/03/2015	22/09/2015	

The navigation menu displays down the left hand side of the *Gambler's Help Connect* screen. The notifications pane displays at the top of the *Gambler's Help Connect* screen. What you see in the navigation menu is determined by your role. In this example above you can see all the different roles.

Getting started with Gambler's Help Connect

BASIC FUNCTIONALITY



Notification pane

The notification pane is where you can:

- ⚙️ [?](#) Access the online help for *Gambler's Help Connect*
- ⚙️ [Welcome, MetroT](#) View who is logged into *Gamblers Help Connect*
- ⚙️ View any reminders you have:
 - - reminders
 - - no reminders.
- ⚙️ [Change Password](#) Change your password
- ⚙️ [Sign Out](#) Sign out of *Gamblers Help Connect*.

Navigation menu

The navigation panel down the left hand side of the screen is divided into five sections:

- ⚙️ Management
- ⚙️ Operations
- ⚙️ Search

- ⚙ Reporting
- ⚙ Administration



You may or may not see all these options. What you can see will depend on your role and user permissions.

Navigation Option	Used to...
Management	
Overdue	Cases referred in to your agency that have not received a response within the mandated period.
Operations	
Dashboard	Show key statistics for individual, team and agency.
Incoming	These are all incoming cases assigned to your agency.
New Case	Create a new client case.
New Community Education	Create a new community education case.
New Group Session	Create a new group session.
New Integrated Service	Create a new integrated service case.
New Venue Support	Create a new venue support case.
New Client	Add a new client.
My Cases	View and edit your assigned cases
Our Integrated Service	View and edit integrated service cases at your agency
My Activities	View your pending (or overdue) activities
Search	
Cases	Search cases from your agency.
Clients	Search clients
Pending COS	Telephone counsellors at the Gambling Helpline monitor this list to follow up with clients for the Client Outcome Survey.
Organisations	Search for organisations or add a new organisation.
Activities	Display and search all activities at your agency.
Issues	Search for cases by co-presenting a co-presenting issue or group of issues.
Documents	View documents attached to cases or activities.

Getting started with Gambler's Help Connect

BASIC FUNCTIONALITY

Agency Locator

Search for an agency service outlet by suburb or postcode.

Reporting

Run pre-configured and on-the-fly reports.

***Gambler's Help Connect* pages and fields**

You interface with the *Gambler's Help Connect* database via a web browser. Many of the features of *Gambler's Help Connect* are common to many modern web-based applications.

You:

- ⚙ View pages
- ⚙ Select tabs or links
- ⚙ Select or enter data in list or text fields
- ⚙ Click buttons.

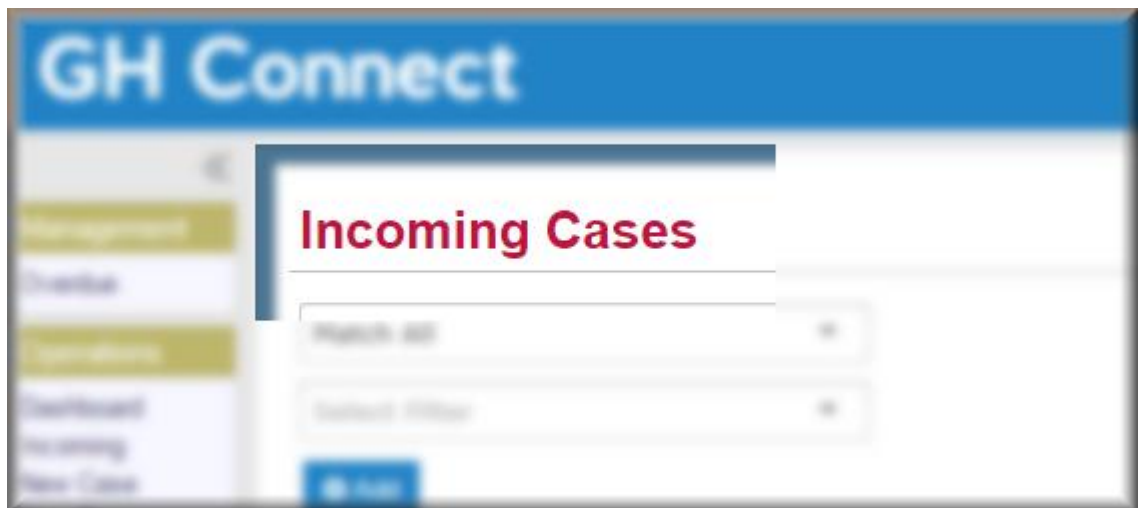
The next section provides more detailed descriptions and illustrations of *Gambler's Help Connect* pages and fields.

Pages

When you click a link in the navigation menu or in a record, *Gambler's Help Connect* displays a *page*. There are two main types of page:

- ⚙ *List pages* where you can view case or client records in a list
- ⚙ *Records pages* where you can view and edit information about clients, cases or activities.

Pages have a **red** title as illustrated below.



Case, client and activity records page have two modes:

- ⚙ **View** – you can view a summary of the record information and select tabs to view different aspects of the record
- ⚙ **Edit** – you can add or update information in the record.

View mode

You can always tell if a record page displays in view mode because you will see the  **Edit** button at the bottom centre of the page. In the **Client** and **Case** pages you will also see tabs across the top of the page. You can select these to view more information relating to the client or case.



Click here to view a [detailed illustration](#) of the Case page in view mode and to see a description of each of the tabs.

The **Client** and **Case** pages in view mode also have links you can select to create new cases or activities.



Click here to view a [detailed illustration](#) of the Clients page in view mode showing some of the links you can use

Edit mode

When a record is open in edit mode you can add or update information in it. To open a record in edit mode, either:

- ⚙ Open the record in view mode and then click .
- ⚙ Click  next to the record where it displays in a list.

Fields

In *Gambler's Help Connect* there are two type of fields where you enter data:

- ⚙ *List* fields where you select a value from a list
- ⚙ *Text* (or free-text) fields where you enter words or numbers directly.

In some text fields, for example telephone number fields, you must enter information in the correct format or *Gambler's Help Connect* will not save the page you're working on. If this happens an error message displays prompting you to enter a correct value.



Predictive search

All list fields in *Gambler's Help Connect* have a predictive search function. If you know the value you want to select you can enter the first couple of characters and the list will display all values matching your entry.



Click here to [view a demonstration](#) of predictive search in a Gambler's Help Connect list field.

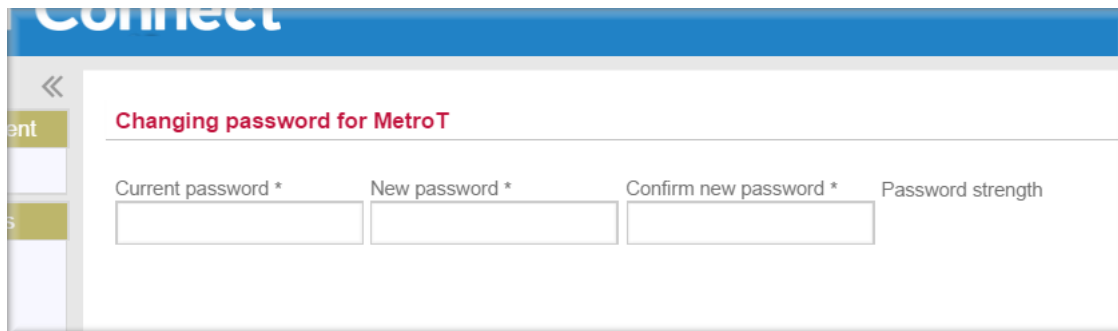
Changing your password

When you change your password, the following rules apply:

- ⚙️ Your password must be different from your user name
- ⚙️ You cannot use an old password that you previously used to log in to Gambler's Help Connect
- ⚙️ Your password MUST:
 - Be ten (10) characters long
 - Contain one (1) special character, e.g., \$, % *
 - Contain one (1) CAPITAL letter
 - Contain five (5) lower case letters
 - Contain one (1) numeric character

You can change your password from the notification pane at the top right hand corner of your screen.

- 1 Click **Change Password** in the notification pane.
*The **Changing password for** ... page displays.*



The screenshot shows a web interface for changing a password. At the top, there's a blue header with the word 'Connect' partially visible. Below it, a notification pane shows a back arrow and a 'Change Password' button. The main content area is titled 'Changing password for MetroT' in red. It contains four input fields: 'Current password *', 'New password *', 'Confirm new password *', and 'Password strength'. The first three fields are empty text boxes, while the 'Password strength' field is a dropdown menu.

- 2 Enter your current password into the **Current Password** field.
- 3 Enter your new password into the **New Password** field.
*In the **Password strength** field Gambler's Help Connect indicates the strength of your new password – it must be strong or very strong.*
- 4 Confirm your new password in the **Confirm Password** field.
- 5 Click **Save**.
Your password is changed.

3 Lists, searches and filters

In *Gambler's Help Connect* you access your clients and cases from *lists*. In some of these you will only see results from your own agency, in others you can see results from across the entire Gambler's Help program.

Some lists are very simple, while in others you need to apply *filters* to see the results you need.



You need to know what list to use and in which context to use it so you can quickly and reliably find the information you want and not miss the information you need.

This section describes the different ways you use lists to search *Gambler's Help Connect* for client, organisation and case records, and what you need to look for:

- ⚙ Case stages
- ⚙ Lists
 - Overdue cases
 - Incoming cases
 - My Cases and My Activities
- ⚙ Searches
 - Cases
 - Clients
 - Activities
 - Issues
 - Documents
- ⚙ Status icons
- ⚙ How to interpret case information in a list.

Cases and case types

There are two groups of case types in *Gambler's Help Connect*. These are:

- ⚙️ Client cases – where a person receives help from a Gambler's Help counsellor, financial counsellor or practitioner. This can be in a one-to-one setting, in their family or in a group.
- ⚙️ Non-client cases – where Gambler's Help agency workers engage more widely with the community through gaming venues, schools, community organisations and sporting clubs to educate or advocate for responsible gambling.

Client cases

In *Gambler's Help Connect* the term *client case* means an engagement between a client and the Gambler's Help service. There are eight types of case representing different contexts of client presentation and service:

- ⚙️ **Therapeutic counselling** – a person is a client of Gambler's Help receiving therapeutic counselling.
- ⚙️ **Financial counselling** - a person is a client of Gambler's Help receiving financial counselling.
- ⚙️ **Practitioner case – a person is a client of Gambler's Help In-language or Aboriginal service.**
- ⚙️ **Couples/Family** – partners (or other family members) who are clients of Gambler's Help receiving financial or therapeutic counselling as a couple or family group.
- ⚙️ **Recovery Assistance Program (RAP)** – this is a subordinate case where a therapeutic or financial counselling client receives material aid to enable them to continue treatment or to assist in recovering from the effects of gambling addiction.
- ⚙️ **Group** – more than one client of Gambler's Help receiving therapeutic or financial counselling concurrently from one or more therapeutic or financial counsellors.
A group case records a formal program of group therapy involving multiple clients over an extended schedule of sessions.
- ⚙️ **Callback** – a person is a client of Gambler's Help for the purpose of a follow up after an initial approach.
The callback client *might* progress to therapeutic or financial counselling or might accept no more service than one or more follow up calls.
- ⚙️ **Anonymous** – a person who is *not* a registered client but who receives service from Gambler's Help. An anonymous case can be for either therapeutic or financial counselling.

Non-client cases

In *Gambler's Help Connect* a non-client case records work done in the community by Gambler's Help agency workers. There are three types of non-client cases:

- ⚙️ **Venue support** – records work done by venue support workers in providing training and support services to staff and management at gaming venues.

- ⚙ **Community education** – records work done by community education workers in schools and sporting clubs and in promoting Gambler's Help services in the community.
- ⚙ **Integrated services** - records the planned activities carried out by Gambler's Help agencies in relationship building and partnership development across the community and health sectors.

Case, client and organisation names and numbers

The following naming rules apply to client and case records:

- ⚙ Client records have a six digit sequential UR number followed by the client name. For example **200004 Brian Jones**.
- ⚙ Organisation records have no
- ⚙ Case records are made up of a case type prefix, followed by the year followed by a six digit sequential case number, followed by the client number and name, followed by the case type. For example, **CA-2015100350 200133 Warwick Fairfax Therapeutic Counselling**.

Each case type has its own prefix and icon:

- ⚙  TC, FC, practitioner, anonymous and callback cases have the prefix **CA**
- ⚙  Group cases have the prefix **GR**
- ⚙  RAP cases have the prefix **RA**
- ⚙  .Community education cases have the prefix **CE**
- ⚙  Venue support cases have the prefix **VE**
- ⚙  Integrated service cases have the prefix **IS**.



Don't expect to see a perfect sequence of client or case numbers for the cases and clients at your agency. Other agencies are also registering clients and starting new cases.

Case stages

In *Gambler's Help Connect* cases have stages. Each stage indicates the status of the case from client presentation to closure. Each stage is represented by an icon that displays in the different case lists.

Gambler's Help Connect monitors the stage of each new case. Where a new case does not receive the required response from a local service within the mandated timeframe, *Gambler's Help Connect* automatically changes the stage to **Overdue** and reports the case in the **Overdue** list.



The timeliness with which a referral receives a response from a local service is a KPI/PPM for that agency. You can read about the [key performance indicators for local services](#) in the Program Guidelines p23.

Being able to recognise case stages and understanding what they indicate is important for:

- ⚙ Local service team leads or program managers who monitor team or agency case load and service delivery.

- ⚙ Intake workers to monitor uptake of cases by therapeutic or financial counsellors or practitioners.
- ⚙ Individual therapeutic or financial counsellors or practitioners to monitor their incoming cases to ensure that they provide the correct response in the required timeframe.

The table below gives a detailed reference to the case stages in *Gambler's Help Connect* and what they indicate about the status of the case record.



Sometimes therapeutic or financial counsellors or practitioners might work with a client and then get around to recording the work in the system later on. It's really important that you monitor your incoming cases and promptly report your response in Gambler's Help Connect or it looks like you haven't done anything about your new client – even if you have!

Stages for client cases

Case	Icon	Stage description
A client presents for service. An intake worker at a local service or a telephone counsellor at the Helpline creates a new case for them in <i>Gambler's Help Connect</i> .		Incoming: Indicates that a client has requested therapeutic or financial counselling, or callback, and has been referred to a local service. <i>Gambler's Help Connect</i> assigns a creation date to the case. The case displays in the Incoming list. The agency must respond by midnight of the following business day or the stage changes to Overdue and the case displays in the Overdue list.
The intake worker acknowledges receipt of the referral but is unable to contact the client or assign it to a counsellor at this time.		Acknowledged: Indicates the case is 'parked' until the intake worker can successfully contact the client or assign it to a counsellor. The case displays in the Incoming list.
The intake worker assigns a counsellor to the case as primary care provider.		Assigned: Indicates the intake worker has referred the case to therapeutic or financial counsellor for follow up. The case displays in the Incoming list and in the My Cases list of the assigned counsellor. The counsellor must respond by midnight of the following business day or the stage changes to Overdue and the case displays in the Overdue list.
The therapeutic or financial counsellor accepts the referral and proceeds with the case.		Accepted: Indicates the case is active. The case displays in the Cases list and in the My Cases list of the assigned counsellor.
The therapeutic or financial counsellor is unable to proceed with the case.		Rejected: Indicates the counsellor rejected the assignment and another counsellor must be assigned.

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

Case	Icon	Stage description
		<i>The case again displays in the Incoming list. The agency must still respond by midnight of the following business day or the stage changes to Overdue and the case displays in the Overdue list.</i>
Treatment service finishes.		Completed: <i>The case is inactive. (This stage can apply to any case type).</i> <i>The case displays in the Cases list.</i>
A group case is active.		Active: <i>A group case is active.</i> <i>The case displays in the Cases list and in the My Cases list of the assigned counsellor.</i>
The agency has not responded to the referral within the required timeframe.		Overdue: <i>Indicates the case stage is either incoming, assigned or rejected (or a combination of these) beyond midnight of the business day following the creation date (incoming), the assigned date (assigned) or the rejection date (rejected).</i> <i>The case displays in the Overdue list.</i>

Stages for non-client cases

The non-client cases have two possible stages:

- ⚙ **In Progress** – the case is active
- ⚙ **Complete** – the case is closed.

Non- client cases don't have stage icons.

Lists

Gambler's Help Connect displays case, client, organisation and activity records in lists. You can search lists to identify a record you want to work with. You can also [filter](#) lists to display records matching specific search criteria. For example, you can filter the **Incoming** list to see which cases have no assigned counsellor against them. Getting to know the structure and parameters of each list is important in helping you find the records you want quickly and reliably.

You can use these lists in *Gambler's Help Connect* to view cases or activities within your agency:

- ⚙ **Overdue** – listing cases that have not had the required response in the mandated timeframe.
- ⚙ **Incoming** – listing new cases. All new referrals from the Gambler's Helpline display in this list.
- ⚙ **My Cases** – listing all active cases assigned to an individual counsellor or financial counsellor, practitioner, community education worker or venue support worker.
- ⚙ **Our Integrated Service Cases** – listing all active integrated service cases at your agency.
- ⚙ **My Activities** – listing all pending or incomplete activities for an individual counsellor or financial counsellor.

Overdue cases

A new client case becomes overdue if it is not *acknowledged* by an intake worker or *accepted* by a care provider by midnight of the business day following creation of the case in *Gambler's Help Connect*. If an intake worker *assigns* a case to a counsellor and they do not accept the case by midnight of the business day following the creation date the case displays in the **Overdue** list. (An assigned case also displays in the **My Cases** list of the counsellor to whom it is assigned).

Overdue Cases										
Match All Select Filter Add Enter search query Search Export										
New Case New Group Session New Integrated Service										
Stage	Reference	Summary	Assignee	Client	Agency	Case Type	Created	Last Updated	Closed	Actions
!	CA-2015100434	200032 Lydia Bennett Therapeutic Counselling		Lydia Bennett	Banyule - West Heidelberg	Therapeutic Counselling	20/04/2015	06/06/2016		
!	CA-2016100675	200117 Menelaus Atreides Callback		Menelaus Atreides	Banyule - West Heidelberg	Callback	11/05/2016	06/06/2016		
!	CA-2015100561	200198 Elizabeth Gaskell Callback		Elizabeth Gaskell	Banyule - West Heidelberg	Callback	03/09/2015	22/09/2015		

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

You can filter the **Overdue Cases** list to view cases by a particular attribute, for example, team or case type. From the **Overdue Cases** list you can:

- ⚙ Open a case in view mode by clicking the [case link](#).
- ⚙ Open the case in edit mode by clicking the edit icon .
- ⚙ Open the client record in view mode by clicking the [client link](#).
- ⚙ Send an email to the primary care provider by clicking the email icon .



For more information on how to use filter your list results, see [Using search filters](#).

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

Incoming cases

When a new client case is created, *Gambler's Help Connect* automatically assigns it the stage of **Incoming**. All new cases referred to local services by the Gambler's Helpline display here. As noted above, cases in the incoming stage have until midnight of the following business day to either be acknowledged by the intake worker or accepted by a primary care provider.



When a case in incoming stage exceeds the time allowed for acknowledgement or acceptance, Gambler's Help Connect changes the stage to **Overdue** and moves the case to the **Overdue** list. If you were planning on accepting a case in the **Incoming** list and then couldn't find it have a look in there.

Incoming Cases									
Match All Select Filter + Add Enter search query Q Search Export									
New Case New Group Session									
Reference	Summary	Assignee	Client	Agency	Case Type	Created	Last Updated	Closed	Actions
CA-2015100420	200595 Neave Smith Therapeutic Counselling	YvetteP	Neave Smith	Metro Inner GHC Training (Mont Albert)	Therapeutic Counselling	24/04/2015	15/05/2015		
CA-2015100480	200619 James Dean Financial Counselling		James Dean	Metro GHC Training Agency	Financial Counselling	24/04/2015	24/04/2015		
CA-2015100477	200620 Gerry Gee Therapeutic Counselling	Learner7H	Gerry Gee	Metro GHC Training Agency	Therapeutic Counselling	24/04/2015	24/04/2015		
CA-2015100472	200613 Lara Hinklebottom Callback	Learner14H	Lara Hinklebottom	Metro GHC Training Agency	Callback	24/04/2015	24/04/2015		
CA-2015100471	200612 Kylie Minogue Callback		Kylie Minogue	Metro GHC Training Agency	Callback	24/04/2015	24/04/2015		
CA-2015100469	200606 Noc Phuoc Callback		Noc Phuoc	Metro GHC Training Agency	Callback	24/04/2015	24/04/2015		
CA-2015100468	200598 Sweet Lolly Callback		Sweet Lolly	Metro GHC Training Agency	Callback	24/04/2015	24/04/2015		
CA-2015100467	200603 Roger Rogerson Callback		Roger Rogerson	Metro GHC Training Agency	Callback	24/04/2015	24/04/2015		
CA-2015100466	200608 Happy Easter Callback		Happy Easter	Metro GHC Training Agency	Callback	24/04/2015	24/04/2015		
CA-2015100465	200601 Monica Bee Callback		Monica Bee	Metro GHC Training Agency	Callback	24/04/2015	24/04/2015		

You can filter the **Incoming Cases** list to view cases by a particular attribute, for example, team or case type. From the **Incoming Cases** list you can:

- ⚙ Open a case in view mode by clicking the [case link](#).
- ⚙ Open the case in edit mode by clicking the edit icon
- ⚙ Open the client record in view mode by clicking the [client link](#).
- ⚙ Send an email to the primary care provider by clicking the email icon .

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS



For more information on how to use filter your list results, see [Using search filters](#).

My Cases and My Activities

The **My Cases** and **My Activities** lists display all your cases and all your pending or uncompleted activities.

My Cases

In **My Cases** you will find all active cases where you are the Primary Care Provider, Primary Community Education Worker or Venue Support Worker.

My Cases							All Cases
Stage	Reference	Summary	Client	Agency	Last Updated	Actions	
	CA-2015100493	200626 George Wickham Therapeutic Counselling	George Wickham	VRGF-Training	13/07/2015 09:20:34		
	CA-2015100134	200046 Estrella Havisham Therapeutic Counselling	Estrella Havisham	VRGF-Training	13/07/2015 07:20:48		
	CA-2015100136	200048 George Bingley Therapeutic Counselling	George Bingley	VRGF-Training	19/06/2015 11:47:32		
	CA-2015100616	201161 Mustrum Ridcully Therapeutic Counselling	Mustrum Ridcully	VRGF-Training	13/07/2015 09:27:25		
	CA-2015100492	200625 Gytha Ogg Therapeutic Counselling	Gytha Ogg	VRGF-Training	19/06/2015 11:47:36		
	CA-2015100296	200539 Lydia Bennett Therapeutic Counselling	George Wickham, Lydia Bennett	VRGF-Training	13/07/2015 09:30:02		

You can:

- ⚙️ Open the case in view mode by clicking the [case link](#)
- ⚙️ Open the case in edit mode by clicking the edit icon



If you want to review your closed cases, use the **Cases** search.

Family therapy cases

You can identify a family therapy case by the extra client(s) in the **Client** column. In the illustration below you will observe that Lydia Bennett's case also has her husband George Wickham listed as a client, indicating that this is a family therapy case.

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

My Cases							All Cases
Stage	Reference	Summary	Client	Agency	Last Updated	Actions	
👍	CA-2015100493	200626 George Wickham Therapeutic Counselling	George Wickham	VRGF-Training	13/07/2015 09:20:34		
👍	CA-2015100134	200046 Estrella Havisham Therapeutic Counselling	Estrella Havisham	VRGF-Training	13/07/2015 07:20:48		
👍	CA-2015100136	200048 George Bingley Therapeutic Counselling	George Bingley	VRGF-Training	19/06/2015 11:47:32		
👍	CA-2015100492	200625 Gyltha Ogg Therapeutic Counselling	Gyltha Ogg	VRGF-Training	13/07/2015 09:27:25		
👍	CA-2015100296	200539 Lydia Bennett Therapeutic Counselling	George Wickham, Lydia Bennett	VRGF-Training	19/06/2015 11:47:36		

Two client names indicates a family therapy case

My Activities

In **My Activities** you can see all your pending or uncompleted activities.

My Activities

All Activities

Case Type

Select Case Type

Activity Type

Select Activity Type

Q Search

Activities

Activity Type	Title	When	Duration	Status	Case	Case Assignee	Staff	Actions
Client Activity	Client Activity Counselling:Therapeutic	18/05/2015 15:00	01:00	Opened	200632 Joe Strummer Therapeutic Counselling	Metro Trainer	Metro Trainer	
Client Activity	Client Activity Counselling:Therapeutic	27/04/2015 10:00	01:00	Opened	200583 Esmerelda Weatherwax Therapeutic Counselling	Metro Trainer	Metro Trainer	

You can:

- ⚙️ Open the activity in view mode by clicking the [activity type](#) link
- ⚙️ Open the activity directly for editing by clicking the edit icon
- ⚙️ Open the case record in view mode by clicking the [case link](#).

Searches

Searches are not much different from lists except you typically *filter* them to search for particular records or groups of records. You can run searches for:

- ⚙ Cases
- ⚙ Clients
- ⚙ Organisations
- ⚙ Activities
- ⚙ Issues
- ⚙ Documents.

This section describes the different search pages and how you use them.

Keyword searches and wildcards

All the searches described below include a keyword or phrase search function. This can be helpful when you are looking for a case, activity, issue or document and you don't know the exact term.

When entering your search terms:

- ⚙ Search matches the words that start with the search term you entered. For example, searching for **Joh** will match *John*, *Johnson* and *Johannes*.
- ⚙ To find text appearing anywhere in a word use the wildcard symbol *****. For example, searching for ***son** will match *Johnson*, *Wilson*, *Jackson* and *Parson*, while **J*son** will match *Jason*, *Jacobson* and *Johansson*.
- ⚙ To find text when you aren't sure of the spelling use the wildcard symbol **~**. For example, **John~** will also return *Jon*.
- ⚙ To search for a key phrase enclose the text in double quotes. For example, a document search for "Letter from GP" will return all documents containing that key phrase in either the title or description

Cases

With the **Cases** page you can see all cases recorded for your agency of any type, status or owner.



If you need to query the case history of a client at a different agency you need to use the [client search](#) and then view the case list for that client.

The **Cases** page opens with a blank display. When you click  it displays all cases at your agency. You can [filter](#) your cases search to display cases meeting particular search criteria. For example, you can filter a case search to find cases assigned to a specific care provider, or cases where the client is an affected other.

From the **Cases** page you can click:

- ⚙  to export the list as a .csv file you can open and edit in Excel.

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

- ⚙️ **New Case** to create a new case.
- ⚙️ **New Group Session** to create a new group case.

The illustration below shows a typical unfiltered case list.

The screenshot shows the 'Cases' interface with a table of cases. Annotations with arrows point to specific rows:

- Integrated service case** points to the first row (IS-2016100707).
- Accepted client case** points to the second row (CA-2015100075).
- Overdue case** points to the third row (CA-2015100561).
- Group case** points to the fourth row (GR-2015100173).
- RAP case** points to the fifth row (RA-2015100079).

Stage	Reference	Summary	Client Name	Agency	Case Type	Created	Last Updated	Closed	Actions
	IS-2016100707	Aboriginal and Torres Strait Islander Communities	Sandra T	Banyule - West Heidelberg		03/06/2016	03/06/2016		
	CA-2015100075	200031 William Collins Therapeutic Counselling	Phil Townshend	William Collins	Banyule - West Heidelberg	16/03/2015	06/06/2016		
	CA-2015100561	200198 Elizabeth Gaskell Callback	Elizabeth Gaskell	Banyule - West Heidelberg	Callback	03/09/2015	22/09/2015		
	GR-2015100173	200062 Mr Smarty Pants Therapeutic Counselling	Clarissa P	Mr Smarty Pants George Wickham	Banyule - West Heidelberg	27/03/2015	01/04/2015		
	RA-2015100079	200029 Obadiah Slope Gambler	Franc S	Obadiah Slope	Banyule - West Heidelberg	16/03/2015	16/03/2015	16/03/2015	

Client searches

The client search is a very important part of the intake workflow, since you should always start by searching when creating a new case – you don't want to duplicate an existing record!

When searching for a client record you can search by:

- ⚙️ All or part of a client's name
- ⚙️ UR number
- ⚙️ Telephone number.



You won't always have the exact spelling of a person's name to run a client search. Also, quite a few names have variant spelling, e.g. Katie and Katy. Hence, it's a good idea to try a couple of searches using variant spelling to make sure that client record exists (or doesn't). Once you have found the record you can confirm the telephone number and date of birth with the client.

The illustrations below give an example of the different results you get using different search variants.

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

Name searches

There are a number of ways you can search for a client's name.

Whole name search

When you search for the whole name, *Gambler's Help Connect* will look for records that match ANY of the search terms you use. In this example you can see that when searching for *Brian Jones*, *Gambler's Help Connect* listed all clients named Jones (as well as Brian). If you enclose the whole name in double quotes, e.g. "Brian Jones" the search will only return client records that are an exact match.



This search also returns results where any of the words in the client record match your search term. This includes email address or street name.

Clients

brian jones

Client search by whole name

Name	UR Number	Phone	Email	Preferred Contact	Actions
Brian Jones	200004	(0402) 569 873	BJ@19thnervousbreakdown.co	Main Phone	
Tom Jones	200122	8999 4562			
Rob Jones	200121	9999 1455			
Clem Jones	200036	(0411) 888 944		Main Phone	
Janie Jones	200035	(0401) 546 564	janie@jones.com	SMS	

Surname search

You will note that the search result using the surname only is identical to the previous illustration.

Clients

Client search by surname

Name	UR Number	Phone	Email	Preferred Contact	Actions
Brian Jones	200004	(0402) 569 873	BJ@19thnervousbreakdown.co	Main Phone	
Tom Jones	200122	8999 4562			
Rob Jones	200121	9999 1455			
Clem Jones	200036	(0411) 888 944		Main Phone	
Janie Jones	200035	(0401) 546 564	janie@jones.com	SMS	

Given name search

In this example a search using the given name has yielded a single result – had there been any other Brians

Clients

Client search by given name

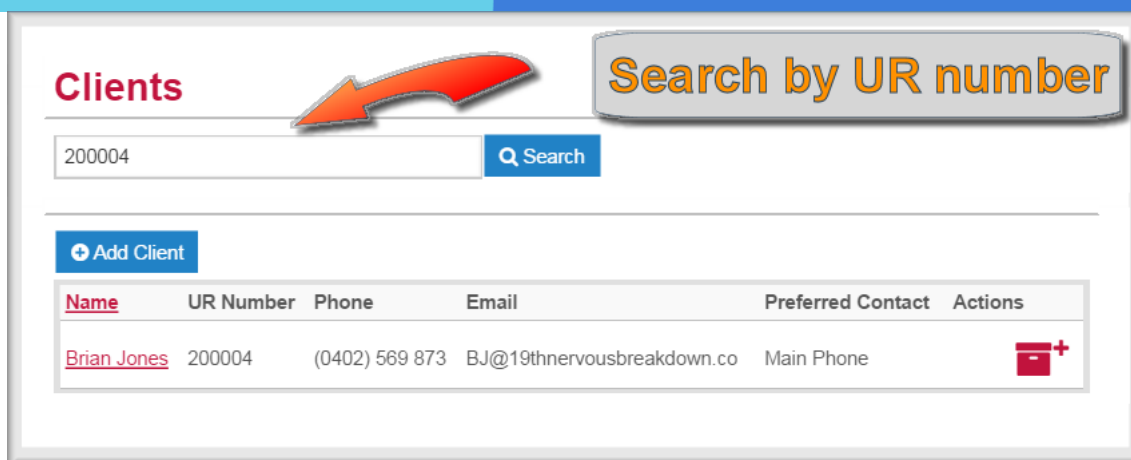
Name	UR Number	Phone	Email	Preferred Contact	Actions
Brian Jones	200004	(0402) 569 873	BJ@19thnervousbreakdown.co	Main Phone	

UR number search

Searching by UR number is fast and accurate – as long as you know the number. You can search by part of the UR number if you don't know the whole number.

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

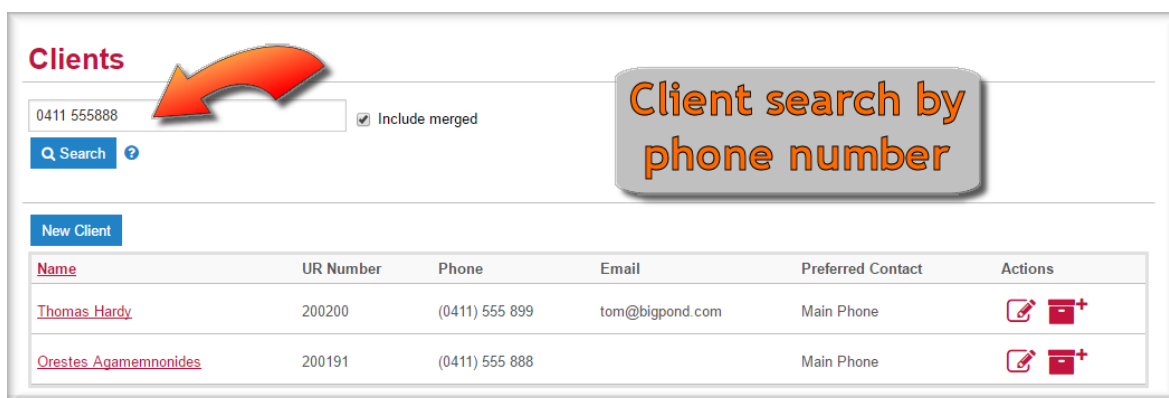


The screenshot shows the 'Clients' search page. A red arrow points from the 'Search by UR number' button to the search input field. The input field contains '200004' and a 'Search' button. Below the input field is an 'Add Client' button. A table lists client records with columns: Name, UR Number, Phone, Email, Preferred Contact, and Actions. One record is visible for 'Brian Jones' with UR Number 200004.

Name	UR Number	Phone	Email	Preferred Contact	Actions
Brian Jones	200004	(0402) 569 873	BJ@19thnervousbreakdown.co	Main Phone	 

Phone number search

Occasionally you might receive a call without getting the name of the caller but with their phone number displayed on the call log.



The screenshot shows the 'Clients' search page. A red arrow points from the 'Client search by phone number' button to the search input field. The input field contains '0411 555888' and a 'Search' button. There is a checkbox labeled 'Include merged'. Below the input field is a 'New Client' button. A table lists client records with columns: Name, UR Number, Phone, Email, Preferred Contact, and Actions. Two records are visible: 'Thomas Hardy' and 'Orestes Agamemnonides'.

Name	UR Number	Phone	Email	Preferred Contact	Actions
Thomas Hardy	200200	(0411) 555 899	tom@bigpond.com	Main Phone	 
Orestes Agamemnonides	200191	(0411) 555 888		Main Phone	 

Merged clients and other identifiers searches

There are two other elements of the keyword search you should consider:

- ⚙ **Merged records** - Client records are merged when a duplicate registration is identified. If you select **Include merged** ☒ Include merged your search will include merged records.
- ⚙ **Other identifiers** –is a free text field in the client record which can be used to record additional identity details not recorded elsewhere, e.g. a UR number from a local case management system. Values in this field will also return results in a client search.

Searching for a client record

You can search by all or part of a client's name, by their UR number or by all or part of their telephone number.

To search for a client record:

- 1 In the Navigation Menu select **Search: Clients**.
The **Clients** search page displays.

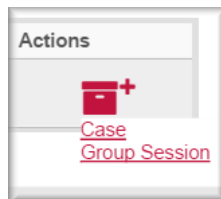
- 2 Enter the client search term you want to use in the search field and then click

 Search

Client records matching your search display.

The client action icon

The client action icon  displays at the end of each row in the list. If you hover your mouse over the icon an action menu displays.



Depending on the option you select you can create a new individual or group case for the client.



View an [interactive image](#) of the client record.

Organisations

With the organisation keyword search you can look up the details of any organisation registered in *Gambler's Help Connect*.

Organisations

Mal

Q Search

+ Add organisation

Name	Organisation Type	Phone	Actions
Malcolm Fraser Secondary College for Boys	School	(05) 2678 9352	 
Malvern Central School	School	8823 9500	 

Activities

The **Activities** search enables you to query all activities of any status at your agency. There are a number of scenarios when you might use this:

- ⚙ To see a consolidated list of all activities for a particular client, for a particular case or across all cases for that client
- ⚙ To view open activities for a particular client
- ⚙ When covering for an absent colleague to check for scheduled activities.

When setting an activities search you can use the following search criteria either singly or in combination:

- ⚙ **Keyword** – search for any text in the notes in an activity
- ⚙ **Case Type** – search for activities of a given case type Therapeutic or Financial counselling, or Group session
 - **Activity type** – determined by your case type selection
 - **Activity Sub-Type** – determined by your activity type selection
- ⚙ **Status** – search for activities by status:
 - **Opened**
 - **Completed**
 - **No action required** (cancelled)
 - **No Show**
- ⚙ **Parties** – search for activities for a specific client
- ⚙ **Staff** – search for activities for a specific counsellor.

The illustration below shows an activity search for completed therapeutic counselling activities for a specific client in a TC case for a specific counsellor.

Activities

Case Type

Case

Activity Type

Client Activity

Activity Sub Type

Counselling:Therapeutic

Status

Completed x

Parties

Lachlan MacQuarie

Staff

Bill Legge (BillL)

Q Search

Client Activity Counselling:Therapeutic

Notes

Note added: Thu May 21 15:48:44 2015

The same day Bigge's first volume was tabled in the Lords. Apparently it now began to circulate publicly, but with remarkable restraint Macquarie... (continued)

Activity Type

Client Activity

Staff

Bill Legge

Summary

Client Activity Counselling:Therapeutic

Start Time:

17/04/2015 15:04

Status:

Completed

Created By

Client Activity Counselling:Therapeutic

Notes

Note added: Tue Jun 2 10:39:30 2015

Had a good meeting

Running an activity search

To run an activity search:

- 1 In the Navigation Menu select **Search: Activities**.
*The **Activities** page displays all activities of all types and statuses recorded at your agency.*
- 2 Select your search criteria.
- 3 Click **Q Search**.

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

Issues

Co-presenting issues are recorded against a therapeutic or financial counselling case. This can be done at intake, or during the course of a case. You can search for issues by type or outcome or by using a keyword or phrase, or by a combination of these.

Issues

Outcome

Issue
Disability x

Description	Issue	Case	Actions
Broken leg	Disability	200173 Ricky Martin Financial Counselling	
Is an unquiet ghost.	Disability	200043 Agamemnon Atreides Therapeutic Counselling	
Client has a broken leg and cannot walk up stairs.	Disability	200036 Clem Jones Financial Counselling	

Documents

This is a keyword search you can run for all documents attached to cases at your agency. The search includes both the document title and description.

Documents

Case	Title	File Name	Version	Date Received	Upload Date	Uploaded By	Actions
CA-2015100306	Letter from GP	2014.docx	1		12/05/2015	BillL	

Using search filters

Search filters allow you to add multiple search criteria in a query. Search filters provide a quick and effective way for you to examine the different attributes of cases at your agency. You can use search filters in:

- ⚙ **Overdue**
- ⚙ **Incoming**
- ⚙ **Cases.**

Search *filter expressions* allow you to run detailed queries of your case records both for monitoring service delivery and for examining the characteristics of the cases at your agency.



View a demonstration of [search filters](#).

The illustration below shows an example of a Cases query for therapeutic counselling cases assigned to a specified user, where no activities have been recorded.

Cases

Match All

Select Filter

Select Filter Value

Add

Case Type: Therapeutic Counselling ×

No Activity ×

Assignee User: BillL ×

Enter search query

Q Search

Export

Keyword search

Added filter expressions

New Case

New Group Session

New Venue Support

Reference	Summary	Assignee	Client	Agency	Case Type	Created	Last Updated	Closed	Actions
CA-2015100396	200155 Aphra Behn Therapeutic Counselling	BillL	Aphra Behn Ronnie Wood	Victorian Responsible Gambling Foundation	Therapeutic Counselling	07/04/2015	20/05/2015		
CA-2015100306	200117 Menelaus Atreides Therapeutic Counselling	BillL	Menelaus Atreides	Victorian Responsible Gambling Foundation	Therapeutic Counselling	01/04/2015	12/05/2015		

Filter

Case Type: Therapeutic Counselling ×

Filter value

The filters

The filters include just about every attribute of cases and activities. When you select a filter, a filter values field will *sometimes* display, prompting you to specify the filter value you want to add to your query. Not all filters have subordinate filter values.



The **Select Filter** field has a long list of possible values you can select. These are separated by **grey** headings. As you get to know the values in the list you will find that the predictive search function can be your good friend here.

Match all or match any

You use the Match All / Match Any switch to indicate whether you want your search results to include **any** of the records matching your filter expressions or to match **all** of them. For example, if you have two filter expressions, one for TC cases and one for a specified user:

- ⚙ **Match All** – the search result is limited to *only* TC cases for that user
- ⚙ **Match Any** – the search results will show *all* TC cases and *all* cases of any type for that user.

Exporting a search result

If desired you can export a search result for further analysis or other work. When you click the **Export** button, *Gambler's Help Connect* downloads your search result to your computer as a *comma separated values* (.csv) file which you can then open in Excel.



The way the export will appear depends on the browser you are using at the time.

Filtering a list or search

To filter a list or search:

- 1 From the Navigation Menu select the list or search you want to filter (**Overdue**, **Incoming** or **Cases**).
- 2 In the **Select Filter** field, select the filter you want to use. Depending on your selection the **Select Filter Value** field will offer additional selection options.
- 3 **IF REQUIRED** select the filter value associated with your filter selection in step 2.
- 4 Click **Add**.
Your filter expression displays below the **Add** button.

The screenshot shows a filter interface with two dropdown menus at the top. The first dropdown is labeled 'Assignee User' and has 'BillL' selected. The second dropdown is labeled 'BillL' and also has 'BillL' selected. Below these is a blue button with a plus icon and the text 'Add'. Underneath the button is a green pill-shaped filter tile that says 'Assignee User: BillL' with a small 'x' icon to its right. At the bottom is a text input field with the placeholder text 'Enter search query'.

- 5 **IF REQUIRED** repeat steps 2-4 to add another filter expression.
The additional filter expression displays below the  button.

This screenshot shows the filter interface after adding a second filter. It has the same dropdowns as the previous one. The 'Add' button is still present. Below it are two green pill-shaped filter tiles. The first one says 'Assignee User: BillL' and the second one says 'Case Type: Therapeutic Counselling', both with 'x' icons. The 'Enter search query' field is at the bottom.

- 6 Add extra filter expressions as needed.
- 7 When you have added all the required filter expressions, click .
Your search results display in the list area of the page.



*If you want to remove a filter expression, click the **x** symbol on the filter tile.*

Filter list for client cases

The table below lists the filters you can use for client cases.

Heading	Filter
Case Type (primary)	Case type
User	Assignee user

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

Heading	Filter
Dropdown	Case type (secondary): Immediate Danger of Harm to Self/Other Relationship to Gambler Gambling Mode Gambling Type Other Non-Gambler Services Received By Age Bracket (Anon) Anonymous Gender (Anon) Reason for Contact (Anon) Services Provided (Anon) Referred By Service Awareness Referred To (external referrals) Closure Reason Treatment Stage at Closure Stage
Party	Client Agency No Client
Tags	Tags
Activity	Activity Status Activity Type Activity Subtype Activity location Activity mode Duration No Activity Party Staff
Issue	Issue Issue Outcome No Issue
Dates (intervals)	Created Updated Received Closed Started

Heading	Filter
Dates (date range)	Created Updated Received Closed Started
Catchment	Catchment
Timesheet	Direct Time (minutes) Indirect Time (minutes) Travel Time (minutes)

Filter list for community education cases

The table below lists the filters community education workers can use.

Filter group	Filter
Case Type (primary)	Case type
User	Assignee user
Dropdown	Stage
Party	Organisation Agency No Client
Tags	Tags
Activity	Activity Status Activity Type Activity Subtype Activity location Activity mode Duration No Activity Party Staff
Dates (intervals)	Created Updated Received Closed Started

Getting started with Gambler's Help Connect

LISTS, SEARCHES AND FILTERS

Filter group	Filter
Dates (date range)	Created
	Updated
	Received
	Closed
	Started

Filter list for venue support workers

The table below lists the filters venue support workers can use.

Heading	Filter
Case Type (primary)	Case type
User	Assignee user
Dropdown	Stage
Party	Venue
	Agency
	No Client
Tags	Tags
Activity	Activity Status
	Activity Type
	Activity Subtype
	Activity location
	Activity mode
	Duration
	No Activity
	Party
	Staff
Dates (intervals)	Created
	Updated
	Received
	Closed
	Started
Dates (date range)	Created
	Updated
	Received
	Closed
	Started

