Connect for practitioners

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	practitioners at Gambler's Help In-language and Aboriginal services		
Project	GHC 1606.1		
Document ID	**Error! Unknown document property name.**–		
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 1606.1	First Draft	Bill Legge	28/6/16

Contents

1 Summary

This document describes the procedures used by practitioners at Gambler’s Help In-language and Aboriginal services in *Gambler’s Help Connect* to record and manage client, case and activity information.

Scope

Connect for practitioners includes the following:

- Key concepts for practitioner to understand about *Gambler’s Help Connect*
- Creating case and client records
- Recording activities
- Managing cases.

Who should read this document?

Connect for practitioners is intended for practitioners at Gambler's Help In-language and Aboriginal services.

2 Introduction

This document describes the procedures used by Gambler's Help practitioners at In-language and Aboriginal services to record their activities in *Gambler's Help Connect*. It covers:

- Key concepts for practitioners
- How to create client and case records:
  - Cases for people with a client record
  - Cases for people who don't want to have their details recorded
  - Cases for families and groups
  - How to refer people on to other Gambler's Help services
  - How to record a recovery assistance program (RAP) payment
- How to manage cases:
  - Recording clients' issues
  - Attaching documents to cases records
- How to record your activities
- How to close your cases.

To learn the basics of using Gambler's Help Connect how to read the information in it, see How to use Gambler's Help Connect

Key concepts for Gambler's Help practitioners

Gambler's Help practitioners help people who come to In-language or Aboriginal services.

There are some things you should understand about *Gambler's Help Connect* before you start using the system:

- Case and client records
- Referrals from the Gambler's Helpline to your service
- The different types of cases and when you use them.

Client and case records

In *Gambler's Help Connect* you create, edit and update client and case records.

Depending on how a person comes to you for help, and what help they want, you might need to add or update information about:

- The **client**, including:
  - Who they are
  - *If*, *how* and *when* they want you to contact them
  - Where they live
  - *Tags* – specific information about the client that anyone working with the record should know about, for example, a disability
  - Additional demographic information
  - Reference to justice clients
  - Details of any deeds of self-exclusion.
- The **case**, including details relating to:
  - Gambling
  - Debt
  - The issues
  - How the person came to your service, if you referred them on to other services and any other services the client might be working with at the time.

Some clients might not be comfortable with you recording their personal details. When this happens you can create an *anonymous case* recording information about:

- Age, gender and postcode
- Why they called and what you did for them
- Whether you offered them a referral to a local service or why this wasn't appropriate.

When you process a referral there is a minimum amount of information you must record, but the more you can record, the better you help the client's intake and the better you help your colleague(s) help your client. Importantly, you save the client from having to tell their story over and over again from the beginning.

The single client record

In *Gambler's Help Connect* every client has a unique record. When you record a client record, counsellors at the Gambler's Helpline and at local Gambler's Help services can use this record if the client comes to them for help.

You can *see whether a client has current or closed cases in other agencies but you* can't *see what activities were done in those cases or the case notes. If a client has received Recovery Assistance Program (RAP) funding in the last twelve months at a local service you can see how much they have received.*

Practitioner cases

If you are a Gambler's Help practitioner at an in-language or Aboriginal service there are two type of cases you use in *Gambler's Help Connect*:

- **Practitioner** case – where you work with a person, family or a group of people who have consented for you to record their personal details in the system (that is, they have a client record).
- **Anonymous** case – where you work with a person, family or a group of people who have *not* consented for you to record their personal details in the system (that is, they *don't* have a client record).

Practitioner referrals

People can follow different pathways when they come to your service for help. They might come because they saw an advertisement or at the suggestion of a friend. They might also be referred to you from another Gambler's Help service. In *Gambler's Help Connect* it's important that you recognise and record just how the person came to you.

Likewise, you might also refer people on to other services, including other Gambler's Help services. You also record referrals on in *Gambler's Help Connect*.

Practitioner inward referrals

These are the main ways people might come in to your service:

- **Self referral** – a person comes to you for help with gambling problems, perhaps after they saw an advertisement for Gambler's Help or someone they knew suggested it. *The person might or might not have a* Gambler's Help Connect *record, and it's up to you to create the right sort of case for them in the system.*
- **Callback** – a person calls the Gambler's Helpline or a local service and decides they would like to receive a call from a worker at your service. *The referring service records a client and a callback case in the system. It displays in your* **Incoming** *list in* Gambler's Help Connect*.*
- **Practitioner referral** - a person calls the Gambler's Helpline or a local service and decides they would like to see a worker at your service. *The referring service records a client and a practitioner case in the system. It displays in your* **Incoming** *list in* Gambler's Help Connect*.*

When you get an incoming referral from the Helpline or a local service make sure you check that the case type is ***Practitioner****. You can change the case type if necessary.*

Practitioner outward referrals

When working with a client you might also refer them on to other services:

- **External referral** – you connect the person with other services or agencies outside Gambler's Help. *You record this in their* Gambler's Help Connect *case record*.
- **Gambler's Help referral** – you connect the person with another Gambler's Help agency for a program or service you don't provide, perhaps the person needs some Recovery Assistance Program (RAP) funding. *You create a new case record for the person in* Gambler's Help Connect *and assign it to the agency where you want them to go. The new case displays in the* **Incoming** *list at that agency and the intake worker will contact the client and take it from there.*

There is nothing to stop you following up an outward referral with a phone call. If you do this, you record an activity against their case at your service. You would only do this if your client has given their consent.

3 Creating practitioner case and client records

In *Gambler's Help Connect* every client record should be associated with at least one case record.

This section describes how you create the different types of cases in *Gambler's Help Connect*:

- Practitioner cases
- Callback cases
- Anonymous cases
- Group cases.

If your In-language or Aboriginal service has a Recovery Assistance Program see *Recovery Assistance Program cases* *for information about how you process these.*

Practitioner cases

In *Gambler's Help Connect* there are a number of different ways you can create new practitioner case records depending on whether the client has a case history.

Where clients have a case history at *another* agency you can identify the counsellor and agency for the client record and can, if appropriate (and your client consents), contact your colleague(s) at that agency for background information.

View a demonstration of how to create a new case for a new client

Creating a practitioner case for a new client

When you create a case for a new client you must create the client record *as well as* the case record. The best approach is to start the new case, then add the client record and then complete the case.

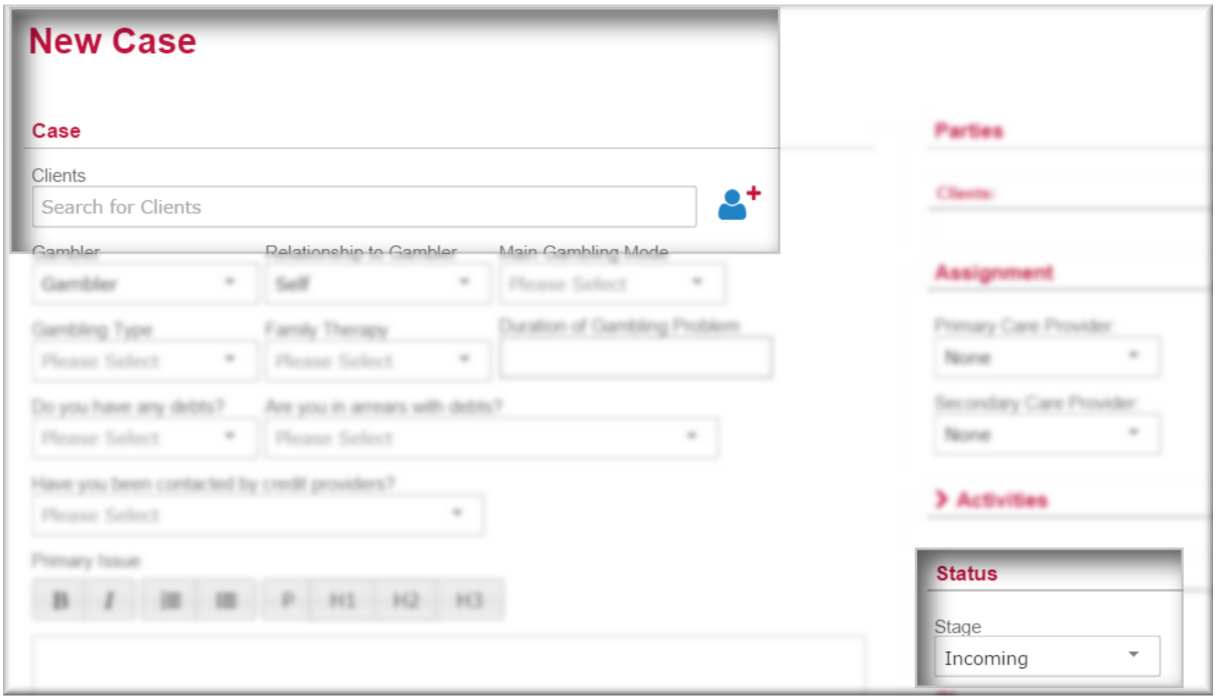
View a demonstration of how to [create a new case for a new client](#).

Whenever you begin a new practitioner case you should start with a client search.

See [Searching for a client record](#) if you're not sure how to do this.

Having established the client has no client record in the Gambler's Help program:

1 From the **Operations** menu select **New Case**.
The **New Case** *screen displays.*



2 On the **New Case** page, in the **Clients** field, enter the client's name and then click .
The **Case> New Individual as Client** *page displays. This page is an overlay on the case page.*

Create the client record

At the least you should record client identity and contact information. The client page has five sections:

- *Client identity and contact preferences* – where you specify the client's identity details and their contact preferences and expectations.

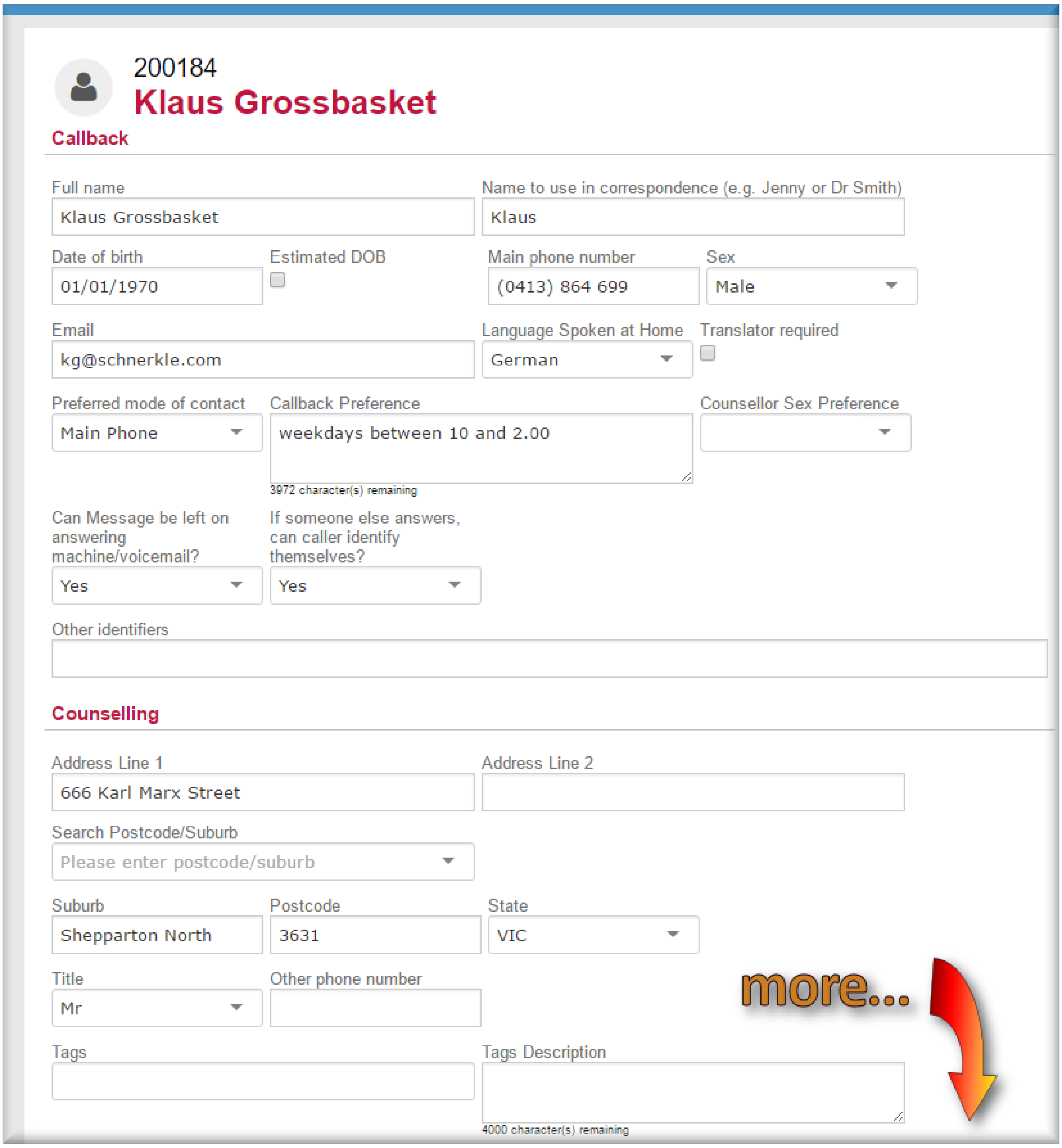
  You must complete this section for practitioner and callback cases.

- *Counselling* – where you specify the client's address details for practitioner clients as well as optionally including tags to alert people using this client record about details, such as a disability.
- *Other demographic information* – where you specify demographic and socio-economic descriptors of practitioner clients.
- *Justice clients* – where you specify relevant details of clients referred to the program from the justice system, such as a client referred as part of a community corrections order.
- *Self exclusions* – where you specify details of any current self exclusion deeds the client might have.

  The image of this screen (below) is cut into slices so it fits on the page!

Identity and contact preferences

In the first part of the client record you record the person's identity and contact preferences including how and when they want to be contacted. It is very important that you complete this section fully.



1 Enter the client's identity details:

- **Full Name**
  *The **Name to use in correspondence** defaults the given name from your entry in this field, you can change it if appropriate. This is the name that displays in template letters and SMS reminders.*

Where clients are known by more than one name, such as a maiden name and a married name, or where they have alias names, just enter each name separated by a comma. Any of these will then show up in a search.

- **Date of Birth**
  Select the **Estimated DOB** *checkbox where you are not able to specify the date of birth with full confidence.*
- **Main Phone Number** – this can be a landline or mobile number. If the client wants to receive SMS reminders of appointments it must be a mobile number.
- **Sex**
- **Email**
- **Language Spoken at Home**.

2 Specify the client's contact preferences. This is really important information for clients with any case type.

- **Preferred mode of contact**
- **Callback Preference** - enter the client's preferred times and days for contact.
- **Counsellor Sex Preference** select the client's preference.
- **Can Message be left on answering machine/voicemail**
- **If someone else answers, can caller identify themselves?**

Counselling

The next section of the page is **Counselling**. You use this section of the page to record the client's address details for practitioner cases and to add any relevant tags.

3 In the **Search Postcode/Suburb** field, enter the postcode or suburb for the client and then select the suburb that displays.
The **Suburb**, **Postcode** *and* **State** *fields all default from your selection.*

4 Optionally, add:

- The client's street address in the **Address Line 1** field.
- The client's preferred **Title**.
- An alternate phone number in the **Other phone number** field.

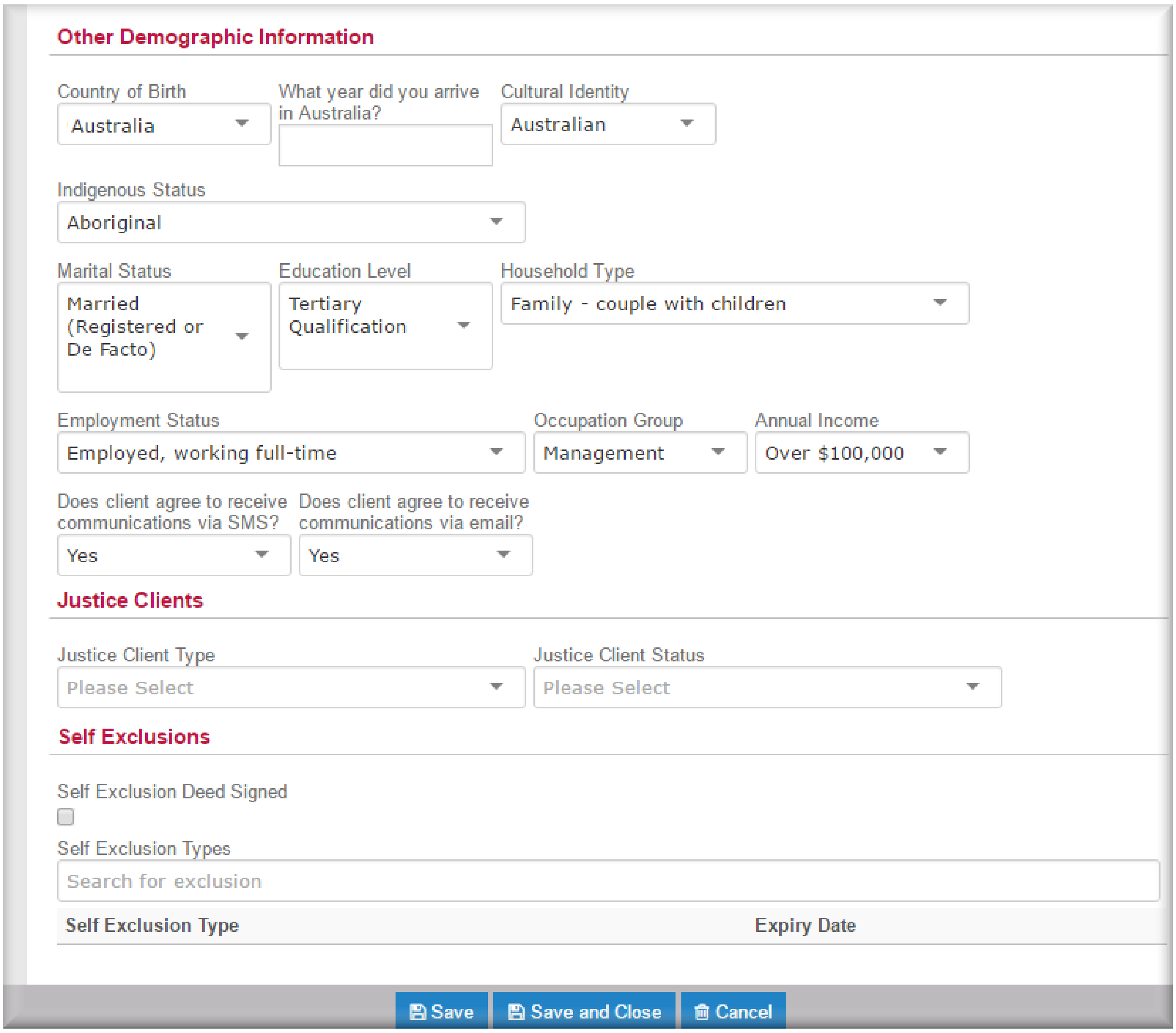
5 Optionally, in the **Tags** field select a tag to apply to the client record and then, in the **Tags Description** field enter a brief description.

Don't forget that tags on the client record, can be seen by Gambler's Help Connect *users with a practitioner, therapeutic counsellor, financial counsellor or telephone counsellor profile.*

Other demographic information

The next section of the page is **Other Demographic Information** you use this section to describe the demographic profile of the client.

This information might not all be available when you first meet the person and you might not be able to record all of it for every client. However, the information you record in this section is really important in helping us to understand the people who seek help.



6 Complete the clients ethnicity details:

- **Country of Birth**
- **Cultural Identity**
- **Indigenous Status**.

7 Complete the client's family details:

- **Marital Status**
- **Household Type**.

8 Complete the client's employment and education details:

- **Education Level**
- **Employment Status**
- **Occupation Group**

- **Annual Income**.

9 Complete the client's communication preferences for appointment reminders:

- **Does the client agree to receive communications via SMS?**
- **Does the client agree to receive communications via email?**

You must record a mobile number as the main phone if the client is to receive SMS reminders.

Justice Clients

The next section of the page is **Justice Clients**. You use this section to record details of clients who have been referred to the program from the justice system.

10 **IF** the client was referred from the justice system, specify:

- **Justice Client Type**, the program from which they have been referred
- **Justice Client Status**.

Self exclusions

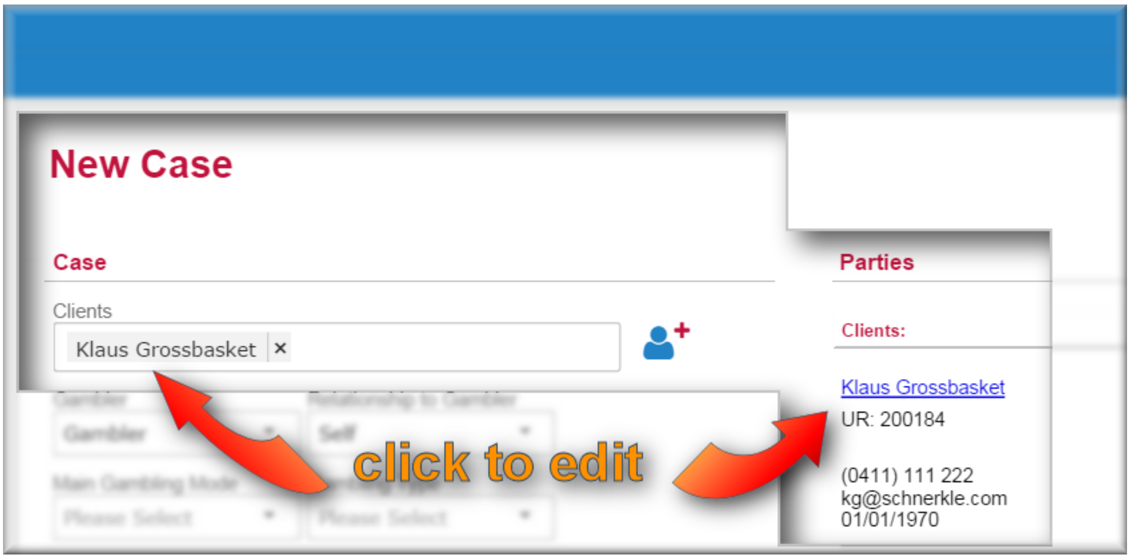
The next section of the page is **Self Exclusions**. You use this section to record details of any self exclusion deeds for the client.

11 **IF** the client has a current deed of self exclusion:

- select **Self Exclusion Deed Signed**.
- **Self Exclusion Types** – use the predictive search to select either AHA or Crown and then enter the expiry date for the deed.

Save the client record

12 When you have completed all the relevant sections of the page, click Save.
The client page closes and the case page displays.



*The client's name now displays in the **Clients** field and a link to the client record also displays under the **Parties** heading. You can return to the client page at any time by clicking either of these links.*

Complete the practitioner case record

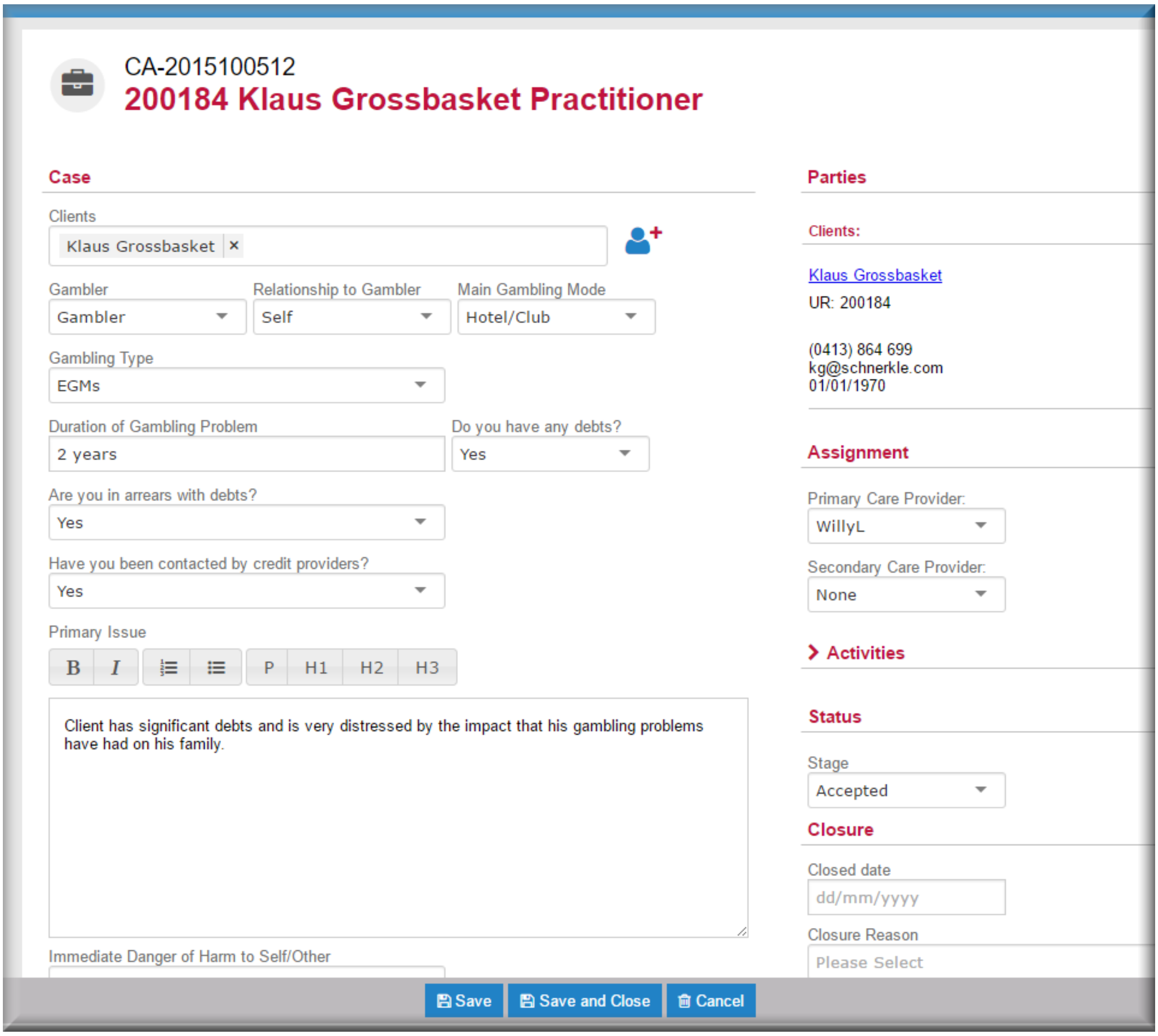
When you save the new client details you return to the case page to complete the case. The case page has twelve sections – not all of which apply to all cases:

- **Case** – where you specify:
  - The nature of the client's gambling and debt issues
  - The primary issue(s) motivating the client's presentation
  - Risk assessment of the potential for harm to self or other
  - Case type
  - Agency where the case is to be located.
- **Anonymous** – where you specify details relating to anonymous cases.
- **Counselling** – where you describe the client's trajectory toward the referral.
- **External Referral** – where you specify details of any facilitated referrals to other non - Gambler's Help services you have made for the client.
- **Add Issues** – where you identify other client issues – additional to the primary issue.
- **Assignment** – where you assign a primary care provider and optionally a secondary care provider to the case.
- **Activities** – where you have the option of scheduling activities for the case.
- **Status** – where you specify the case stage.
- **Closure** – where you specify case closure details.
- **Receipt** – where you specify key details of the referral mode.
- **Case Link** – where you have the option of linking this case to another case or cases in this agency.

Case

In the **Case** section of the page you complete the key details defining the case.

Note that the client name displays as a tile in the ***Clients*** *field. You can click this at any time during the case creation process to open the client page to add or change details.*



1 Specify the gambling attributes of the case:

- **Gambler**
- **Relationship to Gambler**
- **Main Gambling Mode**
- **Gambling Type**
- **Duration of Gambling Problem**.

2 Specify debt details:

- **Do you have any debts?**
- **Are you in arrears with debts?**

Have you been contacted by credit providers?

3 In the **Primary Issue** field, summarise the presentation.

You can enter up to 4000 characters into this field – 500 words or thereabouts. Should you need to include a lengthier description of the primary issue(s) consider attaching a Word document to the case. See Managing documents for practitioner cases for more information about how you do this.

4 Choose an option:

If…	Then
…you have identified risk issues	○ select **Yes** in the **Immediate Danger of Harm to Self/Other** field ○ Describe the risks in the **Details of Danger & Response Provided** field
…you have identified no risk issues	○ select **No** in the **Immediate Danger of Harm to Self/Other** field
…you aren't sure whether there are risk issues l	Leave the **Immediate Danger…** field blank and return to it later when you have more information.

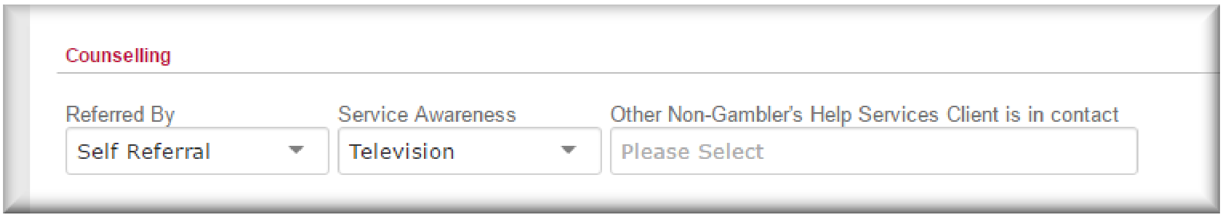
5 In the **Case Type** field select **Practitioner**.

*See Working with families in practitioner cases for details on how to use the **Family Therapy** field.*

6 In the **Agency** field, select your agency.

Counselling

In the **Counselling** section you provide details of how the client came into contact with the Gambler's Help program and whether they are in contact with other services or programs.



1 In the **Referred By** field, select the source of the referral.

2 In the **Service Awareness** field select how the client knew about the service.

3 **IF** the client is in contact with another service or program, select the service type in the **Other Non-Gambler's Help Services Client is in contact** field.

*Don't confuse the **Referred By** field where you record how the client learned about the service (and that it might be helpful to them personally), with the **Received By** field where you record how this referral was initiated.*

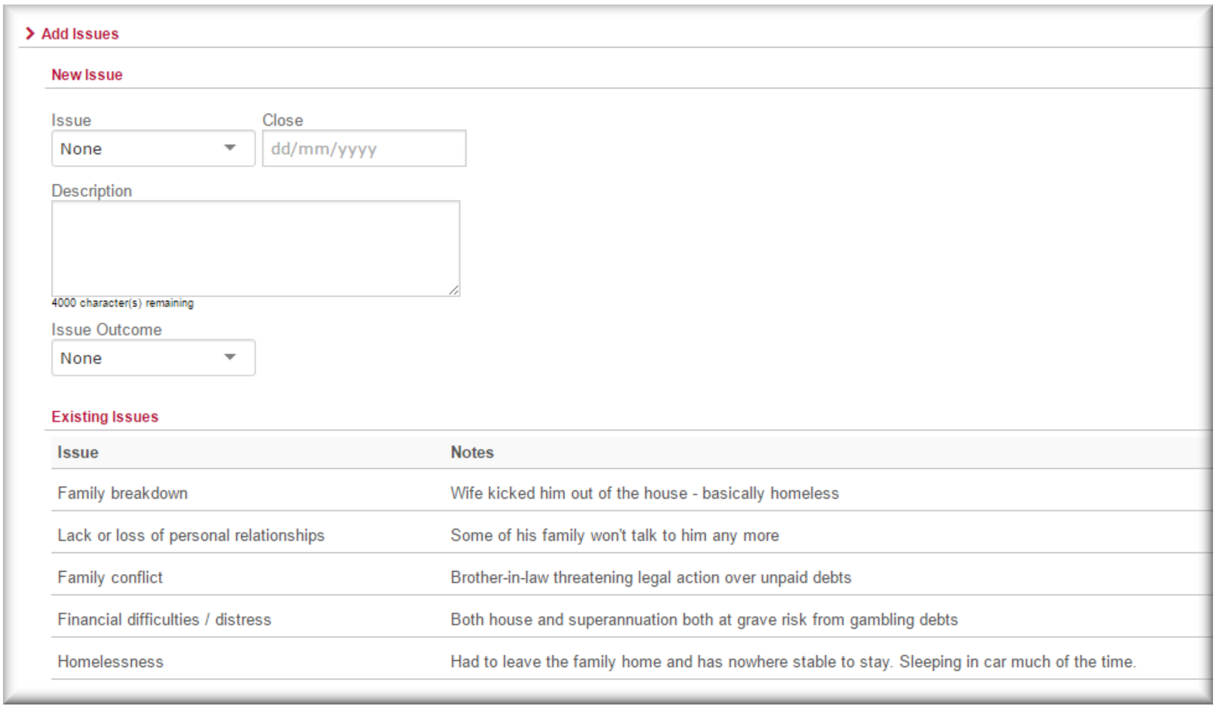
External referral

You use this section to document other services or programs that the client is connected with.

1 **IF** you have referred the person to an external service or program as part of the intake, select the service type in the **Referred To** field – otherwise leave it blank.

Issues

You use this section to record co-presenting issues you have identified in addition to the primary issue. These are recorded against the case and not the client, hence they remain confidential to *Gambler's Help Connect* users in your own agency. When you select an issue from the list you also have the option of adding some explanatory notes.



> Add Issues

New Issue

Issue: None

Close: dd/mm/yyyy

Description

4000 character(s) remaining

Issue Outcome: None

Existing Issues

Issue	Notes
Family breakdown	Wife kicked him out of the house - basically homeless
Lack or loss of personal relationships	Some of his family won't talk to him any more
Family conflict	Brother-in-law threatening legal action over unpaid debts
Financial difficulties / distress	Both house and superannuation both at grave risk from gambling debts
Homelessness	Had to leave the family home and has nowhere stable to stay. Sleeping in car much of the time.

IF you have identified co-presenting issues

1. Select the issue in the **Issues** field.
2. Optionally, add a descriptive note in the **Description** field.
3. Click Save.
   The issue displays in the ***Existing Issues*** *section.*
4. Repeat steps **1-3** as required.

You can close issues and record a resolution outcome as required.

Assignment

Telephone counsellors at the Gambler's Helpline don't need to do this step.

Exactly when, how and to whom a case is ultimately assigned as primary care provider is a matter for local process. However, it is good practice for every incoming case to have *someone* at your agency nominated as primary care provider to ensure the case doesn't get 'lost in transit'. If your agency has a staged case intake process then the intake worker might assign themself to the case until it's allocated to a practitioner.

You do this in the **Assignment** section of the page. This section is on the right hand side of the page near the top.

1 In the **Primary Care Provider** field select the assignee.

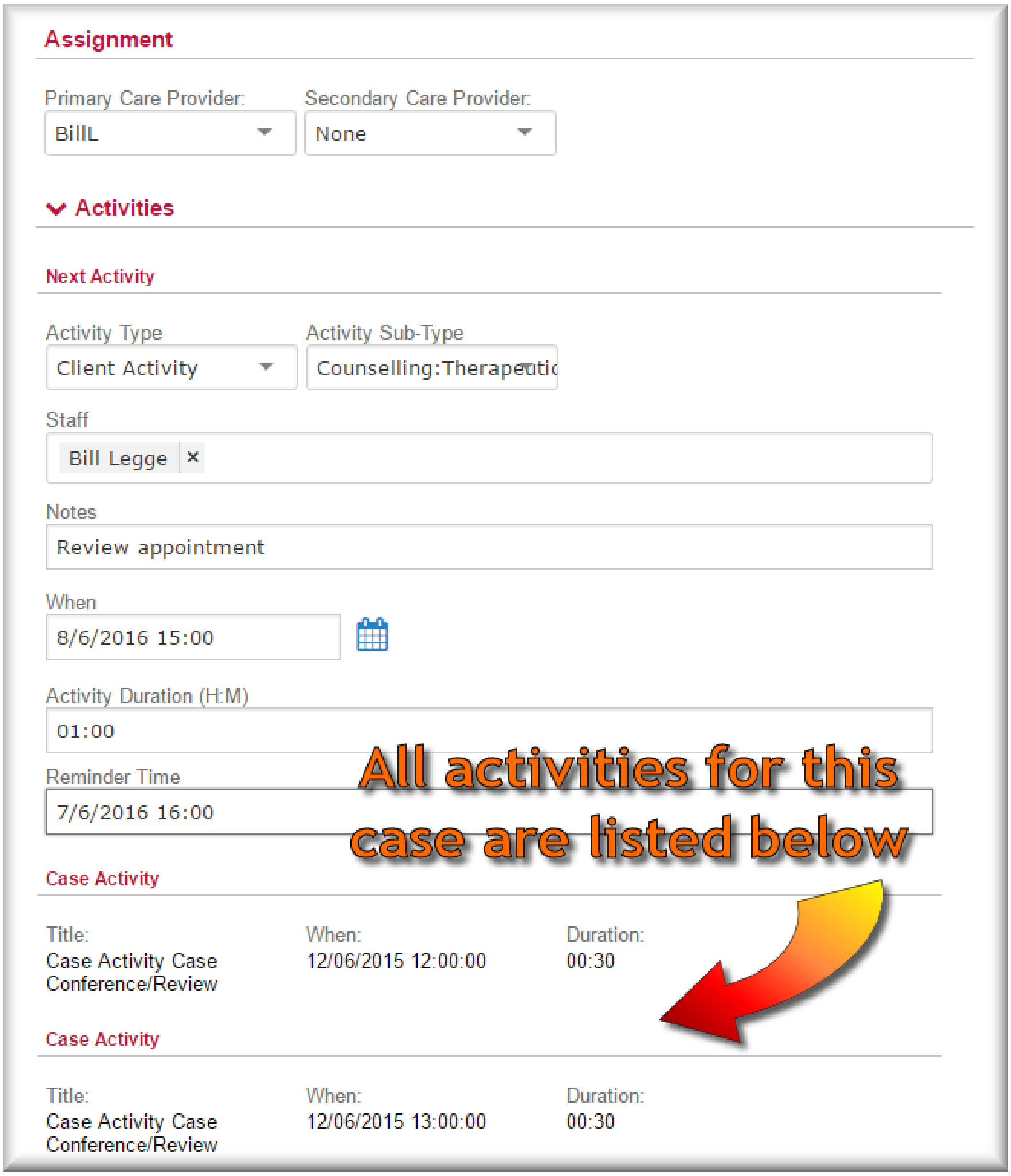
Schedule activities

You have the option of scheduling future activities for the case when you set it up. There are two benefits from doing this:

- You can set a reminder for the activity. This can be especially helpful if you want to assign the case to a colleague for follow up.
- Scheduling the activity simplifies processing later on by setting the due date and time for the activity.

See Managing activities for more information about scheduling and processing case and client activities.

You do this in the **Activities** section of the page.



1 Click **Activities** to open the **Activities** sub-menu.
The Activities section expands. If there are any other scheduled or completed activities against this case they display in summary below. Your name displays in the ***Staff*** *field.*

2 Select the **Activity Type**.

3 Select the **Activity Sub-Type**.

4 **IF** you are making the appointment for someone else, remove your name from the **Staff** field and add theirs instead.

5 In the **Note** field enter a brief note about the activity.

> *The* ***Note*** *field is mandatory – if you don't enter something in this field you can't save the case record.*

6 In the **When** field specify the required date and time for the activity.

7 In the **Activity Duration (H:M)** field specify the scheduled length of the activity.

8 In the **Reminder Time** field set the reminder for a suitable interval before the scheduled start of the activity.

Stage

All new cases default to the stage of **Incoming**. It's important that you update this status as you complete the intake to indicate the changed status of the case.

> *See* [*Case stages*]() *for more information about case statuses.*

You do this in the **Status** section of the page.

1 In the **Stage** field select:

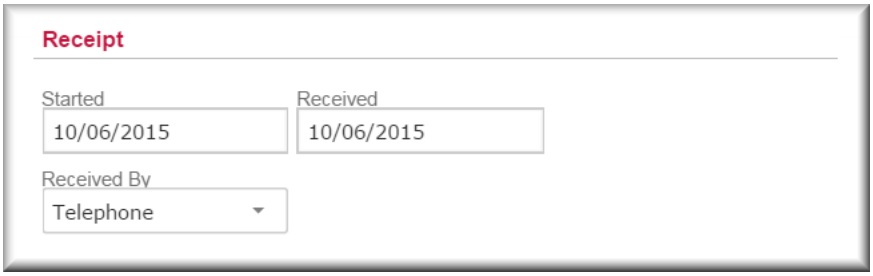
- **Acknowledged** – if you aren't ready to allocate the case
- **Assigned** – if you are handing the case off to a colleague for follow up
- **Accepted** – if you (or the nominated primary care provider) are ready to begin service with this case.

Receipt

The final step in creating a new case and client record is to specify the receipt details. The information you record here, in context with the **Referred By** and **Service Awareness** fields provides important information about the client's trajectory toward the program and their initial mode of contact.

This section of the page also records key dates in the life of the case:

- **Started** – when the case was created
- **Received** – if the case was referred from outside your local service, e.g. from the Gambler's Helpline, then this is the date the case was first viewed.



1 In the **Received By** field select the referral mode.

*If you receive a referral from the Gambler's Helpline, the **Received By** field should already show this – if this is the case don't change it.*

2 Click Save and Close.
You have completed the new case for the new client.

Creating a practitioner case for a client with a history at another agency

Gambler's Help Connect maintains a single client record. Where the client has a case history but not at your agency you can create a new case for them from the existing client record.

Conduct the client search

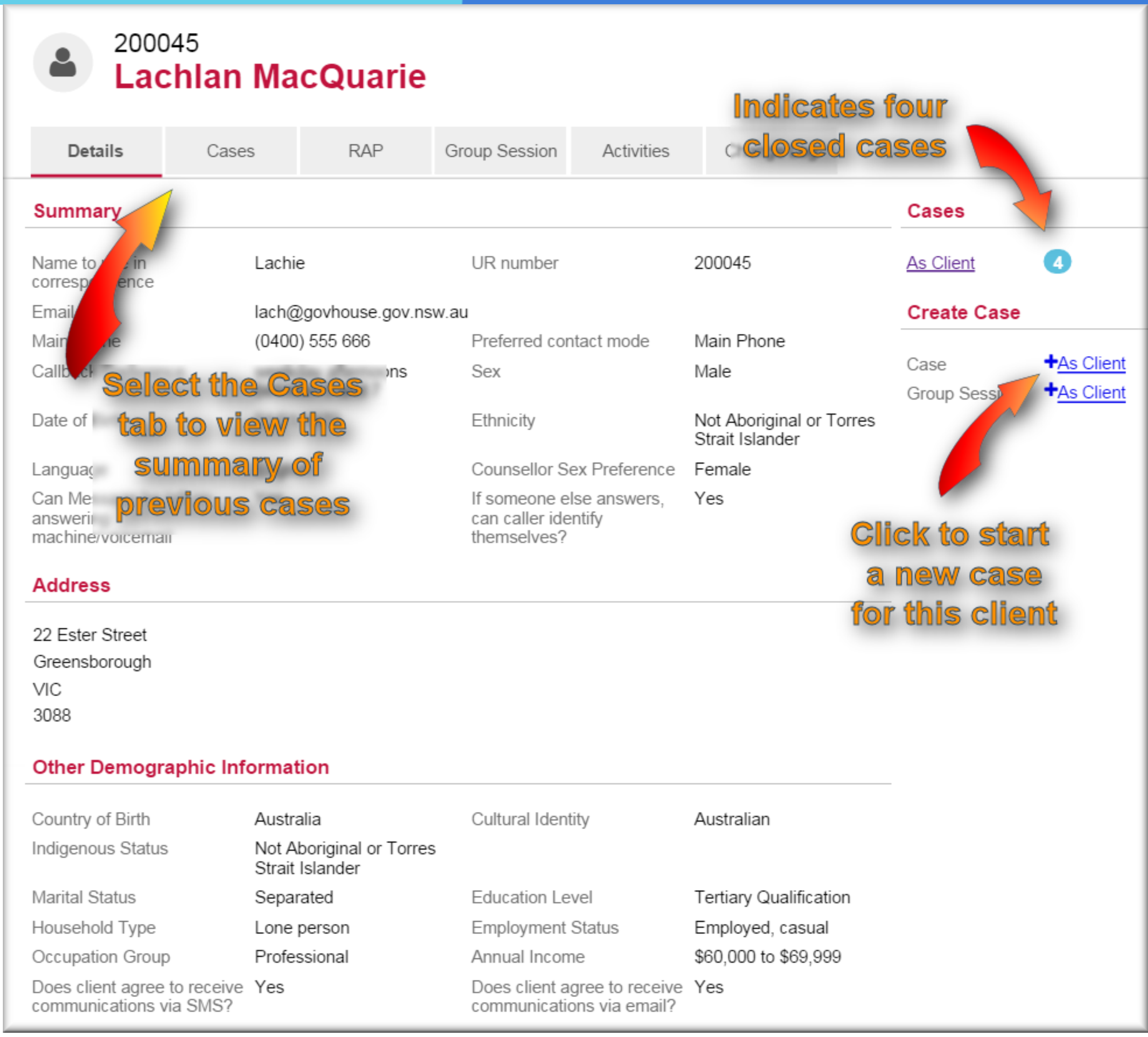
As with other new case activities you start by doing a client search to identify whether the client has a history with the program.

See Client searches if you're not sure how to do this.

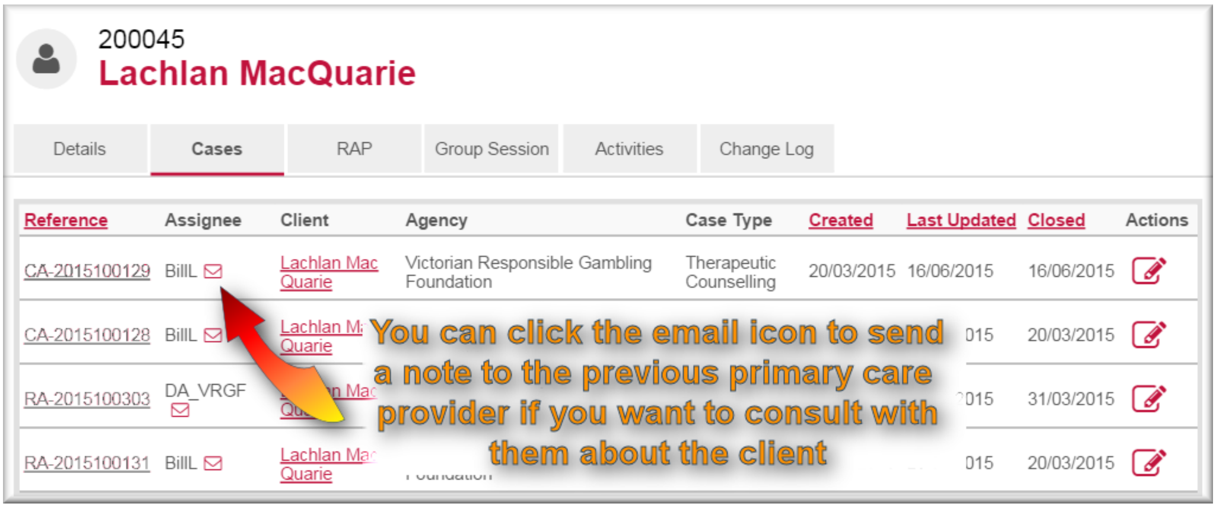
1 Open the client record in view mode.

2 **IF** there are any changes of detail:

- Click Edit to open the client record and make the relevant changes
- Click Save and Close to save the changes and return the record to view mode.



3 Select the **Cases** tab to view the summary of the client's case history.



4 Review the case history summary to ensure there are no open cases – if there are, you might want to follow up with the local service concerned.

IF *the client gives their consent, you have the option of emailing the care provider(s) for previous cases to consult with them about the client history.*

Create the case

Having identified the client record and established that it is appropriate to create a case for the client you can proceed with the new case. You do this from the **Details** page of the client record.

1. In the **Create Case** section of the client details page click **Case** +As Client.
   The ***New Case*** *page displays with the client's name in the* ***Clients*** *field.*
2. Complete the new case details as you would for a new case for a new client.

Creating a practitioner case for a client with history at your agency

Where a client has a previous case history at your agency you are able to review the previous case history to inform your approach to the new referral. The procedure for doing this is similar to that you follow when creating a case for a client with a history at another agency.

Conduct the client search

As with other new case activities you start by doing a client search to identify whether the client has a history with the program.

See Client searches if you're not sure how to do this.

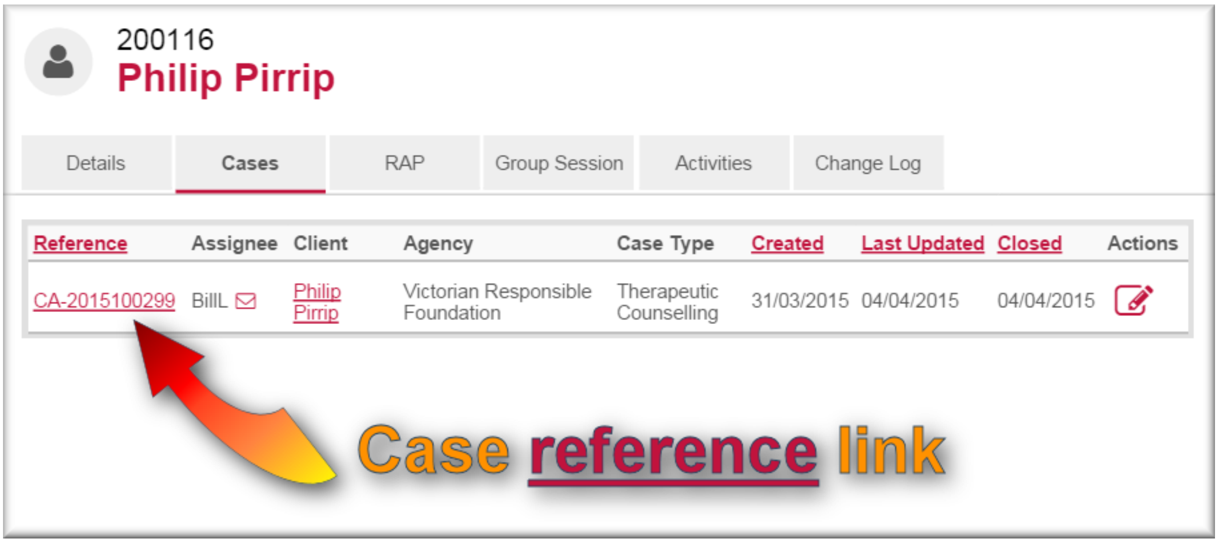
1 Open the client record in view mode.

2 **IF** there are any changes of detail:

3 Click **Edit** to open the client record and make the relevant changes

4 Click **Save and Close** to save the changes and return the record to view mode.

5 Select the **Cases** tab.
*The **Cases** tab displays a list of all previous and current cases for this client across the Gambler's Help program.*



6 Review the case history for the client.

Create the case

Having identified the client record and established that it is appropriate to create a case for the client you can proceed with the new case. You do this from the **Details** page of the client record.

1. In the **Create Case** section of the client details page click **Case** +As Client.
   The ***New Case*** *page displays with the client's name in the* ***Clients*** *field.*
2. Complete the new case details as you would for a new case for a new client.

Practitioner callback cases

In a callback case the client accepts the offer of a call from a counsellor at a local service to follow up on an initial contact. The callback case has elements in common both with a practitioner case and with an anonymous case. It is like a practitioner case because you know who the client is but it is also like an anonymous case because your contact with the client is limited.

In some of these cases the person might gain sufficient confidence in the program to have a practitioner case. Most of these cases originate with the Gambler's Helpline but some will also follow an initial contact with a local service.

Creating a practitioner callback case

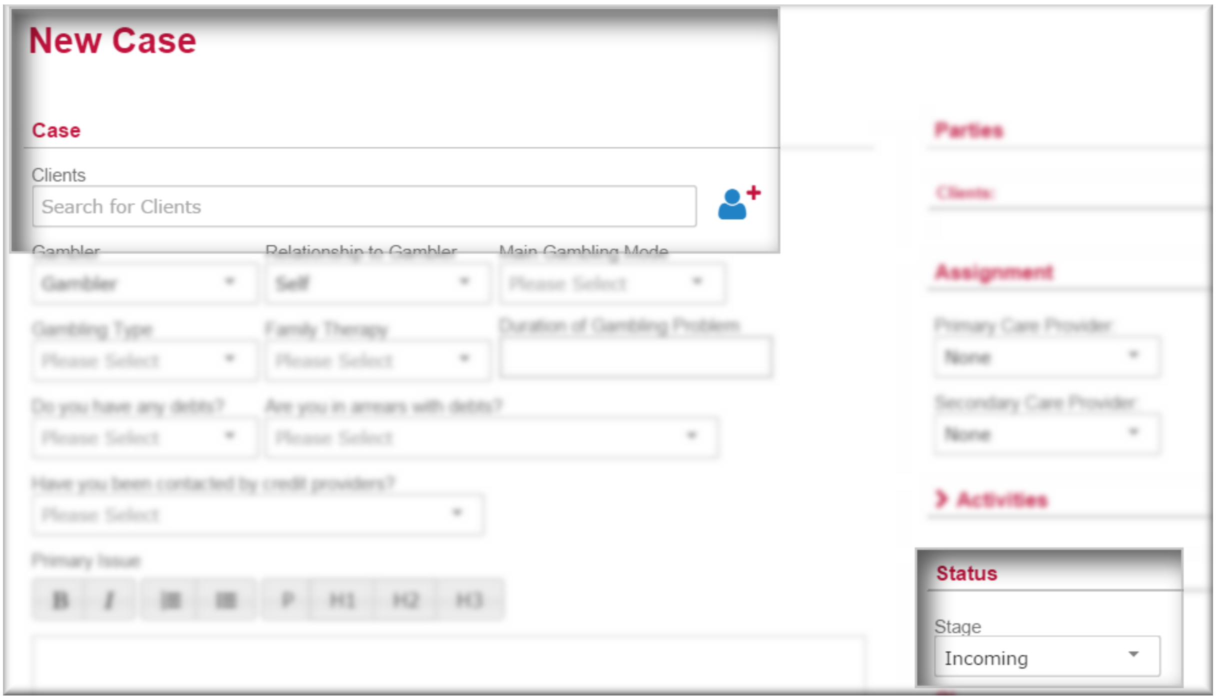
The process for creating a callback case is similar to that for creating a new case for a new client but does not require the same level of information.

While it is probable that the person has no history with the program, it is still good practice to start with a client search to eliminate the possibility they have an existing record – there is nothing to say a person with a previous history in the program can't have a callback if that is what they prefer.

See [Client searches] if you're not sure how to do this.

Having established that the client has no case history in the Gambler's Help program:

1 From the **Operations** menu select **New Case**.
*The **New Case** screen displays.*

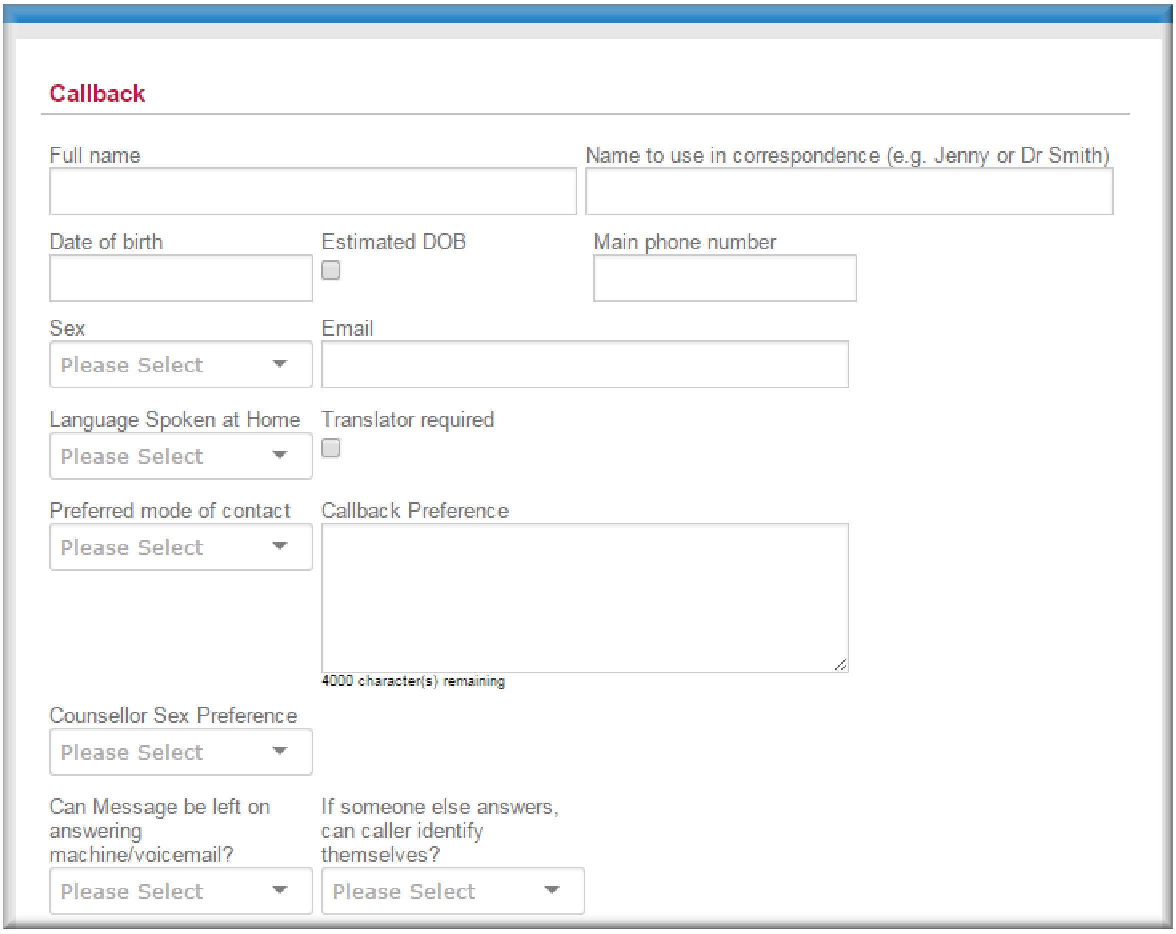


2 On the **New Case** page, in the **Clients** field, enter the client's name and then click .

The ***Case> New Individual as Client*** *page displays. This page is an overlay on the case page.*

Create the client record

At a minimum you need to complete the **Callback** section of the client record to specify the client's identity details and their contact preferences and expectations.



1 Enter the client's identity details:

- **Full Name**
  The ***Name to use in correspondence*** *defaults the given name from your entry in this field, you can change it if appropriate.*
- **Date of Birth**
  Select the ***Estimated DOB*** *checkbox where you are not able to specify the date of birth with full confidence.*
- **Main Phone Number**
- **Sex**
- **Email**
- **Language Spoken at Home**.

3 Specify the client's contact preferences. This is really important information for clients with any case type.

- **Preferred mode of contact**
- **Callback Preference** - enter the client's preferred times and mode for contact.
- **Counsellor Sex Preference** select the client's preference.
- **Can Message be left on answering machine/voicemail**
- **If someone else answers, can caller identify themselves?**

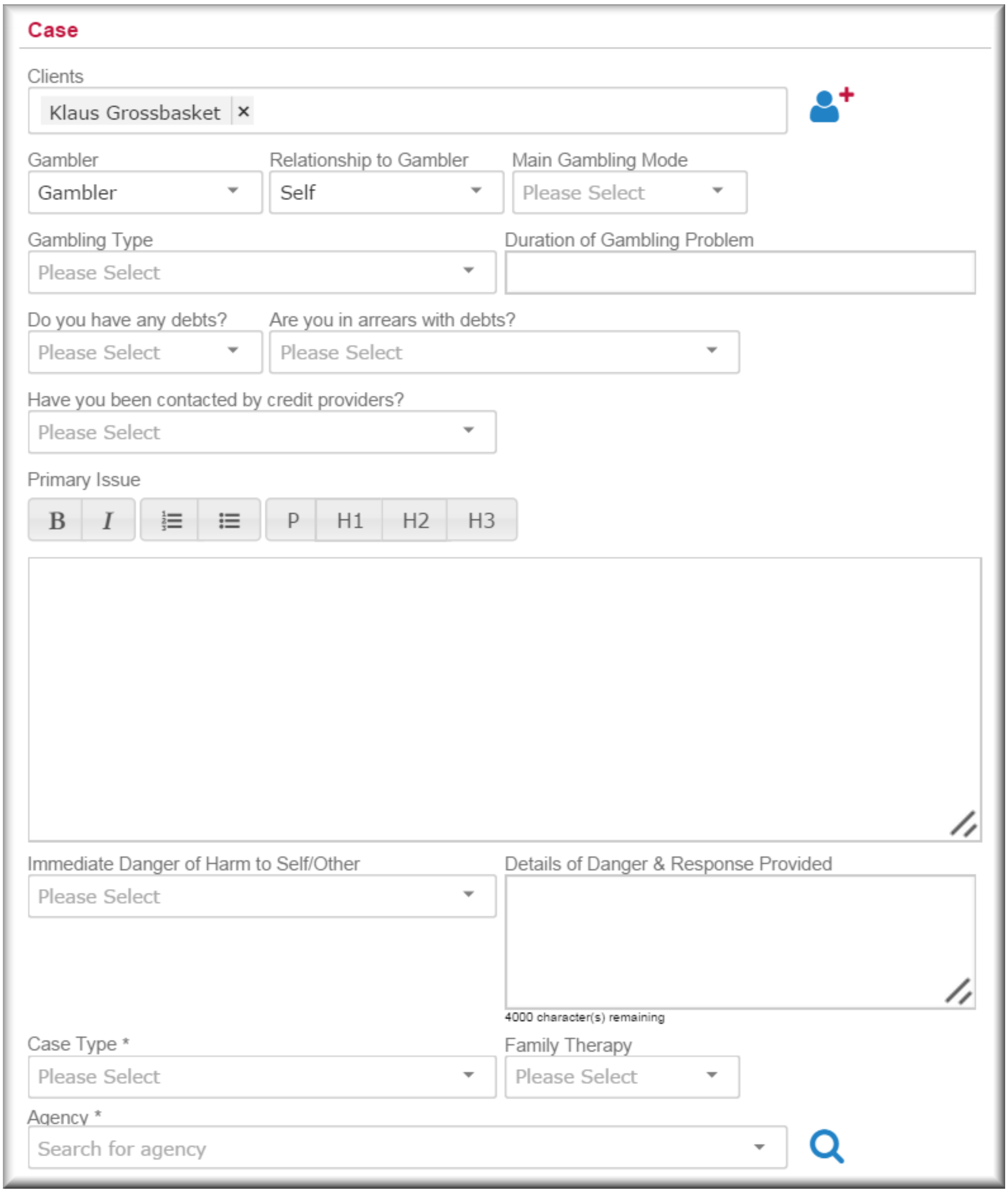
While these are the minimum needed to set up the client record for a callback case, you can also add information in other sections of the client record if the client provides it.

3 When you have completed all the relevant sections of the page, click **Save**.
The client page closes and the case page re-displays populated with the client details you recorded.

Complete the case

In the **Case** section of the page you complete the key details defining the case.

For a callback case, at a minimum you must specify the case type and agency, however, the more information you can elicit about the case, the better the person providing the callback will be able to respond to the client.



1 Where the information is available, specify the gambling attributes of the case:

- **Gambler**
- **Relationship to Gambler**
- **Main Gambling Mode**
- **Gambling Type**
- **Duration of Gambling Problem**.

2 Where the information is available, specify debt details:

- **Do you have any debts?**
- **Are you in arrears with debts?**
- **Have you been contacted by credit providers?**

3 In the **Primary Issue** field, summarise the presentation.

4 **IF** you have identified risk issues, specify these in the **Immediate danger of harm**… and **Details of danger**… fields.

5 In the **Case Type** field select the **Callback**.

6 In the **Agency** field, select your agency.

7 In the **Assignment** section, in the **Primary Care Provider** field, select the practitioner to whom you want to assign the callback.

8 Click **> Activities** to open the **Activities** sub-menu.
*The Activities section expands. If there are any other scheduled or completed activities against this case they display in summary below. Your name displays in the **Staff** field.*

It is very important that you schedule the callback activity at the time the client requested it.

9 In the **Activity Type field,** select **Client Activity** and in the **Activity Sub-Type** field select **Callback**.

10 In the **Staff** field select the person who will be making the callback (typically the primary care provider).

11 In the **Note** field enter a brief note about the activity.

*The **Note** field is mandatory – if you don't enter something in this field you can't save the case record.*

12 In the **When** field specify the required date and time for the client to receive the callback.

13 In the **Activity Duration (H:M)** field specify the scheduled length of the activity.

14 In the **Reminder Time** field set a reminder for the counsellor taking the callback.

15 In the **Stage** field select:

- **Incoming** – if you are a telephone counsellor referring the callback to a local service
- **Acknowledged** – if you aren't ready to allocate the case
- **Assigned** – if you are handing the case off to a colleague for follow up
- **Accepted** – if you (or the nominated primary care provider) are ready to begin service with this case.

See Case stages for more information about case statuses.

16 In the **Receipt** section, in the **Received By** field, select the mode.

17 Click **Save and Close**.

Anonymous cases for practitioners

From time to time you will provide help, advice and information to people who are not registered clients of the Gambler's Help program and who, at the time of their contact with the program, don't want to become registered (names) clients. Some of these people might choose to become clients later, for others, the advice, support or information they receive in the anonymous case is all they want.

Click to view a video demonstration of how to create an anonymous case.

Three key features of the anonymous cases are:

- There is no associated client record
- It should never be left open, i.e., you mark it as **Completed** before you save and close
- An anonymous case will only ever have one associated activity.

In the edit case page, when you process an anonymous case, at a minimum you specify:

- **Case type**
- **Agency**
- The fields in the **Anonymous** section
- **Primary Care Provider**
- **Stage**
- The fields in the **Closure** section
- The fields in the **Receipt** section.

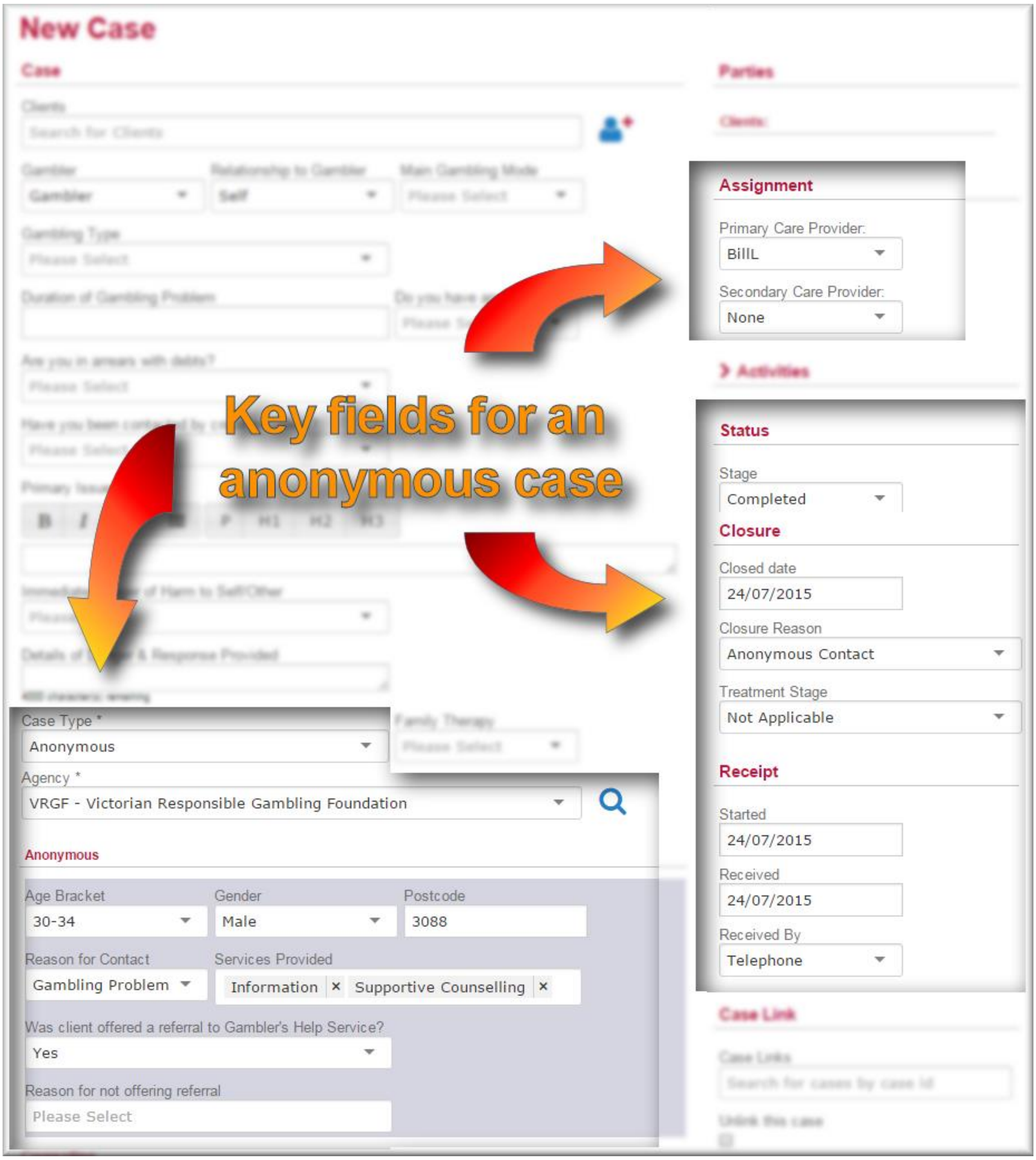
If the client volunteers more information, for example about their gambling situation or debt position, or if you also facilitate a referral for them to another service, you should also record this as well.

The more data we can record about anonymous clients, the better we can understand the help seeking population and how they come to Gambler's Help .

Creating an anonymous practitioner case

To create an anonymous case:

1 From the **Operations** menu select **New Case**.
*The **New Case** screen displays.*



2 In the **Case Type** field, select **Anonymous**.
*The **Anonymous** section of the page is highlighted.*

3 In the **Agency** field, select your agency/team.

4 In the **Anonymous** section specify the details of the anonymous case:

- **Age Bracket** of the anonymous client
- **Gender**
- **Postcode**
- **Reason for contact**
- **Services Provided** – this is a multi-select field so you can add more than one service
- **IF**:
  - You offered the client a referral to the Gambler's Help service select **Yes** in that field.
  - You didn't offer a referral, select **No** and then select the reason why in the **Reason for not offering referral** field.

5 In the **Assignment** section, in the **Primary Care Provider** field, select your name.

6 In the **Status** section, on the **Stage** field, select **Completed**.

7 In the **Closure** section:

- In the **Closure Reason** field, select **Anonymous Contact**
- In the **Treatment Stage** field, select **Not Applicable**.

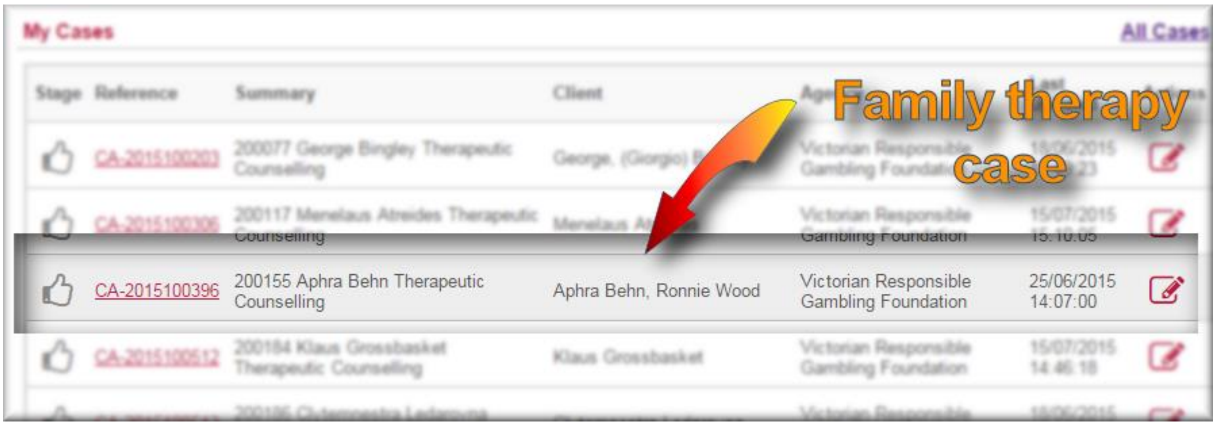
8 In the **Receipt** section, in the **Received By** field, select the contact mode.

9 Click Save and Close.
The Anonymous case displays in view mode.

Working with families in practitioner cases

You can associate more than one *registered* client with a case. Typically, this will be where a gambler and their partner, or other familiy members, participate in a common case.

In the **Cases** list a family case shows more than one client in the **Client** column.



Family cases for practitioners – points to consider

When deciding to set up a family case you should consider the following:

- Sometimes, the gambler in this scenario has an individual case as well as the family case, while the partner is only associated with the family case. However, there is nothing to prevent the partner having an individual case as well if the circumstances indicate.
- Are you working with *both* partners? Or is one person coming along just to support their partner? In this situation, you don't record it as a family therapy case – although there is nothing stopping you noting the fact of the attendance of that family member in the activity notes.
- It might be you set up a family case where *neither* partner has a current practitioner case. Should you do this, *both* partners should come to the majority of sessions and you work with both of them together.

Creating a practitioner family case

To create a family case:

1 From the **Operations** menu select **New Case**.
The ***New Case*** *screen displays.*

2 In the **Clients** field, use the field search to locate and select the name of the first client. If the client is not registered, create the new client record as for any other new case.

3 Choose an option:

If…	Then
…the second client is already registered…	Select the client
…the second client is NOT registered…	Click and then create a client record for the new client.

4 Complete the gambling, debt, primary issue and risk fields of the case as for the gambler (not the affected other).

5 In the **Case Type** field select **Practitioner**.

6 In the **Family Therapy** field select **Yes**.

7 Select the agency.

8 Complete the **Counselling** fields as for the gambler.

9 Assign status, care provider and received by values.

10 Optionally, schedule an appointment in the **Activities** section.

11 Click **Save and Close**.

When recording activities against family therapy cases you need to make sure that all the clients are included in the activities. See *Processing activities for a family therapy case* *if you're not sure how to do this.*

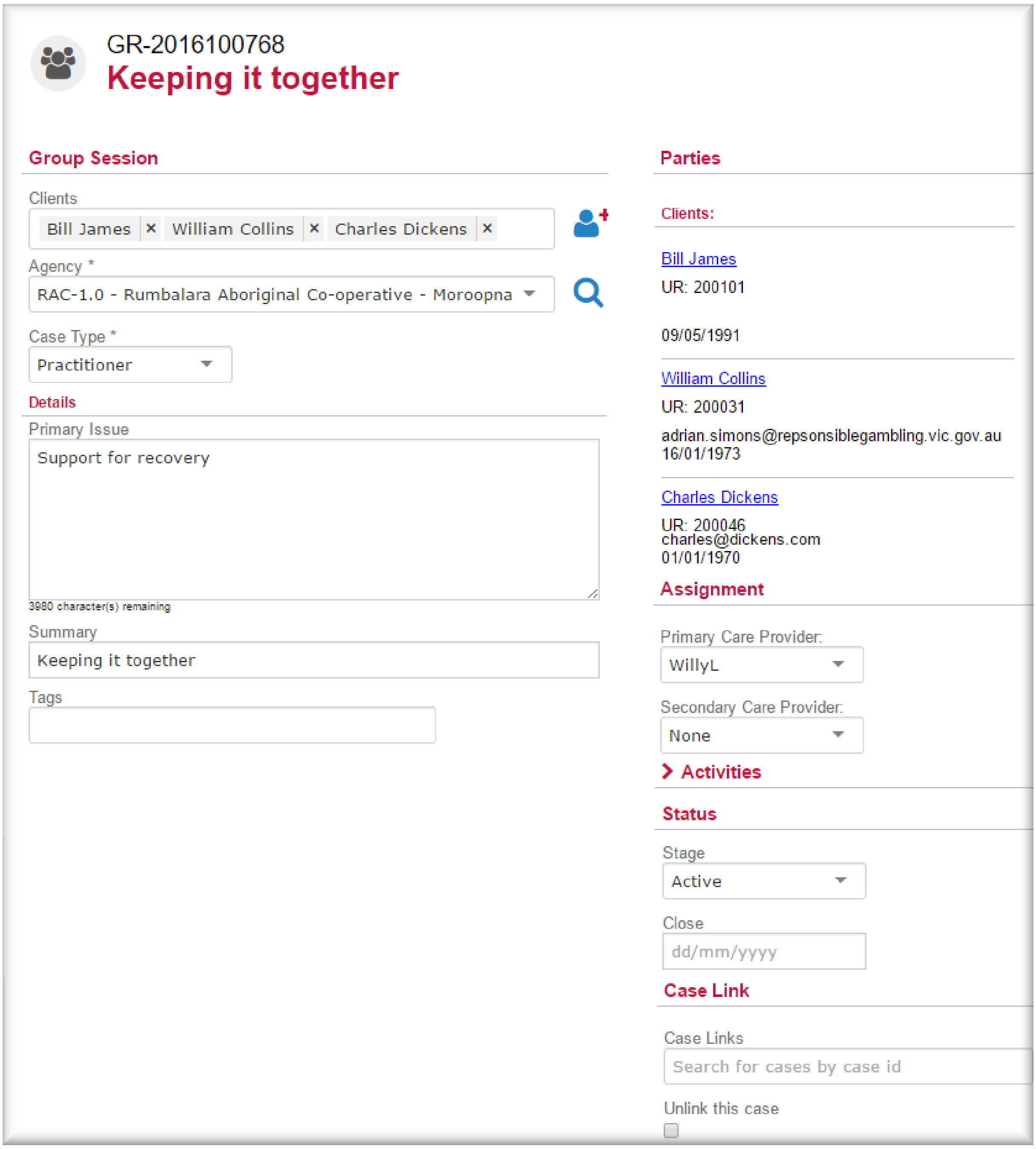
Practitioner group cases

Group cases have one or more counsellors and more than one client. They can be one-off or a scheduled group therapy program. Typically, clients in group cases will have previous history in the program and often might have an active practitioner case at the time they join a group case.

You can also set up an anonymous practitioner group case, for example, to record a regular drop-in session you run.

Creating a practitioner group case

1 In the **Operations** menu select **New Group Session**.
The ***New Case*** *for group sessions screen displays.*



2 In the **Clients** enter and select the names of the clients you want to participate in this group.

3 In the **Agency** field select the agency where the group will run.

4 In the **Case Type** field select **Practitioner**.

5 In the **Narrative** field enter a description of the group session or program.

6 In the **Summary** field enter the name of the group.
This will be the name of the group that displays in your case list.

7 In the **Assignment** section, select the **Primary Care Provider**.

8 **IF** another practitioner is going to share management of the case with you, select them on the **Secondary Care Provider** field.

9 In the **Status** section, in the **Stage** field select **Active**.

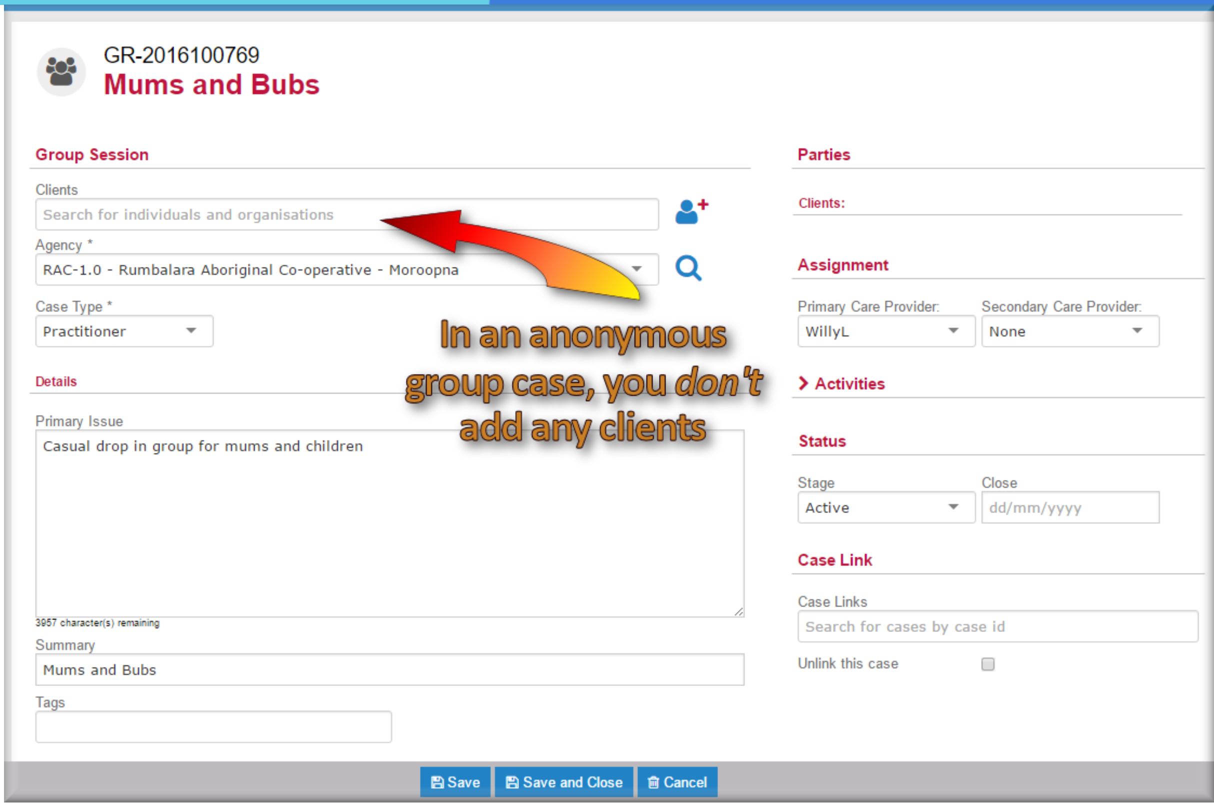
10 Click **Save and Close**.

After setting up the group case you should add a preparation activity to the group case account for your time. See *Processing activities for group case sessions* *if you're not sure how to do this.*

Creating an anonymous practitioner group case

You can use this type of case when attending a group session for people who aren't registered with your service. The difference between this and a regular group case is that you don't add any clients to the record. An anonymous group case can happen just once, or it can be a regular part of your program, for example, when you run a regular drop in session. Unlike an anonymous case for a single person, you can keep this type of case open and record more than one activity for it.

1 In the **Operations** menu select **New Group Session**.
The **New Case** *for group sessions screen displays.*



2 In the **Agency** field select the agency where the group will run.

3 In the **Case Type** field select **Practitioner**.

4 In the **Narrative** field enter a description of the group session or program.

5 In the **Summary** field enter the name of the group.
This will be the name of the group that displays in your case list.

6 In the **Assignment** section, select the **Primary Care Provider**.

7 **IF** another practitioner is going to share management of the case with you, select them on the **Secondary Care Provider** field.

8 In the **Status** section, in the **Stage** field select **Active**.

9 Click **Save and Close**.

Recovery Assistance Program (RAP) cases for practitioners

The Recovery Assistance Program (RAP) provides material aid to people recovering from gambling addiction or to people affected by the gambling addiction of another.

Refer to the Gambler's Help Program Guidelines for full details on RAP rules on eligibility and payment categories.

If you want a client of your service to receive RAP assistance, and your service *does not* have RAP funding, then you will need to refer your client to a Gambler's Help local service. A financial counsellor there will review the case and provide funding if the client is eligible. The client must have their details recorded in *Gambler's Help Connect* for you to do this.

If your In-language or Aboriginal service can offer RAP assistance to your clients directly, the procedure for doing this is the same for Gambler's Help local services.

See Recovery Assistance Program cases for the details of how you do this.

Referring a practitioner client for RAP

You can use this procedure if you want to refer a client to a Gambler's Help local service for any of the programs defined by ***case type****. You might make arrangements with the local service to make sure your client gets seen promptly but here is the procedure you follow in Gambler's Help Connect.*

For this procedure your client should already be registered in *Gambler's Help Connect*:

1. Start a new case for the client.
2. Complete the case details as you would for a new client.
3. In the **Primary Issue** field, enter the details of why the client needs RAP funding.
4. In the **Case Type** field, select **Financial Counselling**.
5. In the **Agency** field select the Gambler's Help local service you want to send your client to.

   Click the icon next to the ***Agency*** *field to search for an agency.*

6. In the **Counselling** section:
   - In the **Referred By** field, select **Other GH Agency**.
   - In the **Service Awareness** field, select **Client is Re-presenting**.
7. In the **Add Issues** section, add any issues if needed.
8. In the **Assignment** section make sure both the **Primary Care Provider** and **Secondary Care Provider** fields are blank.

9 In the **Status** section in the **Stage** field, select **Incoming**.
Doing this flags the incoming case for the intake worker at the local service where you are sending your client.

10 Click Save and Close.
The case is sent to the agency you selected. Once you leave the case page, you won't be able to access it again since you referred it on.

11 Add an activity against your practitioner case for the client to account for the referral.

4 Recording activities for practitioner cases

You record *activities* in *Gambler's Help Connect* to document the work you have done for your clients and the time it took you to do it. Activities can range from simple to complex and can involve multiple clients or counsellors.

Your activity records your notes, while the time you record against activities adds to your agency hours of service reporting.

This section describes how you record and maintain activities:

- Types of activities
- Recording activities
- Scheduled activities
- Activity reminders
- Anonymous activities
- Family therapy activities
- Group session activities
- Cancelling activities
- No shows
- Attaching documents to activities.

Practitioner activity types and subtypes

Activities are always associated with a case record. Activities distinguish between:

- **Direct** time covering work done *with* a client in person or over the phone
- **Indirect** time covering work done *on behalf* of a client (including travel).

The foundation does not value direct time more than indirect time – they're both valuable. The reason for the distinction is to help us to understand the client experience *of the Gambler's Help service and appreciate the work done behind the scenes to provide that service.*

When you record an activity you specify an activity type and sub-type. The table below lists the activity types and sub-types you can use.

Activity type	Activity sub-type
Client activities record work done with the client in person or on the phone. These activities *will always* include a component of direct and indirect time.	○ Practitioner Client Services
Case activities record work done without the client present. These activities should *only record indirect time*.	○ Practitioner Case Work
Anonymous activities record work done on anonymous cases. These activities should *never* include direct time.	○ Practitioner Anonymous Intervention
Group session activities: ○ Session ○ Preparation ○ Administrative	*Note: Group session activity types don't have sub-types. Preparation is used to account for time setting up a group program. Administration is used to account for time managing a program, for example, sending invitations.*

Where you have to travel in the course of any of these activity types you enter your travel time as a separate item.

All activities include a timesheet where you record your direct, indirect and travel time. This displays when you mark an activity as completed.

Activity notes

In your activity notes be aware of the following STRICT rules:

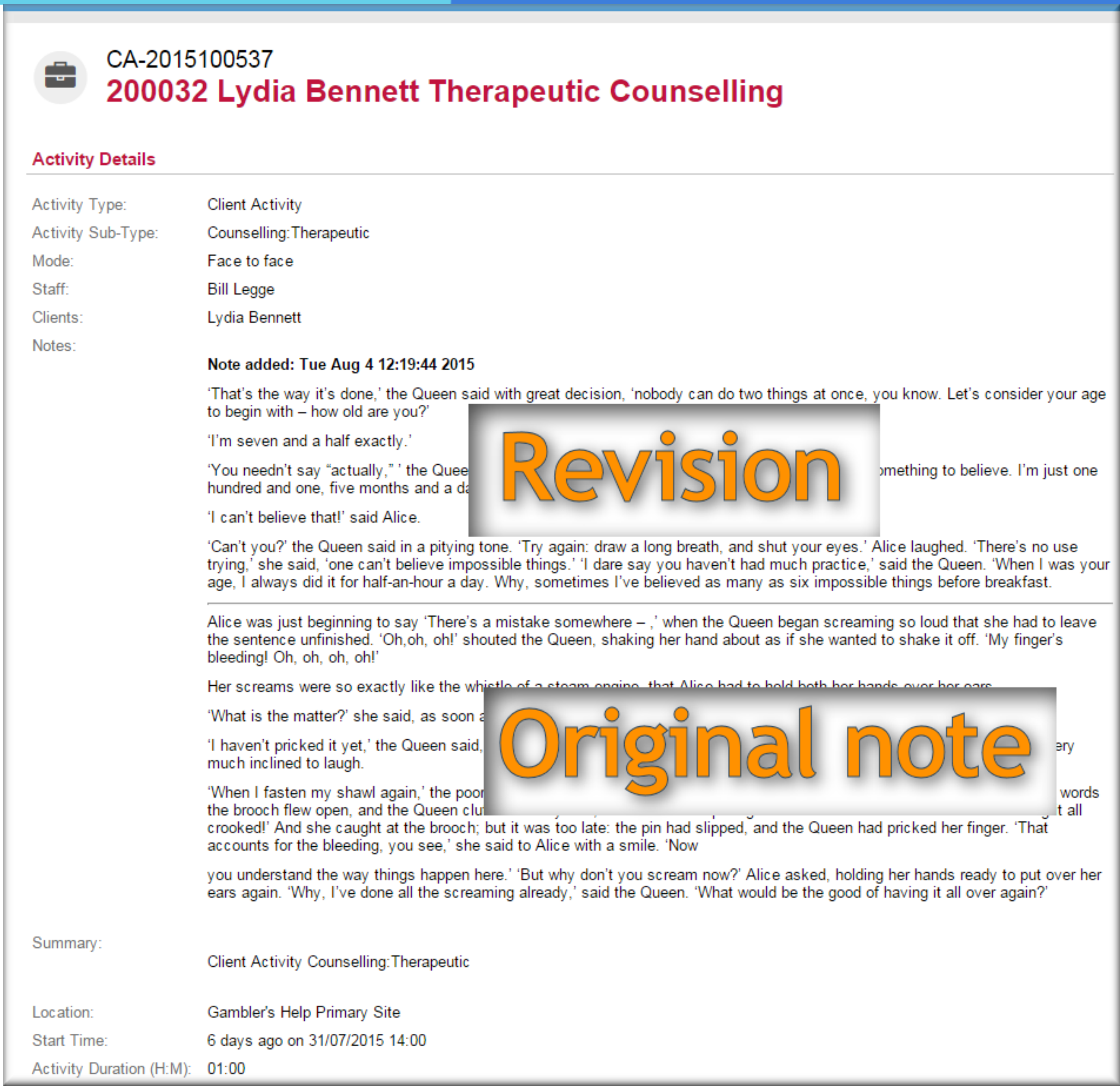
Anonymous case notes *– NEVER enter any information that identifies the client.*

Justice clients *– if you are working with clients in prison, NEVER enter any information that can identify the prison.*

Gambler's Help Connect protects the integrity of the notes you write for activities. When you save an activity after entering notes, these become part of the client's case record. You cannot edit or delete notes after you enter them. You can make additions or corrections to the original note. These then display above the original entry.

View an interactive illustration of how to edit activity notes.

The illustration below shows a revised activity note in view mode.



CA-2015100537
200032 Lydia Bennett Therapeutic Counselling

Activity Details

Activity Type:	Client Activity
Activity Sub-Type:	Counselling:Therapeutic
Mode:	Face to face
Staff:	Bill Legge
Clients:	Lydia Bennett
Notes:	

Note added: Tue Aug 4 12:19:44 2015

'That's the way it's done,' the Queen said with great decision, 'nobody can do two things at once, you know. Let's consider your age to begin with – how old are you?'

'I'm seven and a half exactly.'

'You needn't say "actually," ' the Quee ... omething to believe. I'm just one hundred and one, five months and a da ...

'I can't believe that!' said Alice.

'Can't you?' the Queen said in a pitying tone. 'Try again: draw a long breath, and shut your eyes.' Alice laughed. 'There's no use trying,' she said, 'one can't believe impossible things.' 'I dare say you haven't had much practice,' said the Queen. 'When I was your age, I always did it for half-an-hour a day. Why, sometimes I've believed as many as six impossible things before breakfast.

Alice was just beginning to say 'There's a mistake somewhere – ,' when the Queen began screaming so loud that she had to leave the sentence unfinished. 'Oh,oh, oh!' shouted the Queen, shaking her hand about as if she wanted to shake it off. 'My finger's bleeding! Oh, oh, oh, oh!'

Her screams were so exactly like the wh...

'What is the matter?' she said, as soon a...

'I haven't pricked it yet,' the Queen said, ... ery much inclined to laugh.

'When I fasten my shawl again,' the poor ... words the brooch flew open, and the Queen clu... t all crooked!' And she caught at the brooch; but it was too late: the pin had slipped, and the Queen had pricked her finger. 'That accounts for the bleeding, you see,' she said to Alice with a smile. 'Now

you understand the way things happen here.' 'But why don't you scream now?' Alice asked, holding her hands ready to put over her ears again. 'Why, I've done all the screaming already,' said the Queen. 'What would be the good of having it all over again?'

Summary:	Client Activity Counselling:Therapeutic
Location:	Gambler's Help Primary Site
Start Time:	6 days ago on 31/07/2015 14:00
Activity Duration (H:M):	01:00

Scheduled activities and SMS reminders

In *Gambler's Help Connect* you can *schedule* future activities such as appointments and then complete them after the event. Scheduling an activity for a practitioner case enables *Gambler's Help Connect* to:

- Send an SMS reminder to the client (subject to their consent and an available mobile number)
- Flag your unavailability for the scheduled date and time to other *Gambler's Help Connect* users at your local service
- Display the scheduled activity in your **My Activities** page (until you complete it)
- Display a reminder of the upcoming activity for you.

To receive SMS reminders of appointments, client must have a mobile number registered as their main phone and have consented to receive SMS messages from the Gambler's Help service.

You record phone numbers and SMS consent in the client record. See [Identity and contact preferences] for phone numbers and [Other demographic information] for SMS consent.

You can view scheduled activities in the case record and the activities calendar.

Alternatively you can process all your client activities after the event – if an SMS reminder is not required.

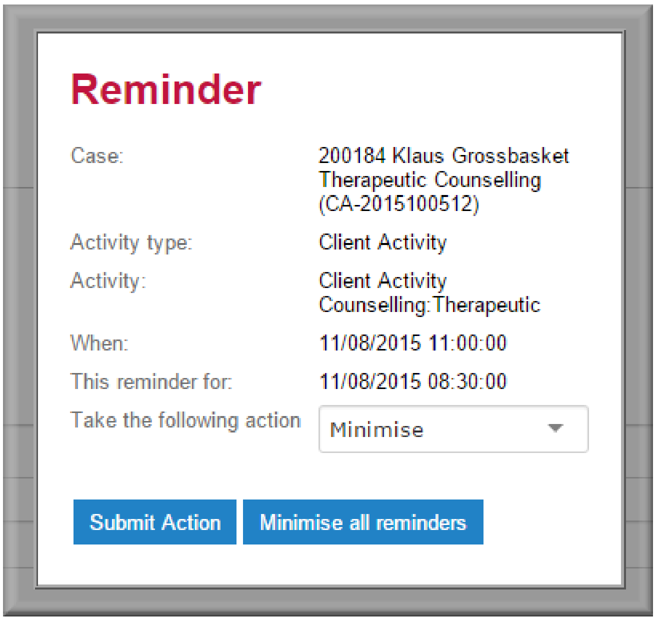
Some activities don't require scheduling in *Gambler's Help Connect*. For example, case type activities where the client is not present don't need to be booked in *Gambler's Help Connect* – unless you want to block out the time. Obviously, you can't schedule unplanned activities such as an unexpected call from a client.

For anonymous cases you **always** record and complete an activity as the last step in processing the case.

Activity reminders

You can set reminders for your activities to prompt you of upcoming appointments. These display on the notifications pane under the reminder notification icon approximately 24 hours before the scheduled activity and remain until you process the activity. Overdue activities display a pop-up reminder when you log on to *Gambler's Help Connect*.

When a scheduled activity for which you have set a reminder becomes due – or overdue – a reminder pop-up displays when you log on to *Gambler's Help Connect*.



Reminders will display when they are due, without reference to whatever you might be doing in Gambler's Help Connect *at the time. For example, you might be editing a case for Lydia, when a reminder about an activity for John displays.*

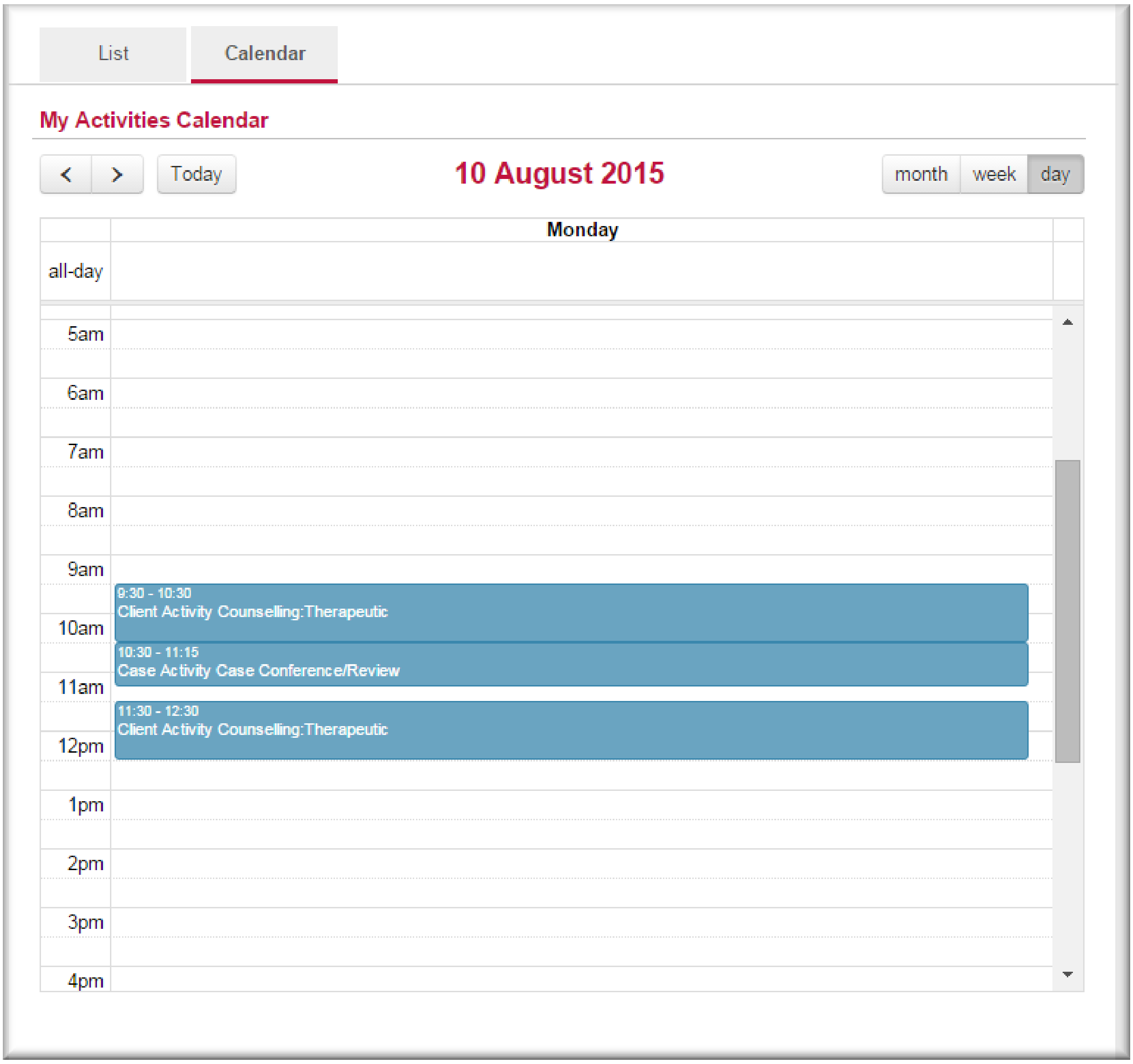
Activity documents

You can attach *a single* document to an activity. When you do this you can view the document from the activity record or from the documents tab in the case record. If you have multiple documents you want to attach, you can either attach them to the case file or combine them into a single document to attach to the activity.

When you attach a document directly to an activity record you ***can't*** *edit the metadata, that is, edit the title or description text. You* ***can*** *do these things to documents attached to the case record.*

Activity calendar

The calendar view in your **My Activities** list provides a month, week or day view of your scheduled activities. You can click an activity entry in the calendar to open the activity record in view mode. When you complete an activity it no longer displays in the calendar.



Activity duration

When you schedule an activity you also set its length. This is the time that is blocked out in your calendar. When you process the activity, the planned time of the activity automatically transfers to the direct time field in the timesheet. You can change this value if need be.

For example, you scheduled an hour for a session with a client, but the session ran over by another thirty minutes. While the scheduled duration of the activity was an hour, the actual direct time was an hour and a half. When you process the activity, the direct time field in the timesheet will default to an hour which you then change to ninety minutes – reflecting the actual direct time.

Processing activities

Depending on the context you might either schedule an activity and then complete it after the event, or complete the activity in one go.

If you want a client to receive an SMS reminder, or you want to block out time in your *Gambler's Help Connect* schedule (or that of a colleague), then you schedule first and process later. For administrative activities, unscheduled contacts with clients or case type activities where the client wasn't present, there's no need to schedule – you can complete the activity in a single procedure.

There are also slight differences in how you process activities for practitioner cases, anonymous cases and group cases. The procedures for each are described below.

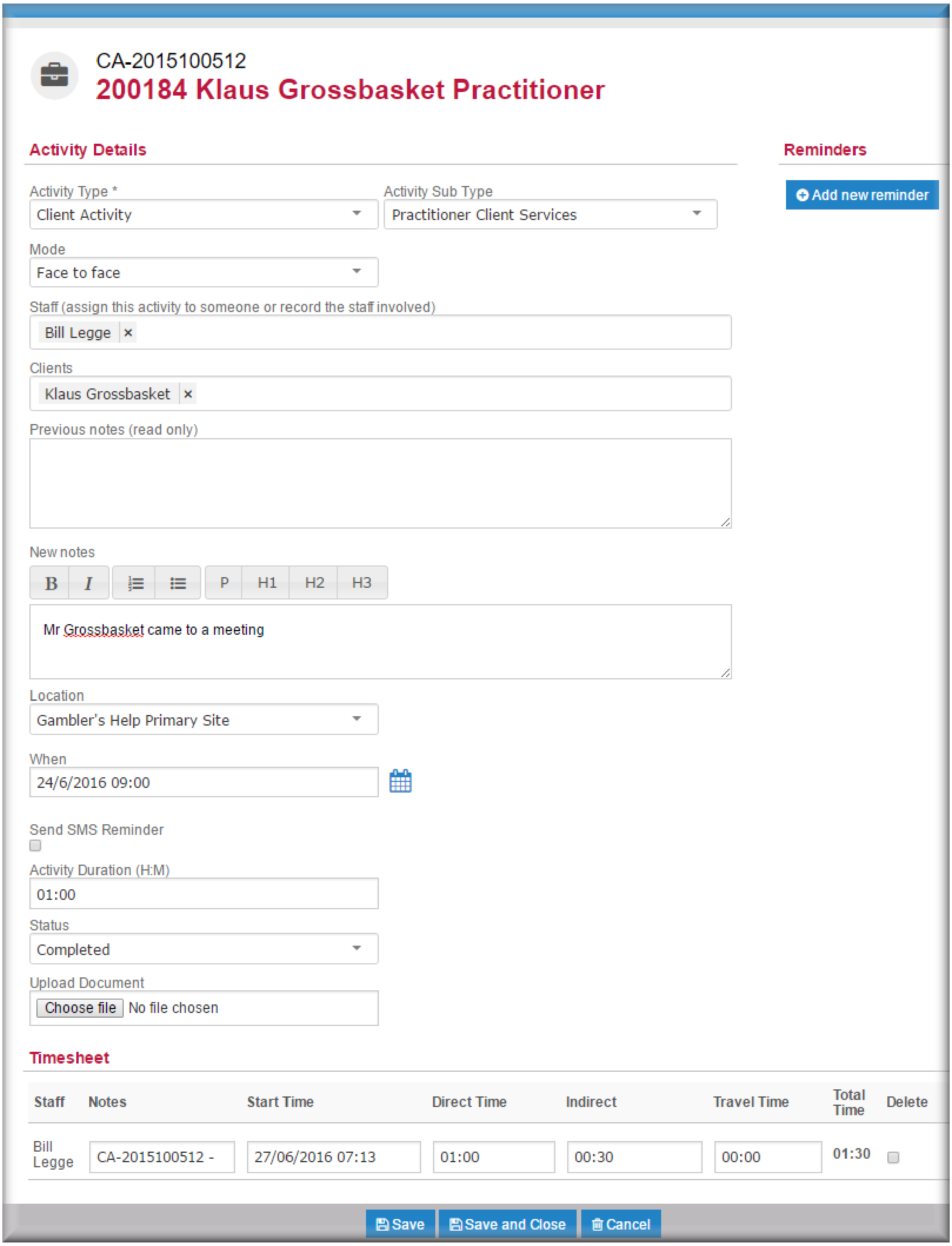
Click to view a video demonstration of the end-to-end procedure for processing an unscheduled activity.

Processing an unscheduled activity for a practitioner case

To create a new activity record:

1 Locate and open the case for which you want to record an activity.

2 Click to open a new activity record for the case.



3 In the **Activity Type** field, select the activity type:

- **Client** activities where the client will be physically present or participating by phone

- **Case** activities where the client will not participate in the activity.

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

See the practitioner activity types and sub types table for a list of the activity sub types.

5 In the **Mode** field, select the contact mode:

- **Face to face**
- **Telephone**
- **Online**
- **Written**
- **Email**
- **Other**.

6 In the **Staff** field the name of the primary care provider for the case defaults. You can change this if required.

7 In the **Clients** field, the name of the client for this case defaults.

8 In the **New notes** field enter a note about activity.

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

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

11 **IF** this was a client type activity, select the duration of the activity in the **Activity Duration (H:M)** field.

12 In the **Status** field, select **Completed**.
*The **Timesheet** displays at the bottom of the page. If you specified a duration for the activity this value now displays in the **Direct time** field.*

13 In the **Timesheet** specify direct, indirect and travel time as applicable.

14 Click Save and Close.
The activity is completed. The notes you wrote for the activity display in the **Previous notes (read only)** field.

Scheduling an activity for a practitioner case

If you want a client to receive an SMS reminder for an upcoming activity you must schedule the activity.

Click to view a video demonstation of how to schedule an activity.

To schedule an activity:

1 Locate and open the case for which you want to schedule an activity.

2 Click to open a new activity record for the case.

3 In the **Activity Type** field, select the activity type.

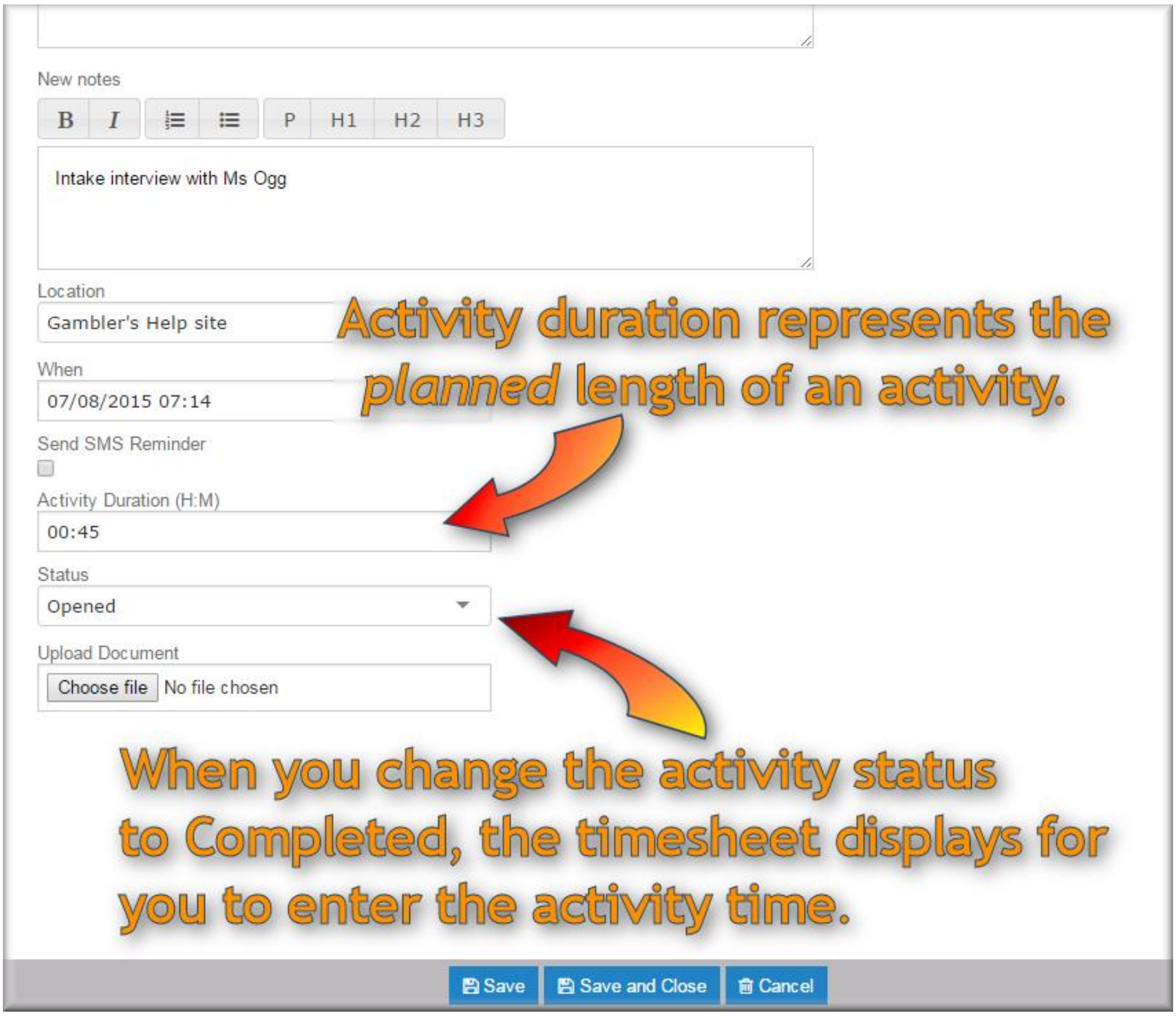
4 In the **Activity Sub Type** field, select the sub type.

5 In the **Mode** field, select the contact mode.

6 In the **Staff** field the name of the primary care provider for the case defaults. You can change this if required.

7 In the **Clients** field, the name of the client for this case defaults.

8 In the **New notes** field enter a description of the planned activity if required.



9 In the **Location** field, select the location for the planned activity.

10 In the **When** field, select the date and time for the planned activity.

11 **IF** this is a client activity and the client wants to receive an SMS reminder, select **Send SMS Reminder**.

The client must have a mobile number recorded as their main phone in the client record AND they must have given consent for them to receive SMS reminders for activities. See Identity and contact preferences and Other demographic information if you're not sure how to do this.

12 In the **Activity Duration (H:M)** field, select the planned duration of the activity.

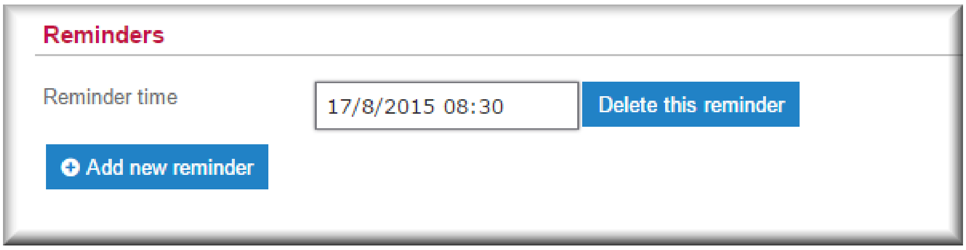
13 Click Save and Close.
The activity is scheduled. You will receive a notification twenty four hours before the scheduled event.

You can also schedule an activity for a client in the edit case page. This can be a simple way to schedule a session for a new client. See Schedule activities if you're not sure how to do this.

Setting reminders for a practitioner activity

You can set yourself (and/or other participating staff) reminders for scheduled activities. You do this in the **Reminders** section of the activity record.

1 With the activity record in edit mode click Add new reminder.
*The **Reminder time** field displays.*



2 Click in the **Reminder time** field and select your desired reminder date and time.
The reminder is saved when you save the activity.

You can add more reminders for the activity if required. You can also change the reminder time as appropriate. To remove a reminder click Delete this reminder.

Rescheduling practitioner activities

If the planned time and date for an activity changes you can reschedule it. This will also reset the trigger for an SMS reminder if one was specified for the activity. If you have set a reminder for the activity for yourself you can reschedule that as well:

1 From the **Operations** menu select **My Activities**.
*The **My Activities** list displays.*

2 In the list, locate the activity you want to reschedule and click  to open it in edit mode.

3 In the the **When** field, select the new date and time for the activity.

4 **IF** you set a reminder for yourself for the activity, in the **Reminders** section, in the **Reminder time** field select the new date and time for the reminder.

5 Click **Save and Close**.
The activity is rescheduled.

Completing a scheduled activity for a practitioner case

To complete a scheduled activity you change the activity status to **Completed**, record the relevant direct, indirect and travel times for the activity, and add a note.

Click to view a [video demonstration of how to complete a scheduled activity](#).

To locate the activity you want to process you can access it from:

- Your **My Activities** list or calendar
- The **Activities** tab of the case record
- The **Activities** section of the **Details** tab of the case record
- Your activities reminders.

If you are processing the scheduled activity for someone else you access the activity from the case record.

1 Using one of the methods described above locate the activity you want to complete.

2 Click to edit the activity.
The activity opens in edit mode.

3 In the **New notes** field enter a note to describe the completed activity.

4 In the **Status** field, select **Completed**.
The **Timesheet** *displays at the bottom of the page. If you specified a duration for the activity this value now displays in the* **Direct Time** *field.*

5 In the **Timesheet** specify direct, indirect and travel time as applicable.

6 Click Save and Close.
The activity is completed. The notes you wrote for the activity display in the **Previous notes (read only)** field.

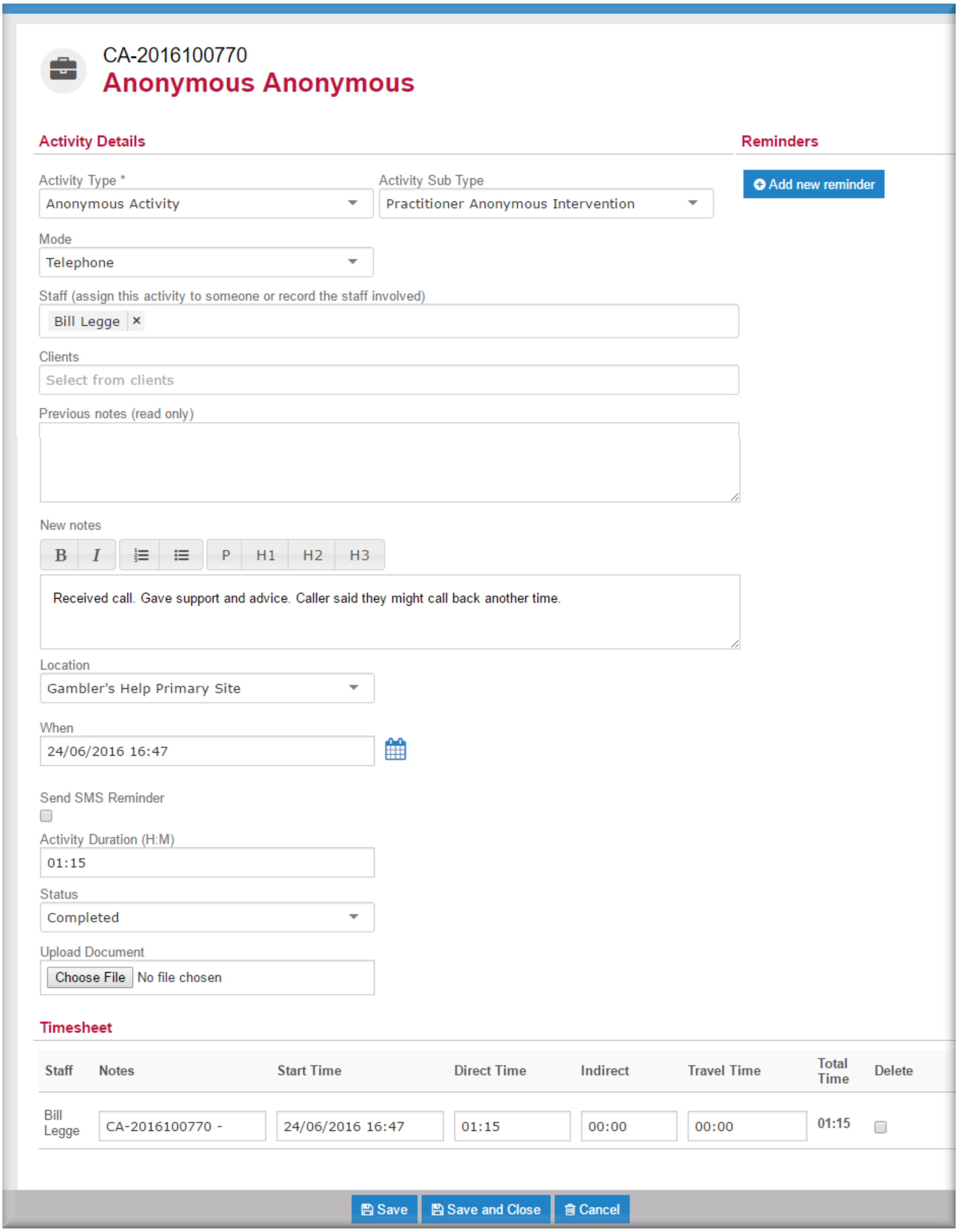
Processing an anonymous practitioner activity

You should always process an anonymous activity as part of recording the anonymous case.

There should never be more than one activity recorded against an anonymous case – even if the anonymous client re-presents and you know it is the same person, you should still create a new anonymous case and activity.

1 Complete the anonymous case and click Save and Close.

2 Click in the **Activities** section of the case page.
The activity screen for the anonymous case displays.



3 In the **Activity Type** field, select **Anonymous Activity**.

For anonymous cases you only ever use the Anonymous Activity.

4 In the **Activity Sub Type** field, select the **Practitioner Anonymous Intervention**.

5 In the **Mode** field, select the activity mode.

6 In the **New notes** field, enter a description of the anonymous case and the activity.

In your notes about an anonymous activity you NEVER enter any information that can identify the client – they haven't given their consent!

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

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

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

10 In the **Timesheet** enter the time you worked on the activity.

11 If appropriate, enter time you travelled for the activity in the **Travel Time** field.

12 Click Save and Close.

Processing practitioner activities with multiple staff

Some of your activities might involve more than one person working with the client. Group sessions also might involve participation of more than one practitioner.

If you want to add a colleague to the activity they must have an active Gambler's Help Connect *login at your service.*

When you initiate a new activity for a case, *Gambler's Help Connect* defaults your name in the **Staff** field. In multiple staff activities, you can add the names of the other participating counsellor(s) in this field. When you set the activity status to **Completed**, the timesheet displays a new line for each member of staff associated with the activity. You can enter all the times for all participating staff in the one activity.

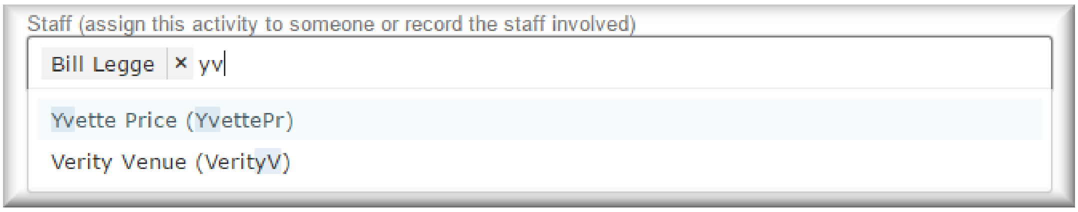
*The **Staff** field is a search field.*

To add a colleague to an activity:

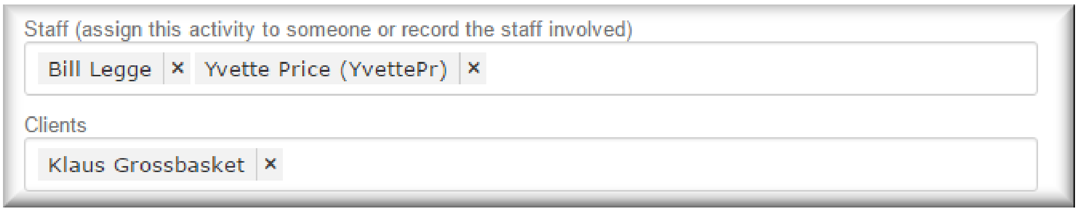
1 Open the activity for editing.
*The activity displays in edit mode with your name in the **Staff** field.*

2 Specify the activity type, subtype and mode.

3 In the **Staff** field enter the first few letters of your colleague's name.
A list of names matching the letters you entered displays.

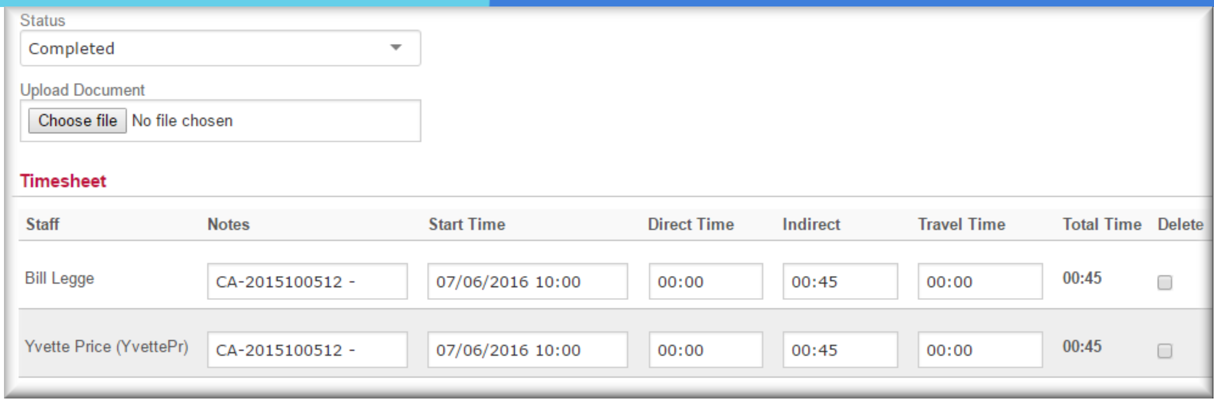


4 Select the name of your colleague.
*The name displays in the **Staff*** field.



5 Complete the other fields for the activity including notes, location, date and time.

6 In the **Status** field, select **Completed**.
*The **Timesheet** displays a line for each member of staff listed in the activity.*



7 Add the direct, indirect and travel times for each participating staff member.

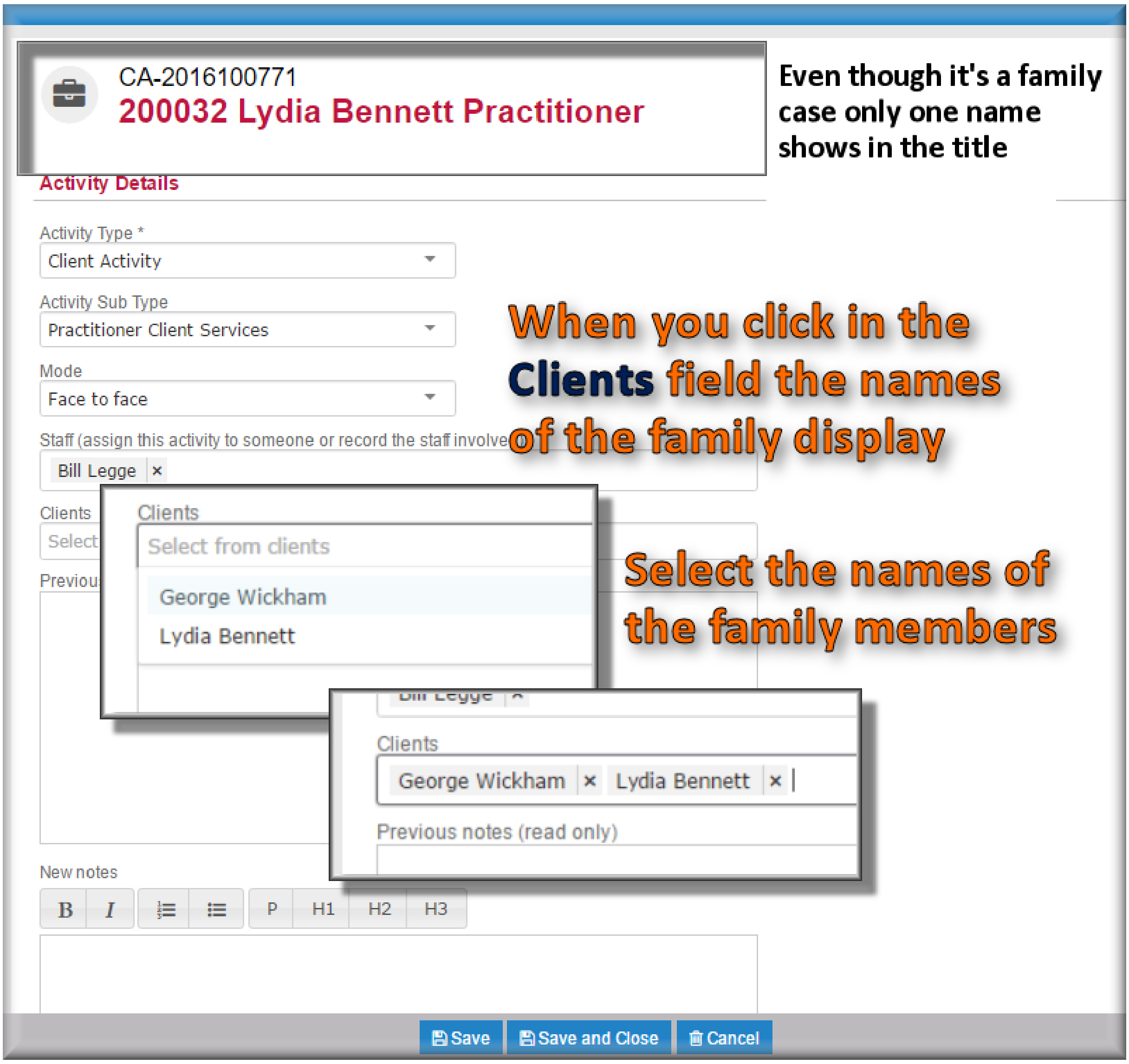
Times for different staff members don't have to be the same.

8 Click **Save and Close**.

Processing practitioner activities for a family case

A family case is the same as a standard practitioner case except that more than one client is associated with the case. When you record activities for family cases you need to select each client associated with the case (who attended the activity).

1 Locate the case and start a new activity as you would for any other practitioner case.
*The activity page displays but the clients' names do not show in the **Clients** field.*



2 Click in the **Clients** field.
A list of the clients associated with the case displays.

3 Select the clients you want to record against the activity.
*The names display in the **Clients** field.*

4 Complete all the other fields and process the activity as you would for any other practitioner activity.

See <u>Processing an unscheduled activity for a practitioner case</u> if you're not sure how to do this.

Processing activities for practitioner group case sessions

Group case activities do not have subtypes. There are only three activity types against which you record your efforts in running group cases:

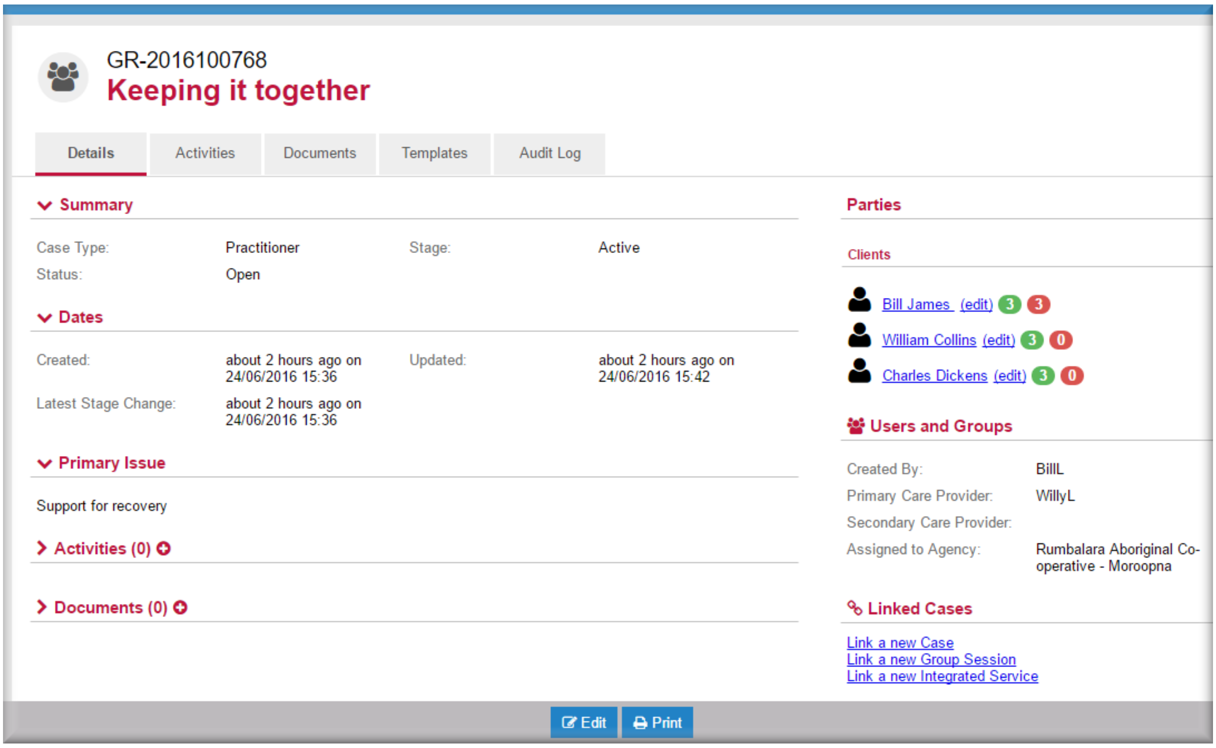
- **Session** – covers all the work you do both direct and indirect time in actually running group sessions
- **Preparation** – covers all the work you do in *program* development and maintenance
- **Administrative** – covers all the work you do in managing and administering the group case.

You can schedule group sessions as for other activity types. This will also allow you to ensure clients who have consented will receive SMS reminders of upcoming sessions.

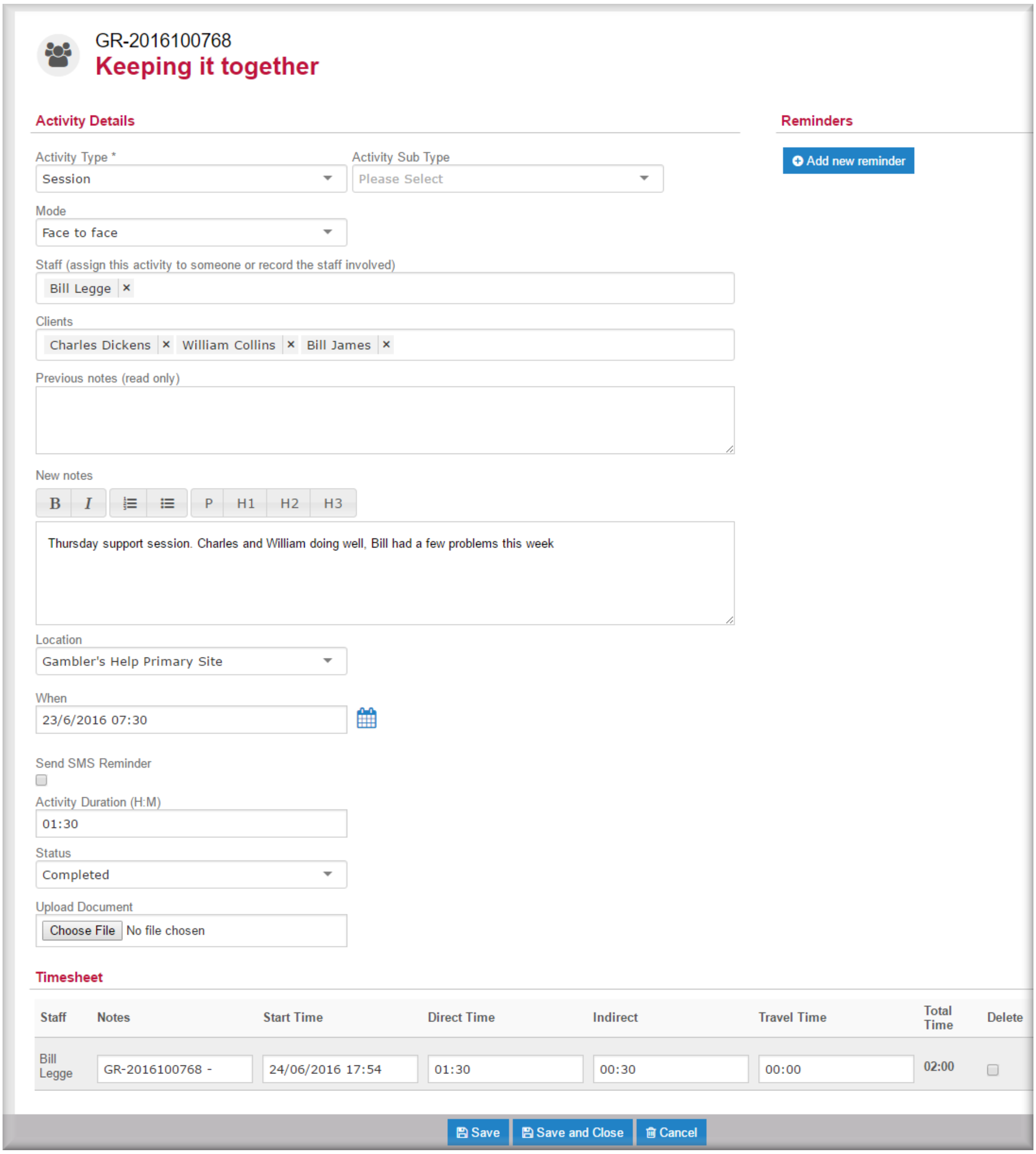
This procedure is the same for anonymous group cases except in an anonymous group there are no client names to select.

To process an activity for a group case:

1 Open the group case record.



2 Click in the **Activities** section to open a new activity page.
*The primary and secondary care providers for the case display in the **Staff** field.*



3 Select the **Activity Type** and **Mode**.

4 In the **Staff** field, check that the correct care provider names display. Add or remove staff from the activity as required.

5 Click in the **Clients** field.
The client list for this case displays.

If you are recording a preparation or administration activity for the group, you only need to select clients if the activity related directly to that person. For example, "sent invitations" (don't bother about selecting clients), but "Rang Joe to remind him about the session", (select Joe).

6 From the list in the **Clients** field, select each client who attended the session.

7 In the **New notes** field enter your notes for the activity.

8 Select the location, and date and time.

9 **IF** this was a session, enter the duration of the activity in the **Duration** field.

10 In the **Status** field, select **Completed**.
The **Timesheet** *displays.*

11 Specify the direct, indirect and travel time for each of the participating staff.

12 Click Save and Close.

Cancelling a scheduled practitioner activity

You cancel activities by changing the status:

1 From the **Operations** menu select **My Activities**.
*The **My Activities** list displays.*

If it's not your activity, you can locate it via either a case or activity search.

2 In the list, locate the activity you want to reschedule and click to open it in edit mode.

3 In the **New notes** field, enter a note explaining the reason for the cancellation.

4 In the **Status** field, select **No action required**.

5 **IF** you set a reminder for yourself for the activity, in the **Reminders** section click Delete this reminder

6 Click Save and Close.
The activity is cancelled.

Cancelling a saved practitioner 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 saved activity:

1 Open the case record containing the activity you want to cancel.

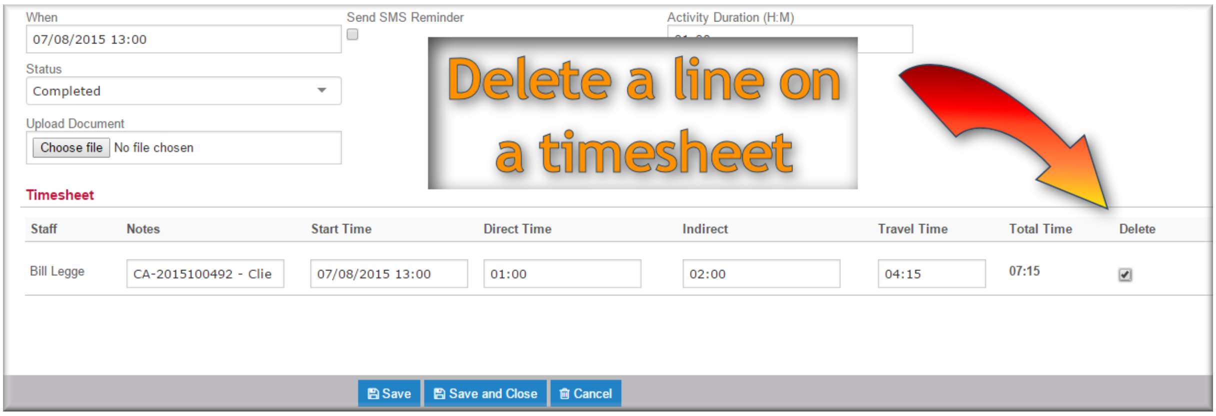
2 Select the **Activities** tab.

3 In the activities list, locate the activity and click .
The activity record opens in edit view.

4 In the **New notes** field, enter a note explaining the cancellation.

5 In the **Status** field, select **No action required**.

6 In the **Timesheet**, select **Delete**.



7 Click Save and Close.

*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.*

Recording a no show for a practitioner activity

Clients will sometimes fail to attend appointments without notice. When this happens you need to record a no-show. If you had scheduled the appointment then you process that as a no show. If you were planning on recording the activity after the event you create a new activity to record the no show. In either case, a no show automatically records 15 minutes of indirect time. If there was any travel time you should add it to the activity.

Recording a no show against a scheduled activity

1. From the **Operations** menu select **My Activities**.
   *The **My Activities** list displays.*

   If it's not your activity, you can locate it via either a case or activity search.

2. In the list, locate the activity and click to open it in edit mode.
3. In the **New notes** field, enter a note recording the no show.
4. In the **Status** field, select **No Show**.
   *The **Timesheet** displays with 15 minutes in the **Indirect time** field for each member of staff associated with the activity.*
5. Add travel time to the timesheet if appropriate.
6. Click Save and Close.
   The no show is recorded.

Recording a no show as a new activity

If there was no scheduled activity for the missed appointment you must record a no show activity:

1. Open the case record.
2. In the **Activities** section click .
   A new activity screen displays.
3. Select the activity type, sub type and intended mode.
4. If required, in the **Staff** field add any other staff who planned to attend the activity.
5. In the **New notes** field, enter a note recording the no show.
6. In the **Location** field select the location where the activity was intended to take place.
7. In the **When** field specify the date and time when the activity was intended to take place.

8 In the **Status** field select **No Show**.
*The **Timesheet** displays with 15 minutes in the **Indirect time** field for each member of staff associated with the activity.*

9 Add travel time to the timesheet if appropriate.

10 Click Save and Close.
The no show is recorded.

Attaching documents to practitioner activities

You can attach a *single* document to an activity where this is required. If you need to attach multiple documents to an activity, consider bundling the documents into a single file, or alternatively attach the documents to the case instead. You can do this when recording the activity, or you can open the activity in edit view at a later point and attach a document.

In the activity record in edit view:

1 In the **Upload Document** field, click Choose file.
A Windows Explorer window opens.

2 Locate the file you want to attach then click **Open** to attach the file.

Gambler's Help Connect *will allow you to attach most common file types including all MS Office and PDF files.*

3 Click Save and Close.

5 Managing practitioner cases

In addition to recording activities there are a number of procedures you might carry out in the practitioner case record:

- Recording your management of clients' issues
- Attaching documents to case records
- Using document templates
- Closing cases.

Managing issues in practitioner cases

Some clients who present to the Gambler's Help program have other issues that compound the impact of their gambling problems.

You can record these issues in the case and provide additional important information for your colleagues who might also need to work with the client.

See Managing issues for more information.

Managing documents for practitioner cases

You can attach documents of most common file types to a case record as needed. Using the **Documents** keyword search you can search for documents by any words in the document filename, title or description. There is no limit to the number documents you can attach to a case.

See Managing documents for more information.

Using document templates

In the **Templates** tab of the case record are a series of document templates you can use when you need to create a printed document based on some aspect of the case. The templates extract relevant information from the case or client record to populate the document, for example, client name, UR number, address or date of birth.

See Using document templates for more information.

Closing cases

It's good practice to close a case when it is no longer active. If a client re-presents after an interval, it is better to create a new case than to re-animate an old one.

You close a case when:

- Your program with the client is complete
- A client has disengaged from the program
- There has been no contact with the client for more than three months.

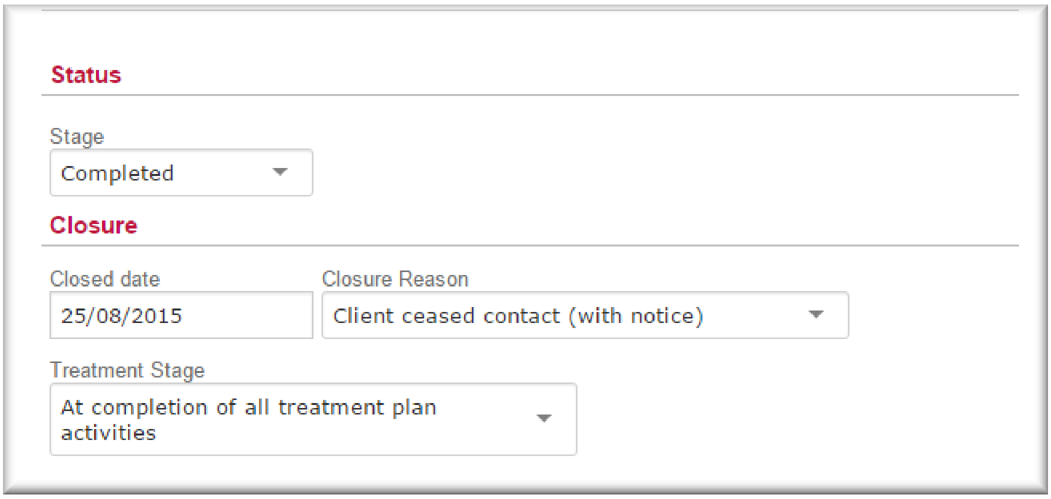
Case closure statistics are important to our shared understanding of the Gambler's Help program. They help us understand our client's trajectory to and through the program.

Before closing a case you should cancel or complete any open activities. If the client has not been in contact you might try to get in touch to find out whether they want to finish their service.

Closing a practitioner case

You close a case by changing the case stage. When you have completed all necessary preparations:

1. Open the case you want to close and click Edit.
2. In the **Status** section in the **Stage** field, select **Completed**.

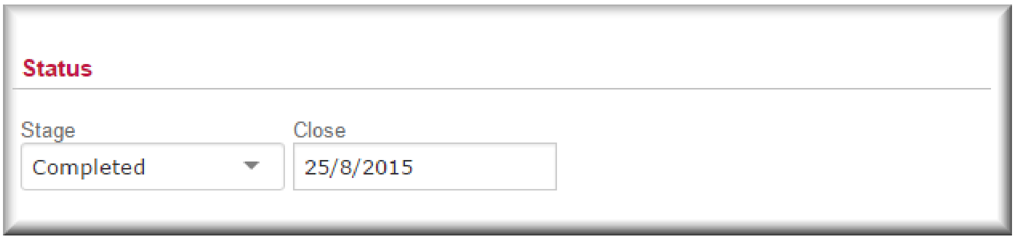


3. In the **Closure** section, in the **Closed Date** field, select the closure date.
4. In the **Closure Reason** field, select the reason.
5. In the **Treatment Stage** field, select the treatment stage.
6. Click Save and Close.
7. Record a case type activity for case closure.
8. Click Save
   *The case is closed and no longer displays in your **My Cases** list.*

Closing a group case

Closing a group case is a very simple process:

1 Open the case you want to close and click Edit.



2 In the **Status** section, in the **Stage** field, select **Completed**.

3 In the **Close** field, select the closure date.

4 Click Save and Close.

5 Record an administrative type activity for the group case closure.

6 Click Save.
The group case is closed and no longer displays in your ***My Cases*** *list.*