

Integrated Service Cases with Gambler's Help Connect

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Audience	GH Agency managers		
Project	GHC 1606.1		
Distribution	Genevieve Endean	Manager Business Systems	Victorian Responsible Gambling Foundation
Document History			
Status	Changes	By	Date
Draft 0.1	First Draft	Bill Legge	20/6/16
Version 1.0	Release	Bill Legge	21/6/16



Contents

1	Summary	1
	Scope	1
	Who should read this document?	1
2	Managing integrated service cases	3
	About integrated service cases	4
	Creating an integrated service case	5
	Establishing a new integrated service case	5
	Defining the goals for an integrated service case	8
	Maintaining integrated service cases	11
	Case status	11
	Updating case status	12
	Closing an integrated service case	13
	Using document templates	14
3	Integrated service activities	16
	About integrated service activities	17
	Activity types and sub types	17
	Goals	17
	Recording an integrated service activity	18

1 Summary

This document describes the processes for recording integrated service cases in *Gambler's Help Connect* and for recording activities against these cases.

Scope

Integrated Service Cases with Gambler's Help Connect includes the following:

- ⚙ Creating integrated service cases
- ⚙ Defining goals for integrated service cases
- ⚙ Maintaining integrated service cases
- ⚙ Recording activities against integrated service cases.

This document *does not* include the following:

- ⚙ Business processes for:
 - negotiating goals and service plans with the foundation
 - review and endorsement of integrated service plans.

Who should read this document?

Integrated Service Cases with Gambler's Help Connect is intended for:

- ⚙ GH Agency managers for setting up and managing integrated service cases – you should use [Section 2 – Managing integrated service cases](#).
- ⚙ All members of Gambler's Help agency teams who contribute activity to integrated service cases – you should use [Section 3 – Integrated service activities](#).

2 Managing integrated service cases

Integrated service cases run annually from the start of each financial year. They record activities carried out by your Gambler's Help agency in building relationships, capacity and referral pathways among allied community organisations with respect to targeted demographics.

This section describes how to manage integrated service (IS) cases:

- ⚙ About IS cases
- ⚙ Creating an IS case
- ⚙ Recording activities for IS cases
- ⚙ Managing IS cases.



The IS Case Manager is a role in Gambler's Help Connect. Only people with that role can create or edit an IS case. However, everyone else can view the case and add activities to it.

About integrated service cases

Each integrated service case is based on a plan which is endorsed by the foundation at inception and at completion. An agency might run several integrated services (IS) cases every year. While run on an annual basis, some integrated service cases might span more than one year and can be repeated in subsequent cases in *Gambler's Help Connect*. Once an integrated service case is set up, it is visible to all *Gambler's Help Connect* users at the agency.

Each case focuses on a particular target group and the achievement of specific goals with respect to that group. Each goal is defined by objectives, actions, partnering organisations, outputs and outcomes. Each goal is subject to a six month and twelve month review which combine to comprise the six and twelve month reviews of the case itself.



While integrated service cases are nominally run on a twelve month cycle this does not mean that a case must run for twelve months. It might be that the case goal is fully achieved after three months effort. Conversely, you might find after three months that pursuing a particular goal is a waste of time.

In either of the above examples, following consultation with the foundation, you might close the case and start a new one for the remainder of the year.

Part of the planning process for an integrated service case is to estimate the number of hours of work achievement of the case goal(s) will require. These are recorded against the case as activities. Integrated service case activities are conducted under the rubric of therapeutic counselling, financial counselling, practitioner service, community education or venue support. Each activity must relate to one of the goals for the case.

Creating an integrated service case

There are two processes involved in creating an integrated service case:

- ⚙ Setting up the case itself
- ⚙ Documenting the goals that comprise the case.

Establishing a new integrated service case

To set up a new integrated service case:

- 1 From the **Operations** menu select **New Integrated Service**.
The **New Case** page displays.

New Case

Integrated Service

Target Group
Please Select

Reason for Selection
B I [List Icon] [List Icon] P H1 H2 H3

Mid year summary
4000 character(s) remaining

End of year summary
4000 character(s) remaining

Agency *
Search for agency

Expected Hours of work

Assignment

Case Manager
None

Secondary Manager
None

Activities

Status

Stage
Please Select

Closure

Closed date
dd/mm/yyyy

Receipt

Started
14/06/2016

Case Link

Case Links
Search for cases by case id

Unlink this case
☐

Buttons: Save Save and Close Cancel

Integrated Service Cases with Gambler's Help Connect

MANAGING INTEGRATED SERVICE CASES

2 In the **Integrated Service** section:

- ⚙ In the **Target Group** field, select the demographic who will be the focus of this case.



*If you select **Other** a free text field displays for you to enter the demographic that will be the focus of this case.*

- ⚙ In the **Reason for Selection** enter the rationale underpinning your agency selection of this demographic as the focus for this new case.
- ⚙ In the **Agency** field, select your agency.
- ⚙ In the **Expected Hours of Work** field, enter the total number of hours expected to be worked by agency staff on this case.

3 In the **Assignment** section:

- ⚙ In the **Case Manager** field, select the person who will have carriage of the case.
- ⚙ Optionally, in the **Secondary Manager** field, select a second case manager.

4 In the **Status** section, in the **Stage** field, select **Plan In Progress**.

5 Click .
The case details page displays.

IS-2016100707
Aboriginal and Torres Strait Islander Communities

Details
Activities
Documents
Templates
Audit Log

▼ Summary

Stage:
Status:
Expected Hours of work:
Target Group

Plan Complete
Open
150
Aboriginal and Torres Strait Islander Communities

▼ Closure

▼ Dates

Created:
Updated:
Received:
Started:
Latest Stage Change:

11 days ago on 03/06/2016 15:16
5 days ago on 09/06/2016 13:10
12 days ago on 03/06/2016
12 days ago on 03/06/2016
11 days ago on 03/06/2016 15:16

▼ Reason for Selection

- Research highlights that aboriginal people are especially vulnerable to gambling related harm. Aboriginal people gamble more frequently than the non-aboriginal populations (FAHCSIA, 2011).
- Maribyrnong (0.5%), Hume (0.6%), and Melton (0.7%) have indigenous populations equal or higher than the greater Melbourne average (0.5%). ABS, Census of Population and Housing, 2011)

▼ Activities (0)

There are no activities added for this case

> Goals (2)

Users and Groups

Created By:
Case Manager:
Secondary Manager:

SandraT
SandraT

Assigned to Agency:
Banyule - West Heidelberg

Linked Cases

[Link a new Integrated Service](#)

Edit
Print

Defining the goals for an integrated service case

Having set up a new case, the next procedure is to define the goal(s) people working on the case intend to achieve. Typically, an integrated service case will have a single goal, although there might be cases where two goals might be considered appropriate. A goal can have multiple objectives.

You specify goals on the **Details** tab of the case record:

- 1 Click  next to the **Goals** section of the page.
*The **Goal Details** page displays.*



IS-2016100739
Aboriginal and Torres Strait Islander Communities

Goal Details

Goal *

Assist Individuals to Manage Gambling Related Harms

Objectives

Improve understanding within the ATSI community of the nature of gambling related harms and strategies they can use to minimise these.

3988 character(s) remaining

Actions

Targeted education sessions with ATSI providers.
Participate in network meetings with ATSI services workers..
Develop local memorandum of understanding (MOU) for secondary consultations and referrals from local ATSI services providers.

3765 character(s) remaining

Partnering Organisations

Aboriginal and/or Torres Strait Islander Provider

Outputs

10 education sessions delivered and evaluated
10 network meetings attended
MOU developed

3912 character(s) remaining

Outcomes

Increased understanding, knowledge and ability by 75% of professionals to help clients develop strategies to manage gambling related harms
MOU implemented and ATSI workers identify and respond to clients that experience gambling related harms
Secondary consultations and referrals with ATSI service providers

3892 character(s) remaining

6 month Review

Please Select

6 month Review Notes

4000 character(s) remaining

End of Year Review

Please Select

End of Year Review Notes

4000 character(s) remaining

Save
Cancel

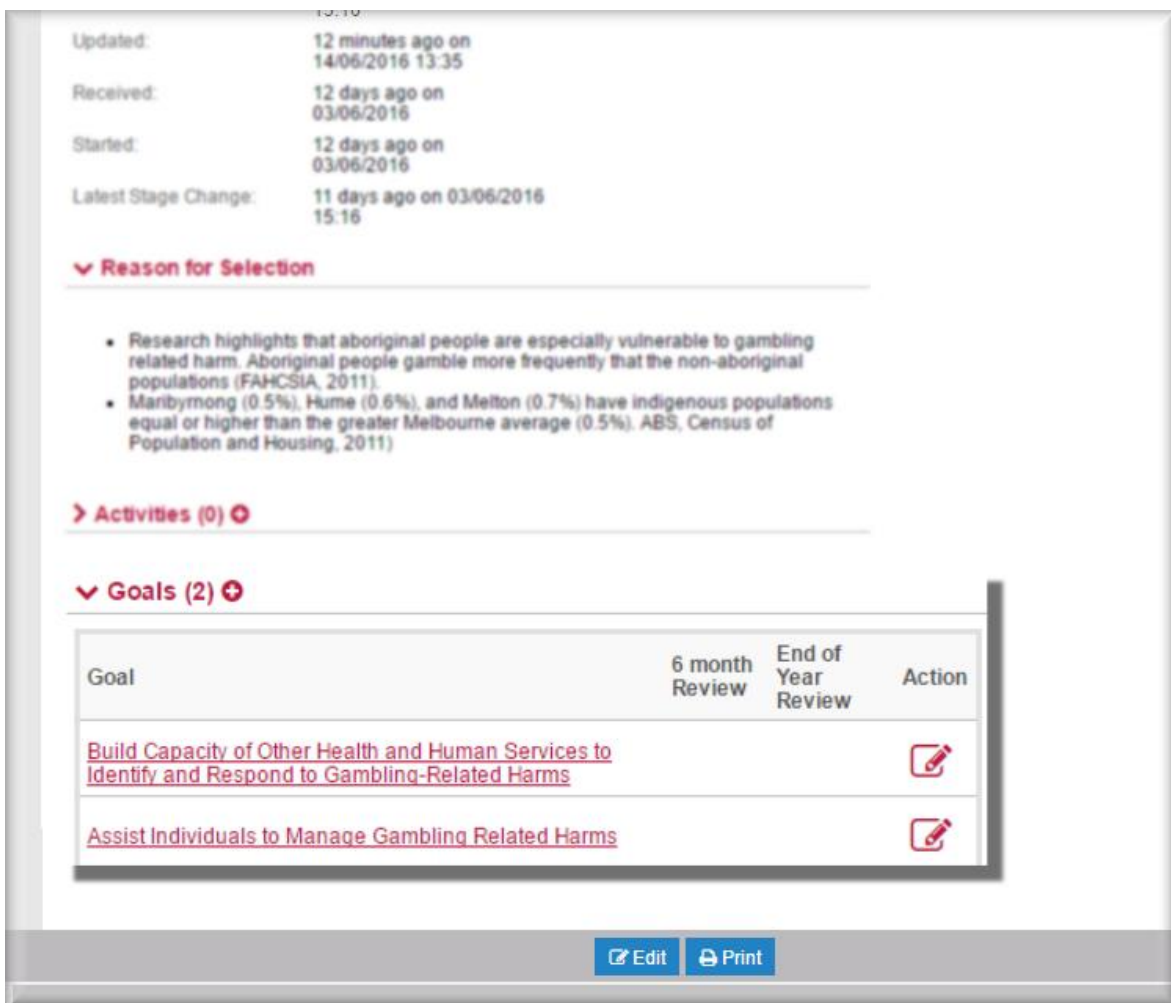
2 In the **Goal** field,  select the goal.

3 In the **Objectives** field, enter the objectives to be achieved in pursuit of this goal.

Integrated Service Cases with Gambler's Help Connect

MANAGING INTEGRATED SERVICE CASES

- 4 In the **Actions** field, enter the actions that will contribute to meeting the objectives for this goal.
- 5 In the **Partnering Organisations** field,  select the organisation type (or organisations) with whom you intend to work in pursuing this goal.
- 6 In the **Outputs** field, enter the outputs that quantify the actions your agency will undertake in pursuit of this goal.
- 7 In the **Outcomes** field, enter the outcomes you anticipate will come from the actions you will take in pursuit of the goal.
- 8 Click  **Save**.
The **Details** tab of the case page displays with the goal now added to the list.



Updated: 12 minutes ago on 14/06/2016 13:35

Received: 12 days ago on 03/06/2016

Started: 12 days ago on 03/06/2016

Latest Stage Change: 11 days ago on 03/06/2016 15:16

Reason for Selection

- Research highlights that aboriginal people are especially vulnerable to gambling related harm. Aboriginal people gamble more frequently than the non-aboriginal populations (FAHCSIA, 2011).
- Maribymong (0.5%), Hume (0.6%), and Melton (0.7%) have indigenous populations equal or higher than the greater Melbourne average (0.5%). ABS, Census of Population and Housing, 2011)

Activities (0)

Goals (2)

Goal	6 month Review	End of Year Review	Action
Build Capacity of Other Health and Human Services to Identify and Respond to Gambling-Related Harms			
Assist Individuals to Manage Gambling Related Harms			

 **Edit**  **Print**

- 9 Repeat these steps to add all the required goals for this case.
The IS case is ready for review and endorsement from the foundation.

Maintaining integrated service cases

Having created an integrated service case, you update the goal(s) and the case as it goes through periodic reviews.

Case status

Each integrated service case is an element of your annual plan. The statuses of your IS cases reflect the collaborative planning and review you do with the foundation. As your integrated service cases progress through this process, you update their status accordingly.

Case Stage	Explanation
Plan In Progress	Plan is under development
Plan Complete	Plan ready for VRGF endorsement
Plan Endorsed	Plan endorsed by VRGF
6mth Review Complete	Half year review ready
6mth Review Endorsed	Half year review endorsed by VRGF
12mth Review Complete	End of year review ready
12mth Review Endorsed	End of year review endorsed by VRGF
Completed	Case closed.

Goal status

Goals have four possible statuses which are ascribed to them at the six and twelve month reviews. For the six month review, these are:

- ⚙ On Track
- ⚙ Not On Track
- ⚙ Achieved
- ⚙ Discontinued.

For the end of year review these are:

- ⚙ Discontinued
- ⚙ Not Achieved
- ⚙ Partially Achieved
- ⚙ Achieved.

Integrated Service Cases with Gambler's Help Connect

MANAGING INTEGRATED SERVICE CASES



It's not necessary to wait for the six or twelve month reviews to define a goal as achieved or discontinued should this be an accurate reflection of the goal status.

Updating case status

Your integrated service cases go through a process of periodic reviews from inception to closure. You document these by changing the status of the case in the **Stage** field, and, for the mid-year and end-of-year reviews, entering a brief summary of the progress of the case.

- 1 From the **Operations** menu select **Our Integrated Service Cases**.
The integrated service case list for your agency displays.
- 2 Click  to edit the case.
The case displays in view mode.
- 3 Click .
The case opens for editing.
- 4 In the **Status** section in the **Stage** field,  select the stage for the case.
- 5 **IF** the status change is for the six or twelve month review, enter your notes in the **Mid year summary** or **End of year summary** fields.



There is a 4000 character limit on these fields, which equates to about 350 words.

- 6 Click .

Updating goal status

Since the substance of your periodic case review is derived from your progress in achieving goal objectives, you should update your case goal(s) at the same time you update the case status.

- 1 From the **Operations** menu select **Our Integrated Service Cases**.
The integrated service case list for your agency displays.
- 2 Click the **Reference** link to open the case.
The case displays in view mode.
- 3 Expand the **Goals** section to view the goal list.

Integrated Service Cases with Gambler's Help Connect

MANAGING INTEGRATED SERVICE CASES

Reason for Selection

People from culturally and linguistically diverse communities are disproportionately impacted by harmful gambling behaviours and more isolated from help and support resources than people in the English speaking community. The financial, social and criminal impacts of gambling harms upon families in these communities can often be more severe and persistent than for those in the wider community.

Working actively to create and maintain links between our service and allied services in the CALD sector is a key strategy to improving access to and utilisation of our programs by affected members of these communities.

Activities (4)

Goals (4)

Goal	6 month Review	End of Year Review	Action
Assist Individuals to Reduce or Stabilise Gambling Behaviours			
Assist Individuals to Manage Gambling Related Harms			

- Click next to the goal you want to update.
The goal opens for editing.
- Depending on where you are in the review cycle, in the **6 month Review** or **End of Year Review** field, select the goal status.
- Enter your review notes in the relevant field.



There is a 4000 character limit on these fields, which equates to about 350 words.

- Click **Save**.
Goal status is updated.

Closing an integrated service case

You close integrated service cases at the end of the financial year, or when case goals are met (or abandoned), whichever comes first.



*When you close an integrated service case, it no longer displays in the **Our Integrated Service Cases** list – although it can be located using a case search. Hence, you are strongly advised to check thoroughly that your team have all recorded all their activities against this case before you close it.*

- From the **Operations** menu select **Our Integrated Service Cases**.
The integrated service case list for your agency displays.
- Click the **Reference** link to open the case.
The case displays in view mode.

Integrated Service Cases with Gambler's Help Connect

MANAGING INTEGRATED SERVICE CASES

- 3 Click  **Edit**.
The case opens for editing.
- 4 In the **Status** section in the **Stage** field,  select **Completed**.
- 5 In the **Closure** section in the **Closed date** field,  select the closure date.
- 6 Click  **Save and Close**.
The case is closed.

Using document templates

The **Templates** tab of the case record provides a series of document templates you use to create print copies of your integrated service plan, mid year and end of year reports. These are generic documents common to all local services. The templates extract relevant information from the case to populate the document, including, goals, objectives, actions, outputs, outcomes and your evaluation.



The templates DON'T aggregate your IS cases into a single report. You need to generate a copy for each of your integrated service cases.

The templates you can use are:

- ⚙ **Integrated Service Plan** – generates a copy of your integrated service plan, including all goal details, for submission to and endorsement by the foundation.
- ⚙ **Midyear report** – generates a copy of your mid year report, including all goals details and your evaluation, for submission to and endorsement by the foundation.
- ⚙ **End of year report** – generates a copy of your mid year report, including all goals details and your evaluation, for submission to and endorsement by the foundation.



Should you identify a requirement for new templates, or changes to existing templates, talk to your manger or the help desk reference group member at your agency or your manager.

Generating a template document

To generate a template document:

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

IS-2016100753

Culturally and linguistically diverse communities

Details

Activities

Documents

Templates

Audit Log

Generate new document from template

Template name	Version of template	Template file name	Action
Midyear Report	1.5	Midyear report.docx	
Integrated Service Plan	1.4	Integrated Service Plan.docx	
End of year Report	1.8	End of year report.docx	

Documents previously generated

Generated at	Generated by	Template name	Template version	Populated with party	File name
20/06/2016 08:05:07	Bill Legge	Integrated Service Plan	1.3	N/A	IS-2016100753_Integrated Service Plan.docx

- 3 In the **Action** column of the list click  for the template you want to use.
*A document based on the template displays in the **Documents previously generated** list.*
- 4 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.

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

3 Integrated service activities

This section describes how to record activities against integrated service cases. While the procedure is very similar to that for recording activities against client, venue support or community education cases, there are some points of difference that you need to be aware of.

About integrated service activities

Except for the case manager and secondary manager, no-one else has edit rights to an integrated service case record – you can view, but not edit. Each integrated service case is focused on a target group. Your agency will generally have between four and six integrated service cases per year, representing the work you do for and with these target groups.

Activity types

Since all members of your Gambler's Help agency team might contribute activities to an integrated service case, the activity record in *Gambler's Help Connect* reflects this. When you record an activity, you specify an **Activity Type** which reflects your service role. For example, if you are a therapeutic counsellor, your activity type is therapeutic counselling. Where you have more than one role, for example, you provide both therapeutic counselling and community education services, the activity type you specify represents the hat you were wearing at the time you conducted the activity.



*You can only specify a single activity type in an integrated service activity record. This means where more than one of you participated in an activity you can get away with a single record if all of you had the **same** activity type, but if you had **different** activity types, you will each need to record a separate activity.*

Goals

Each integrated service case will have one (or possibly two) **goals**. These are defined by objectives, actions, outputs and outcomes. All integrated service case activities are directed at meeting the objectives of the case goal.

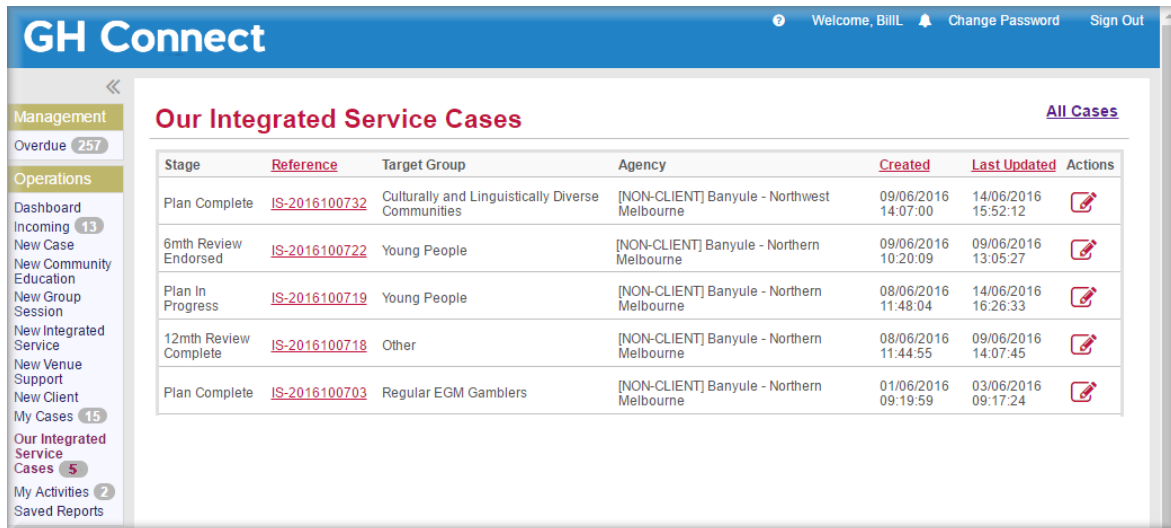
Integrated Service Cases with Gambler's Help Connect

INTEGRATED SERVICE ACTIVITIES

Recording an integrated service activity

All members of a Gambler's Help agency team can record activities against integrated service cases. The process is similar to recording other types of activities in *Gambler's Help Connect*:

- 1 From the **Operations** menu select **Our Integrated Service Cases**.
The integrated service case list for your agency displays.



Stage	Reference	Target Group	Agency	Created	Last Updated	Actions
Plan Complete	IS-2016100732	Culturally and Linguistically Diverse Communities	[NON-CLIENT] Banyule - Northwest Melbourne	09/06/2016 14:07:00	14/06/2016 15:52:12	
6mth Review Endorsed	IS-2016100722	Young People	[NON-CLIENT] Banyule - Northern Melbourne	09/06/2016 10:20:09	09/06/2016 13:05:27	
Plan In Progress	IS-2016100719	Young People	[NON-CLIENT] Banyule - Northern Melbourne	08/06/2016 11:48:04	14/06/2016 16:26:33	
12mth Review Complete	IS-2016100718	Other	[NON-CLIENT] Banyule - Northern Melbourne	08/06/2016 11:44:55	09/06/2016 14:07:45	
Plan Complete	IS-2016100703	Regular EGM Gamblers	[NON-CLIENT] Banyule - Northern Melbourne	01/06/2016 09:19:59	03/06/2016 09:17:24	

- 2 Click the [Reference](#) link to the case you want to record an activity for.
The Case Details page displays.

IS-2016100732
Culturally and Linguistically Diverse Communities

Details
Activities
Documents
Templates
Audit Log

Summary

Stage: Plan Complete
Status: Open
Expected Hours of work: 150
Target Group: Culturally and Linguistically Diverse Communities

Closure

Dates

Created: 6 days ago on 09/06/2016 14:07
Updated: about 3 hours ago on 15/06/2016 07:58
Received: 6 days ago on 09/06/2016
Started: 6 days ago on 09/06/2016
Latest Stage Change: 6 days ago on 09/06/2016 14:07

Reason for Selection

People from culturally and linguistically diverse communities are disproportionately impacted by harmful gambling behaviours and more isolated from help and support resources than people in the English speaking community. The financial, social and criminal impacts of gambling harms upon families in these communities can often be more severe and persistent than for those in the wider community.

Working actively to create and maintain links between our service and allied services in the CALD sector is a key strategy to improving access to and utilisation of our programs by affected members of these communities.

Activities (4)

Goals (4)

Users and Groups

Created By: CE_ISIS2
Case Manager: GenevieveE
Secondary Manager: GraceK
Assigned to Agency: [NON-CLIENT] Banyule - Northwest Melbourne

Linked Cases

[Link a new Integrated Service](#)

- In the **Activities** section click .
The activities details page for the case displays.

Integrated Service Cases with Gambler's Help Connect

INTEGRATED SERVICE ACTIVITIES

IS-2016100732

Culturally and Linguistically Diverse Communities

Activity Details

Activity Type *

Therapeutic Counselling

Activity Sub Type

Please Select

Goal *

Build Capacity of Other Health and Human Services to Identify and Respond to Gambling-Related Harms

Number of Participants

4

Plan Mode

Education - Group

Partnering Organisations

Culturally and Linguistically Diverse Provider

Organisation Name

Antonio Gramsci Social Justice Syndicate

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

Bill Legge (BILL) x

Previous notes (read only)

New notes

B I

P H1 H2 H3

Collaborative workshop in recognition and response techniques.

Location

Gambler's Help Secondary Site

When

14/6/2016 10:00

Activity Duration (H:M)

02:00

Status

Completed

Upload Document

Choose file No file chosen

Reminders

Add new reminder

Restrict View & Edit To

None

Timesheet

Staff	Notes	Start Time	Staff Time	Travel Time	Total Time	Delete
Bill Legge (BILL)	IS-2016100732 -	15/06/2016 07:35	02:00	00:00	02:00	

Save Save and Close Cancel

4 In the **Activity Type** field,  select your activity type, from:

- ⚙ **Community Education**
- ⚙ **Financial Counselling**
- ⚙ **Therapeutic Counselling**
- ⚙ **Venue Support**
- ⚙ **Practitioner.**

5 In the **Goal** field, select the case goal to which this activity relates.

6 **IF** relevant, enter the number of participants in this activity.



In some activities, for example, preparation for a presentation or attending a network meeting, the number of participants might not be reportable. In others, such as facilitating an education session for other service providers, the number of participants will be of considerable importance.

7 In the **Plan Mode** field, select from:

- ⚙ **Education – Group**
- ⚙ **Education – Individual**
- ⚙ **Event/Forum**
- ⚙ **Networking/Committee Working Group**
- ⚙ **Presentation**

8 **IF** the activity relates to organisations you are working with, in the **Partnering Organisations** field select the organisation type. This is a multi-select field so you can include more than one organisation type.

9 **IF** you worked with partnering organisations for this activity, in the **Organisation Name** field, enter the name of the organisation.



If there is more than one organisation, just enter each name separated by a comma.

10 The **Staff** field defaults with the names of the case manager and secondary manager, delete these if necessary and select the name(s) of the staff who did the activity.

11 In the **New Notes** field, enter your summary notes about the activity.

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

13 In the **When** field, select the date and time of the activity.

14 In the **Activity Duration (H:M)** field specify the duration of the activity.



Duration includes any preparation or follow up time associated with the activity as well as the time for the activity itself. For example, if you spent an hour preparing for a training session, an hour delivering training and another hour evaluating the session, the activity duration would be three hours. Travel time is recorded separately.

15 In the **Status** field, select **Completed**.
The timesheet displays.

16 In the time sheet, adjust the values in the **Staff Time** and **Travel Time** columns for each staff member as necessary.

- 17 Click .
The activity is saved to the case.

Scheduling integrated service case activities

You can schedule a future integrated service case activity as for other activities. When you do this *Gambler's Help Connect* will prompt you with a reminder 24 hours before the scheduled activity. You don't need to complete all the details for a scheduled activity since you can add these when you complete the activity later:

- 1 Open the case and then click  to open a new activity page.
- 2 Enter or select the relevant values for:
 - ⚙ **Activity Type**
 - ⚙ **Goal**
 - ⚙ **Plan Mode**
 - ⚙ **Staff**
 - ⚙ **Location**
 - ⚙ **When**
 - ⚙ **Activity Duration (H:M).**
- 3 Leave the **Status** field unchanged. (Scheduled status is **Opened**).
- 4 Click .



To add a new reminder click  and then specify the reminder date and time you want.