# Gambler's Help Connect for telephone, therapeutic and financial counsellors

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## Document Information

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# Contents

# 1 Summary

This document describes the system processes used by therapeutic counsellors and financial counsellors at Gambler's Help local services and telephone counsellors at the Gambler's Helpline to record and manage client cases in *Gambler's Help Connect*.

## Scope

Gambler's Help Connect for telephone, therapeutic and financial counsellors includes the following:

- Key concepts
- Creating and referring client and case records
- Recording activities against cases
- Recording client outcome surveys (COS)
- Managing client cases.

This document *does not* include the following:

- Gambler's Help program rules and business processes
- Clinical procedures
- Procedures for providing financial counselling.

## Who should read this document?

This document is intended for telephone counsellors at the Gambler's Helpline and therapeutic and financial counsellors at Gambler's Help local services.

# 2 Introduction to Gambler's Help Connect for telephone, therapeutic and financial counsellors

Therapeutic counsellors, financial counsellors and telephone counsellors at the Gambler's Helpline use *Gambler's Help Connect* to record and manage *client cases*. This section describes how you do this:

- Key concepts of client cases
- Creating client cases for new clients
- Creating cases for re-presenting clients
- Case variants:
  - Callback cases
  - Anonymous cases
  - Family therapy cases
  - Group cases
  - Recovery Assistance Program (RAP) cases
- Recording the client outcome survey (COS)
- Recording and managing client case activities
- Managing client cases:
  - Recording issues
  - Attaching documents
  - Using document templates
  - Closing cases.

# Client cases - key concepts

There are a number of concepts that underpin the design of *Gambler's Help Connect* that you should familiarise yourself with before you start using the system. Key concepts are:

- Global and local records:
  - **Global**: The client record available across the entire Gambler's Help program
  - **Local**: Case records restricted to the local Gambler's Help service where the client is receiving help
- Direct referrals from the Gambler's Helpline to local services
- The different types and sub-types of cases and the contexts in which you use them
- The organisation of local services in parent/child hierarchies.

## The single client record

In *Gambler's Help Connect* every client has a unique record available to all therapeutic or financial counsellors.

However, their *case* information including all case notes are restricted to the assigned agency. You *can* see whether a client has current or closed cases in other agencies but you *can't* see what activities were carried out in those cases or the case notes that might have been written. 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.

### Client and case records

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

Depending on the nature of the presentation and pathway the client wants to follow, you might need to add or update information about:

- The **client**, including:
  - Identity
  - Call back preferences
  - Address details
  - *Tags* – specific information about the client that anyone working with the record should be aware of, 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
  - The referral origin, destination and any other services the client is currently engaged with.

If the caller does not consent to you recording their personal details you still might 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.

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

## Client and case records – what's in them?

Here is a list of the client (global) and case (local) data that you record for a new client and case. When you record a client and case for the first time you are then facilitating that person's access to the entire Gambler's Help service.

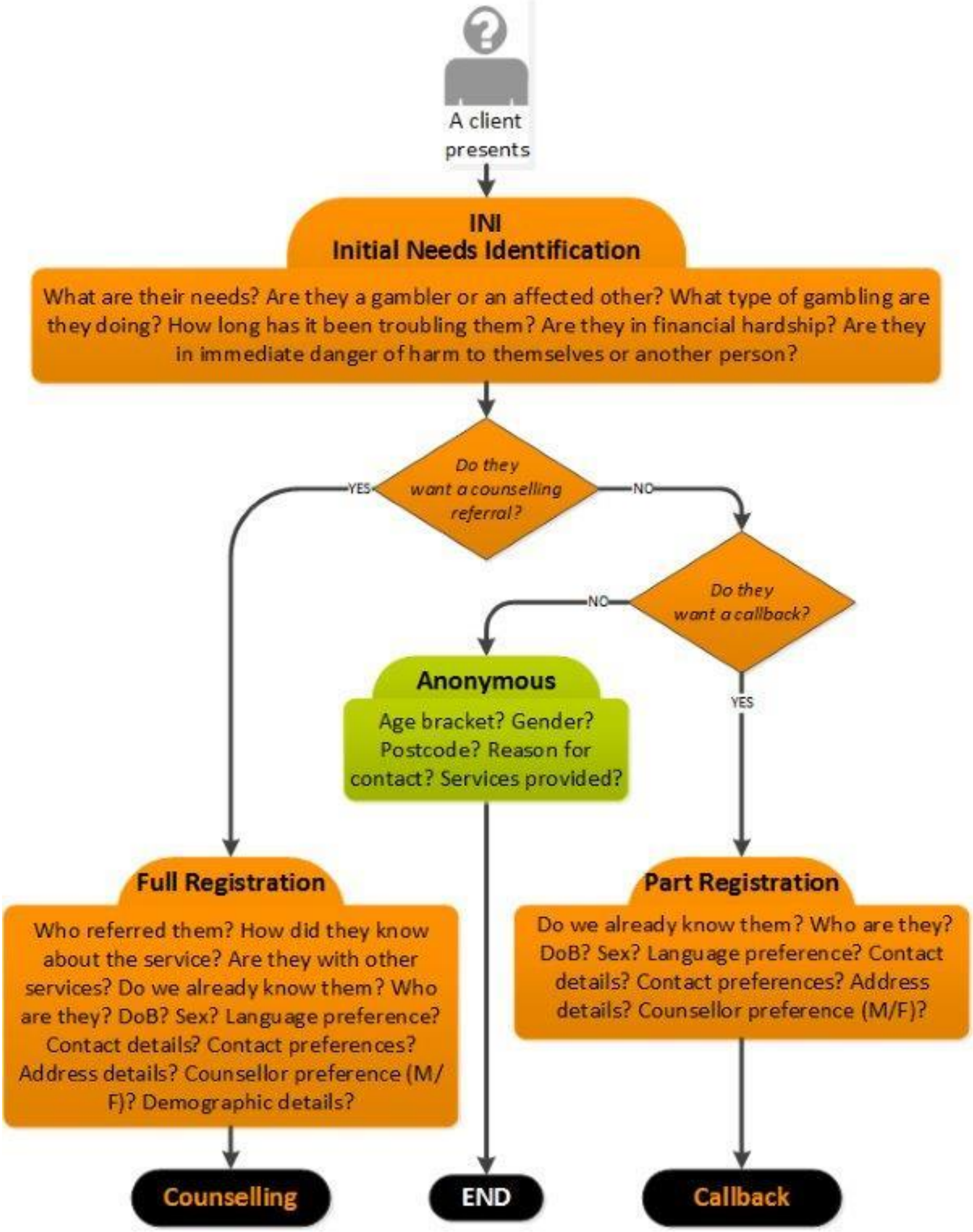
| Client record - global | Case record- local |
|---|---|
| Name | Gambler? |
| Date of birth | Relationship to gambler |
| Phone number(s) | Main gambling mode |
| Sex | Gambling type |
| Email | Duration of gambling problem |
| Language spoken at home | Do you have any debts? |
| Interpreter required? | Are you in arrears with debts? |
| Preferred mode of contact | Have you been contacted by credit providers? |
| Callback preference | Primary issue |
| Counsellor sex preference | Immediate danger of harm to self/other |
| Can message be left on voicemail? | Details of danger & response provided |
| If someone else can caller identify themselves? | Case type |
| Address details | Agency |
| Tags (used to be alerts) | Referred by |
| Tags description | Service awareness |
| Country of birth | Other non-gambler's help services client is in contact |
| Cultural identity | External referral to |
| Indigenous status | Issues (new and existing) |
| Marital status | Primary care provider |
| Education level | Secondary care provider |
| Household type | Status – Stage |
| Employment status | Closed date |
| Occupation group | Closure reason |
| Annual income | Treatment stage (at closure) |
| Agree to receive SMS communications? | Started date |
| Agree to receive email communications? | Received date |
| Justice clients | Received by |
| Self-exclusions | Case links |
| Client outcome surveys | Clinical notes |
| | Client satisfaction |

## The pathway to service

While every person who seeks the support of Gambler's Help has a unique story to tell and a unique way to tell it, the outcome of a client presentation will be one or more of:

- Referral to therapeutic counselling or financial counselling at a local service
- Referral for a follow up call from a local service – a "callback"
- Facilitated referral to another service altogether
- Anonymous service.

The diagram below illustrates the client pathway to service and the possible variations.


A client presents
INI
Initial Needs Identification
What are their needs? Are they a gambler or an affected other? What type of gambling are they doing? How long has it been troubling them? Are they in financial hardship? Are they in immediate danger of harm to themselves or another person?
Do they want a counselling referral?
YES
NO
Do they want a callback?
NO
YES
Anonymous
Age bracket? Gender? Postcode? Reason for contact? Services provided?
Full Registration
Who referred them? How did they know about the service? Are they with other services? Do we already know them? Who are they? DoB? Sex? Language preference? Contact details? Contact preferences? Address details? Counsellor preference (M/F)? Demographic details?
Part Registration
Do we already know them? Who are they? DoB? Sex? Language preference? Contact details? Contact preferences? Address details? Counsellor preference (M/F)?
Counselling
END
Callback

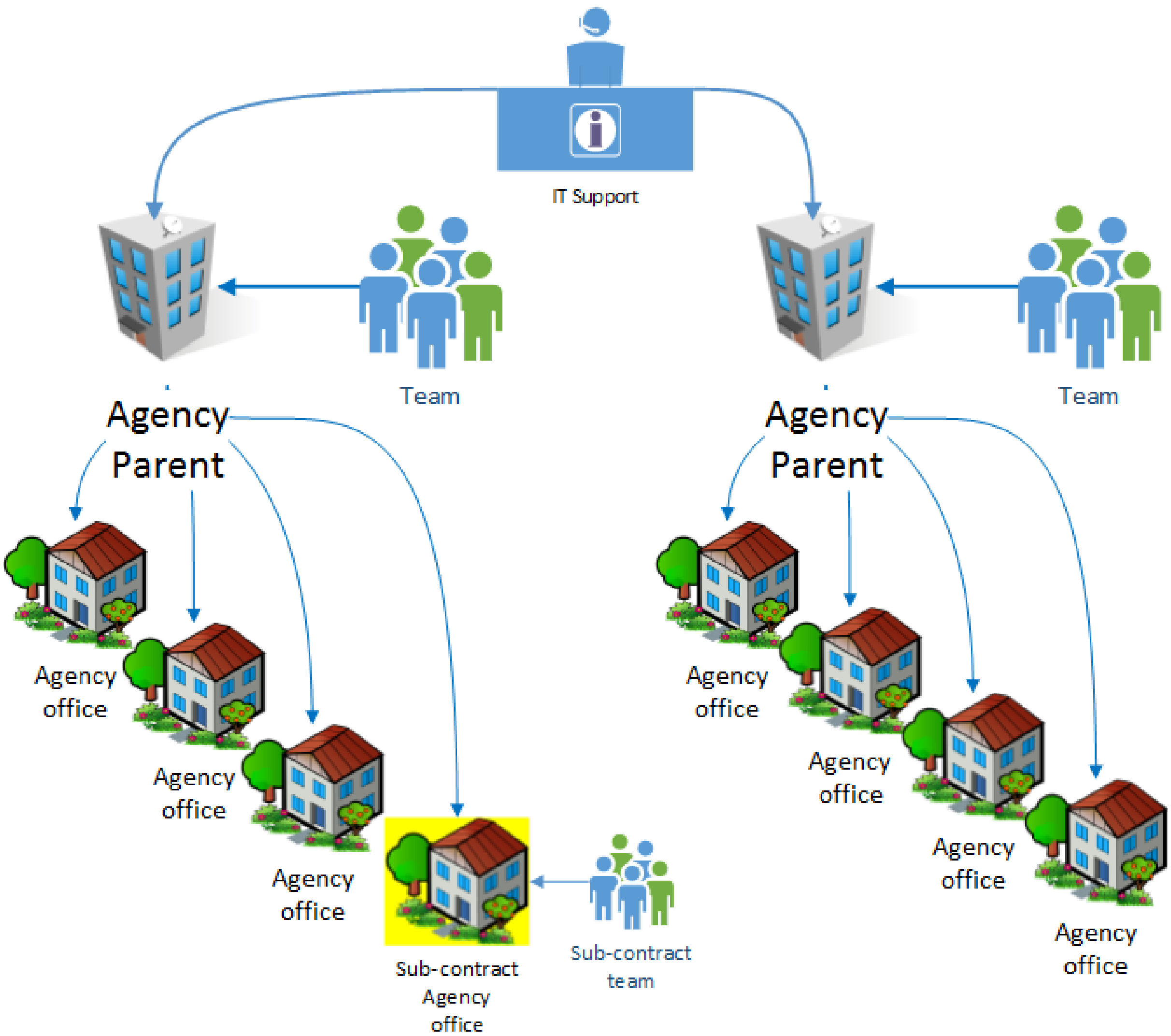
## Agencies and teams

In *Gambler's Help Connect* teams are structured in a hierarchy of parent and child. Your agency is the 'parent' agency and each of your Gambler's Help offices are 'child' agencies.

Your user ID is associated with your parent agency, which means that you can see all the cases for clients at your agency.

The **exception** to this is where your agency is a subcontractor to another agency. (There are three such subcontractor agencies). The subcontracting agency is registered as a child of the contracting parent but your user ID is associated with the subcontracting child. This means that you can only see (and work with) the cases that are registered to your subcontracting agency. As noted before, **all** users can see **all** clients.

Here is an illustration showing the hierarchy.



# 3 Creating case and client records

In *Gambler's Help Connect* every client record should be associated with at least one case record. Client records can have multiple cases associated with them both concurrently and sequentially.

*See Types of cases for more information about case types.*

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

- Therapeutic or financial counselling cases
- Callback cases
- Anonymous cases
- Family cases
- Group cases
- RAP cases
- Linking cases.

*Family cases are not, strictly speaking a separate case type, rather they are a variation on the single client therapeutic or financial counselling case.*

## Therapeutic or financial counselling cases

In *Gambler's Help Connect* there are number of different ways you can create new therapeutic or financial counselling case records depending on whether the client has an existing treatment history.

*The information in this section is primarily intended for intake workers at local service agencies and for telephone counsellors at the Gambler's Helpline since they are the ones who create most of the new cases. Many therapeutic or financial counsellors will receive cases that have already been wholly or partly created at the Helpline or local intake. Where this is the case the emphasis is more on ensuring that all case details are complete, (as far as possible), and correct.*

Where clients have a case history at *another* agency you can identify the counsellor and agency for the client record and can, if appropriate contact your colleague(s) at that agency for background information. The table below shows the different scenarios and the best approach to creating the new case.

| If… | Then |
|---|---|
| *The client has no treatment history in the Gambler's Help program.* | Create the new case from **Operations**: **New Case**.<br>See Creating a therapeutic or financial counselling case for a new client |
| *The client has a treatment history in the program but NOT at your agency.* | Create the new case from the **Create Case** +As Client link in the client record.<br>See Creating a case for a client with a history at another agency |
| *The client has a treatment history in the program at your agency.* | Create the new case from the **Create Case** +As Client link in the client record.<br>**OR**<br>Create the new case from the **Linked Cases** Link a new Case link in the most recent case record.<br>See Creating a case for a client with history at your agency |

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

## Creating a therapeutic or financial counselling 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. In this scenario, the best approach is to start the new case, then add the client record and then complete the case.

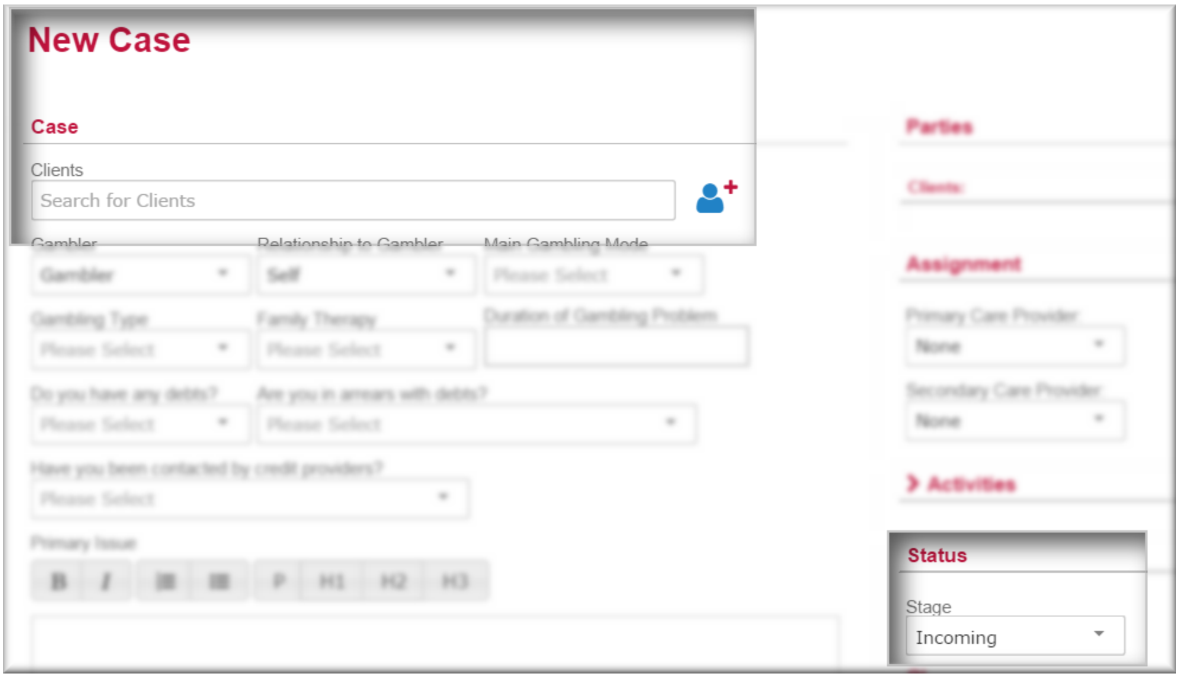
*View a demonstration of how to create a new case for a new client.*

Whenever you begin a new therapeutic or financial counselling 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 a minimum you need to 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.

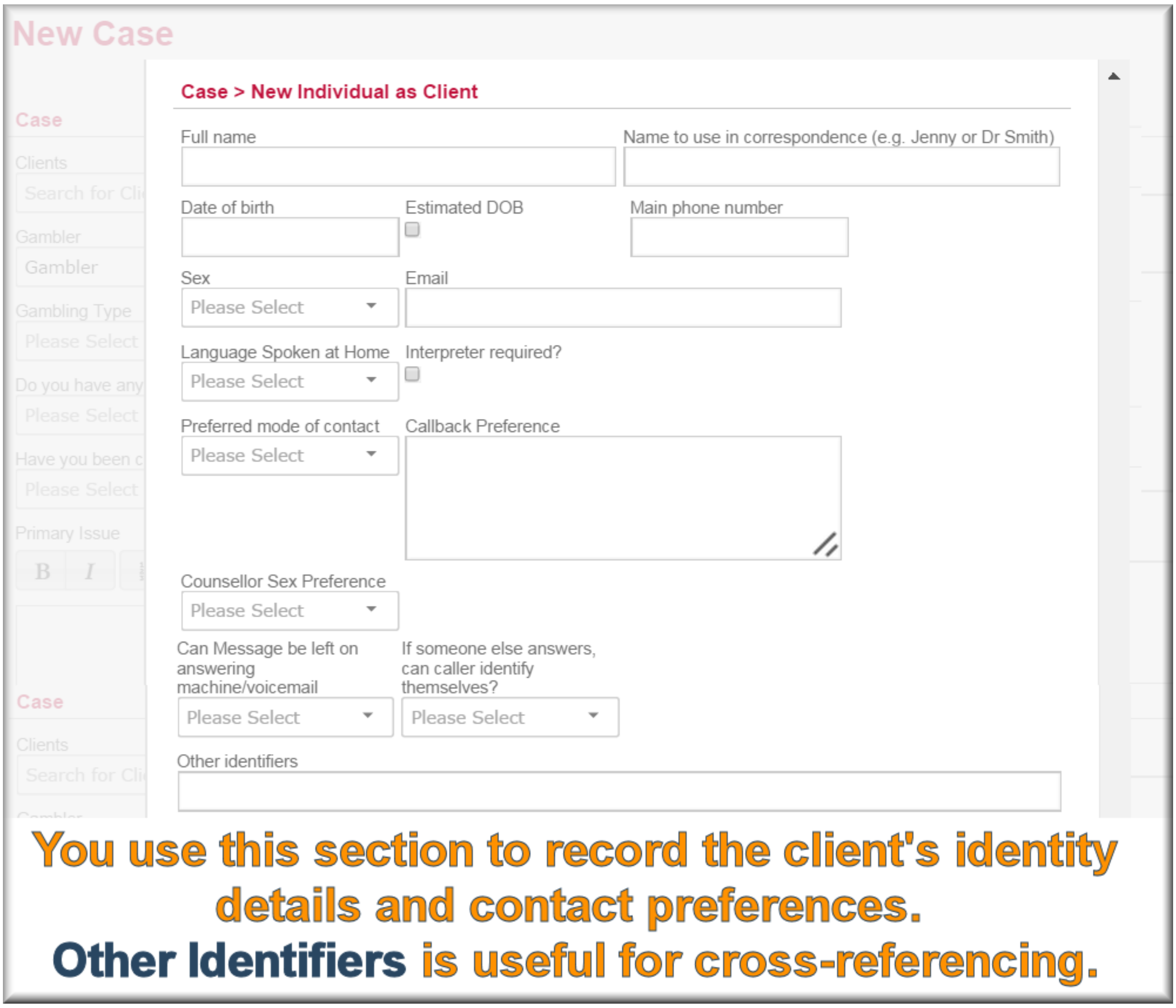
> *Completion of this section is essential both for therapeutic or financial counselling and callback cases.*

- *Counselling* – where you specify the address details for therapeutic or financial counselling clients as well as optionally including tags to alert all users of this client record to important attributes of the client such as a disability.
- *Other demographic information* – where you specify demographic and socio-economic descriptors of therapeutic or financial counselling 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 illustration of this screen is presented in sections for better viewing.*

## 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.

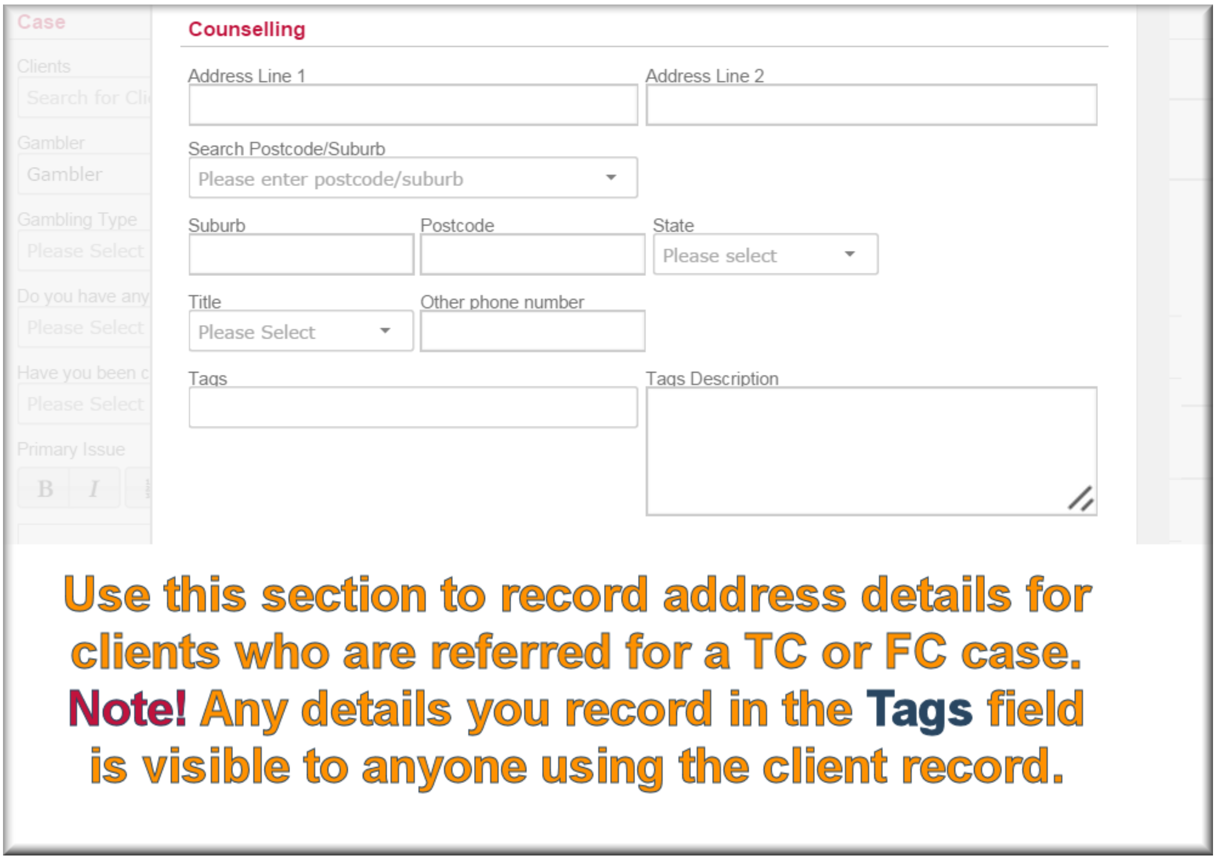
- **Sex**
- **Email**
- **Language Spoken at Home**.

**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 therapeutic or financial counselling cases and to add any relevant tags.




**1** 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.*

**2** Optionally, add:

- The client's street address in the **Address Line 1** field.
- The client's preferred **Title**.

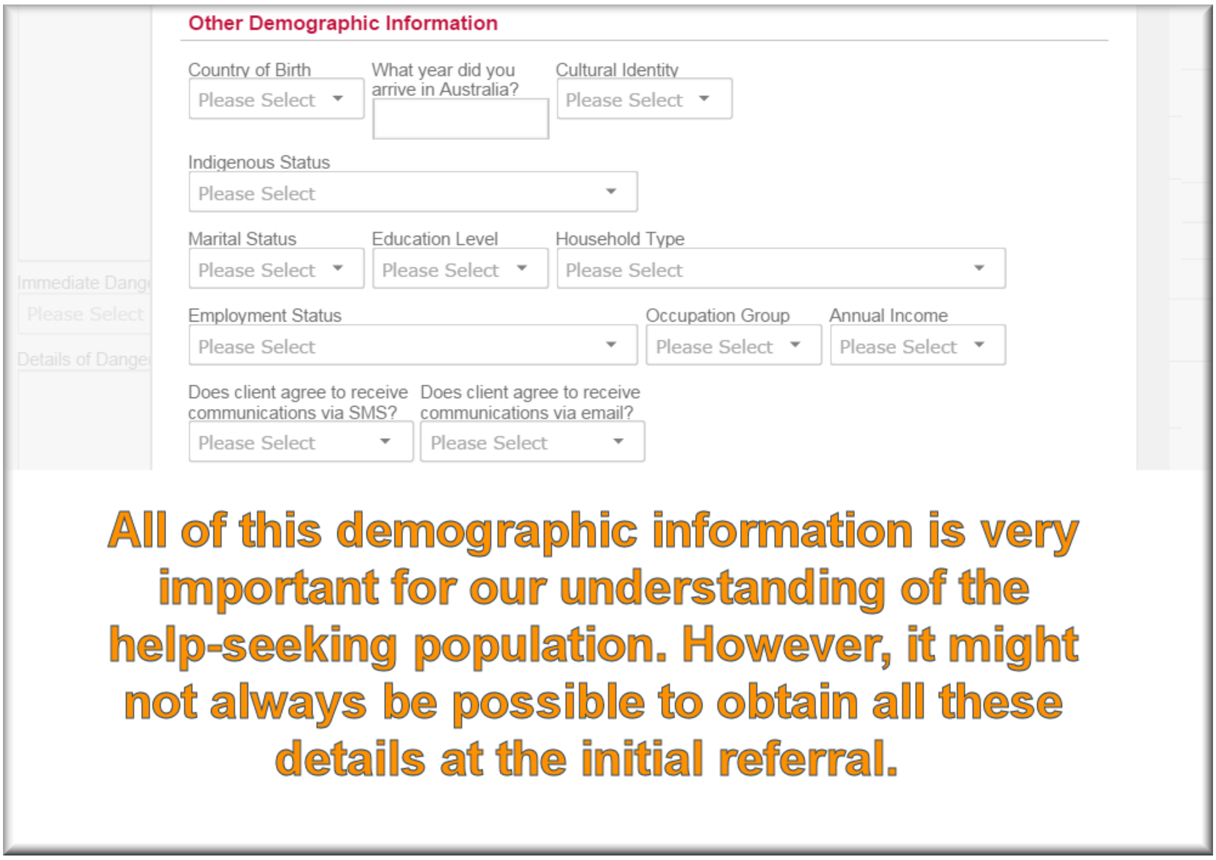
- An alternate phone number in the **Other phone number** field.

3 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, being applied to the client record, are visible to all* Gambler's Help Connect *users with a 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 establish the demographic profile of the client. It is understood that all this information might not be available when the client first presents, and the circumstances of the presentation might mean that seeking this information might not be appropriate at the time. However, the information you record in this section is critically important in adding to our collective understanding of the help-seeking population.




1 Complete the clients ethnicity details:

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

2 Complete the client's family details:

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

**3** Complete the client's employment and education details:

- **Education Level**
- **Employment Status**
- **Occupation Group**
- **Annual Income**.

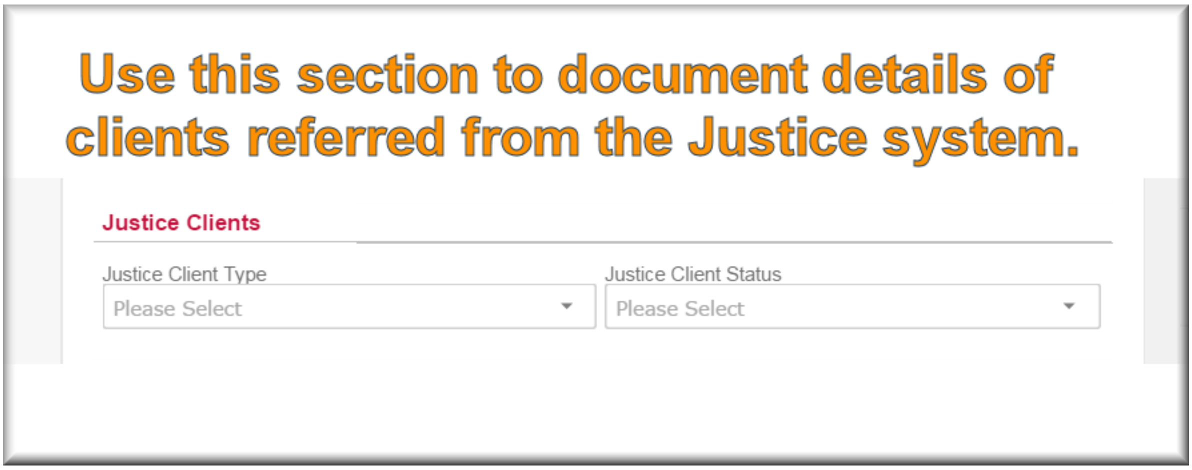
**4** Complete the client's communication preferences for appointment reminders:

- **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 via the justice system.

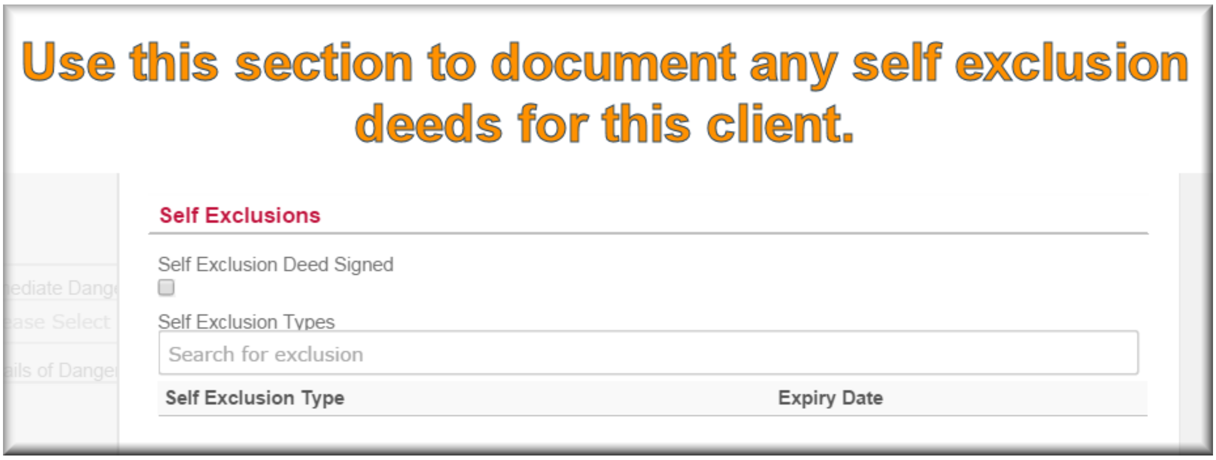



**1** **IF** the client was referred via the justice system, specify:

- **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.

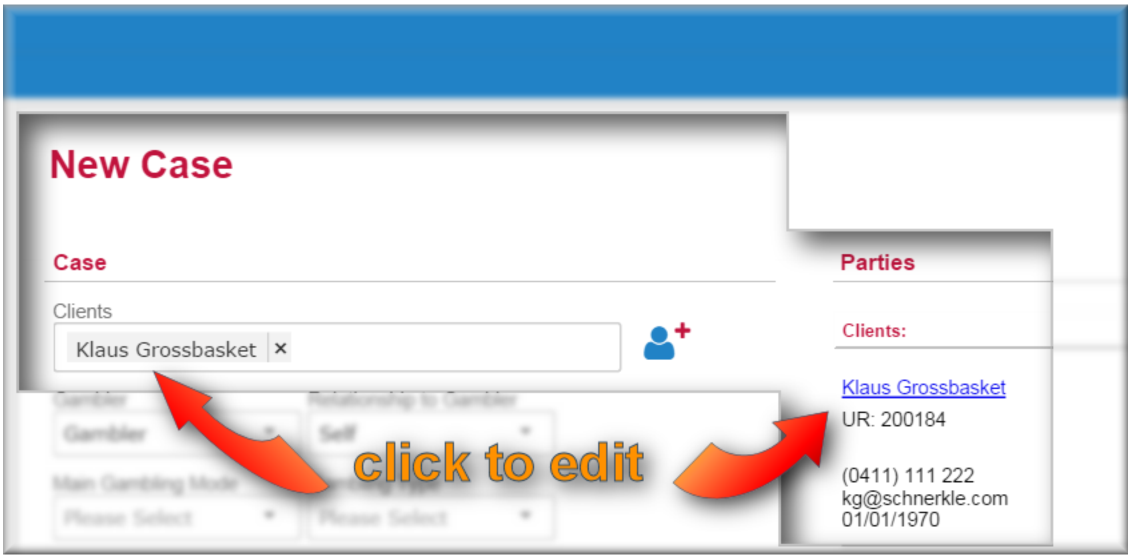



1 **IF** the client has a current deed of self exclusion:

- 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

1 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 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.

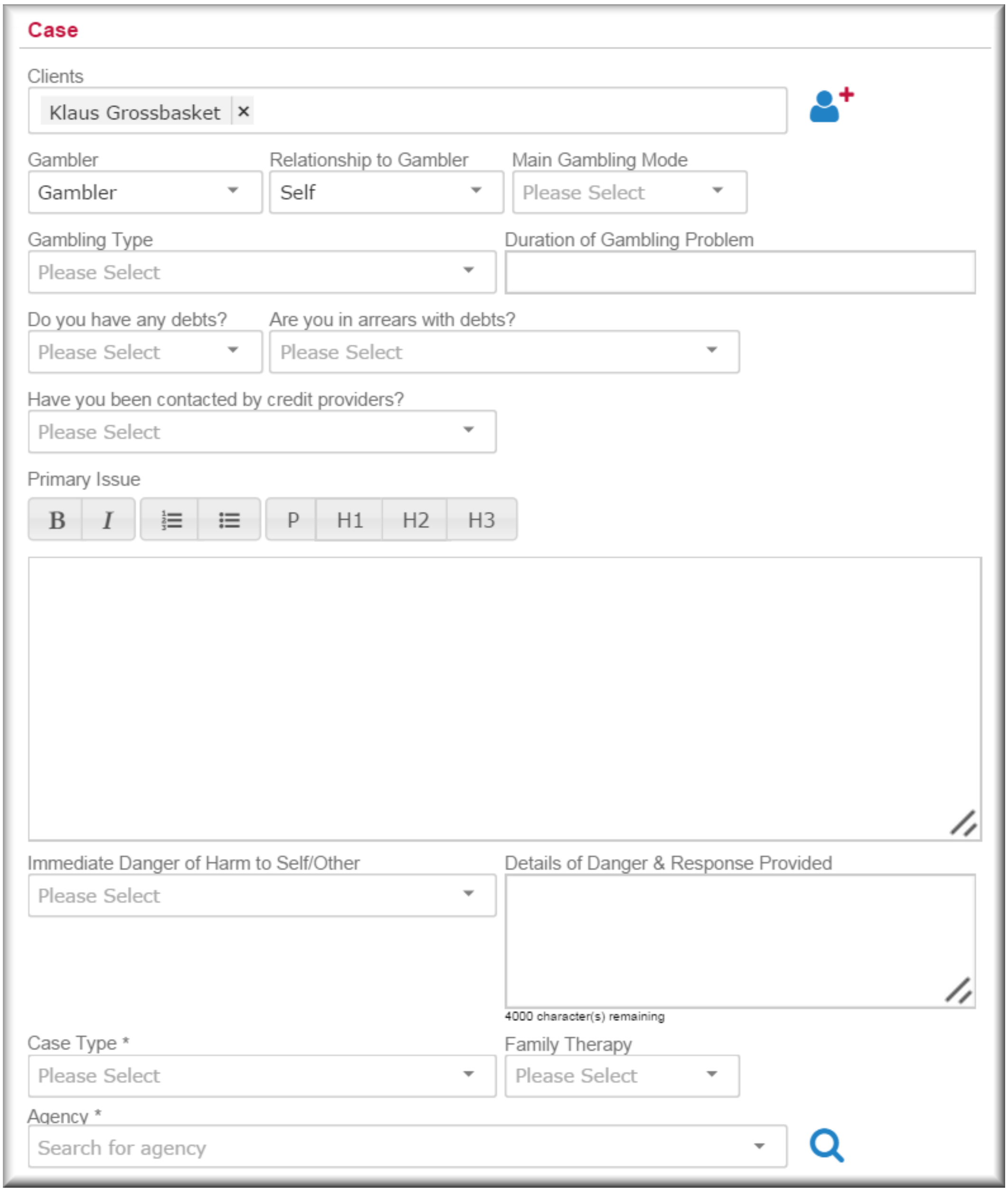
*Completion of this section (or as much as can be completed congruent with the needs of the client and context of the case) is essential for all therapeutic or financial counselling and callback cases. At a minimum you **must** specify the case type and agency.*

- **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.
- **Client Satisfaction** – telephone counsellors at the Gambler's Helpline record client feedback on their experience of the service.

## 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 more information about how you do this.*

**4** Choose an option:

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

**5** In the **Case Type** field select the case type.

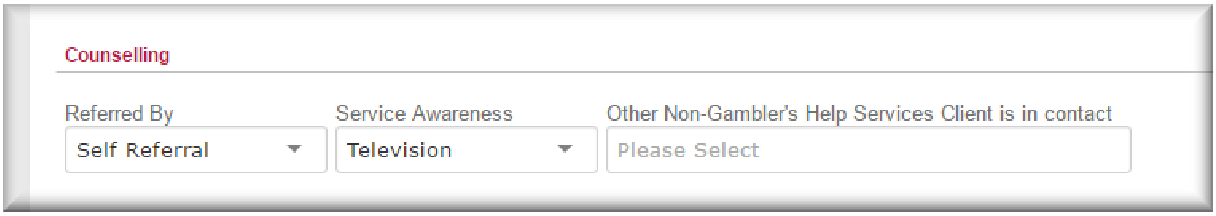
*See Family therapy cases* *for details on how to use the* ***Family Therapy*** *field.*

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

*You can click the icon next to the* ***Agency*** *field to search for an agency close to the client's address.*

## 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 came 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

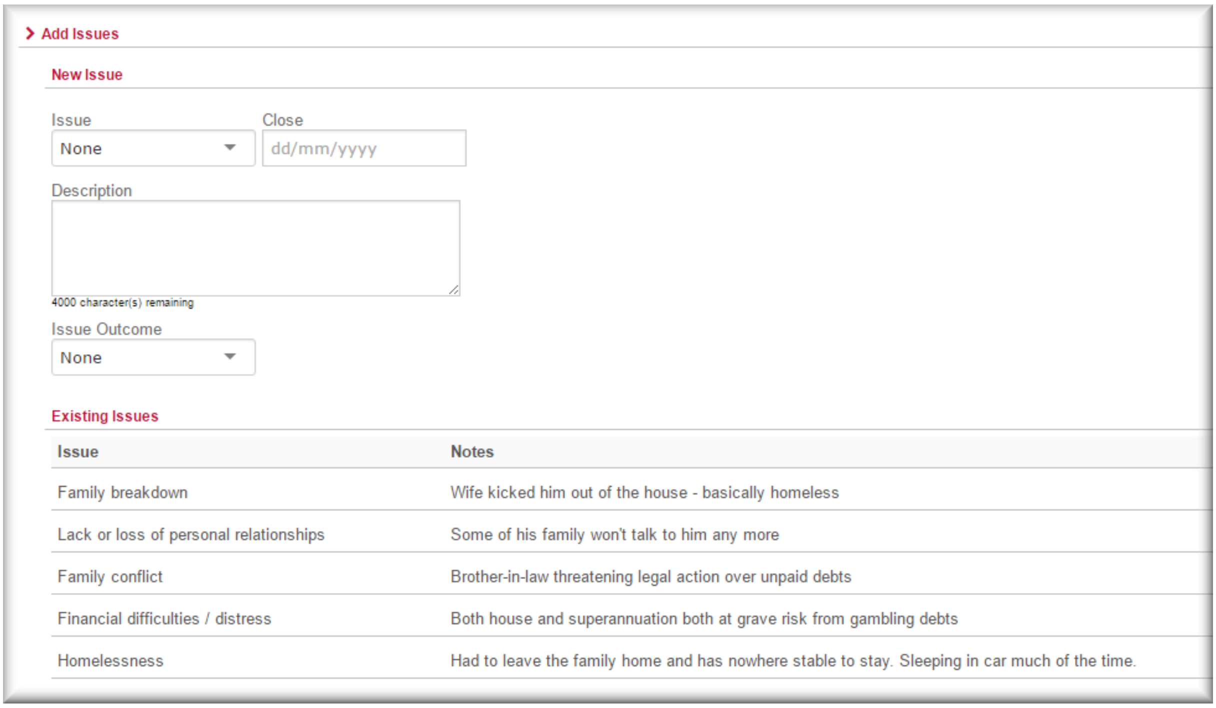
You use this section to document other services or programs that the client is connected with.


*You also use this section when you are creating a facilitated referral.*

1 **IF** you have facilitated a referral to an external service or program for the client as part of the intake, select the service type in the **Referred To** field – otherwise leave 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 that the case doesn't get 'lost in transit'. If your agency has a staged case allocation process then the intake worker should consider assigning themselves to the case until it's allocated to a therapeutic or financial counsellor.

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.

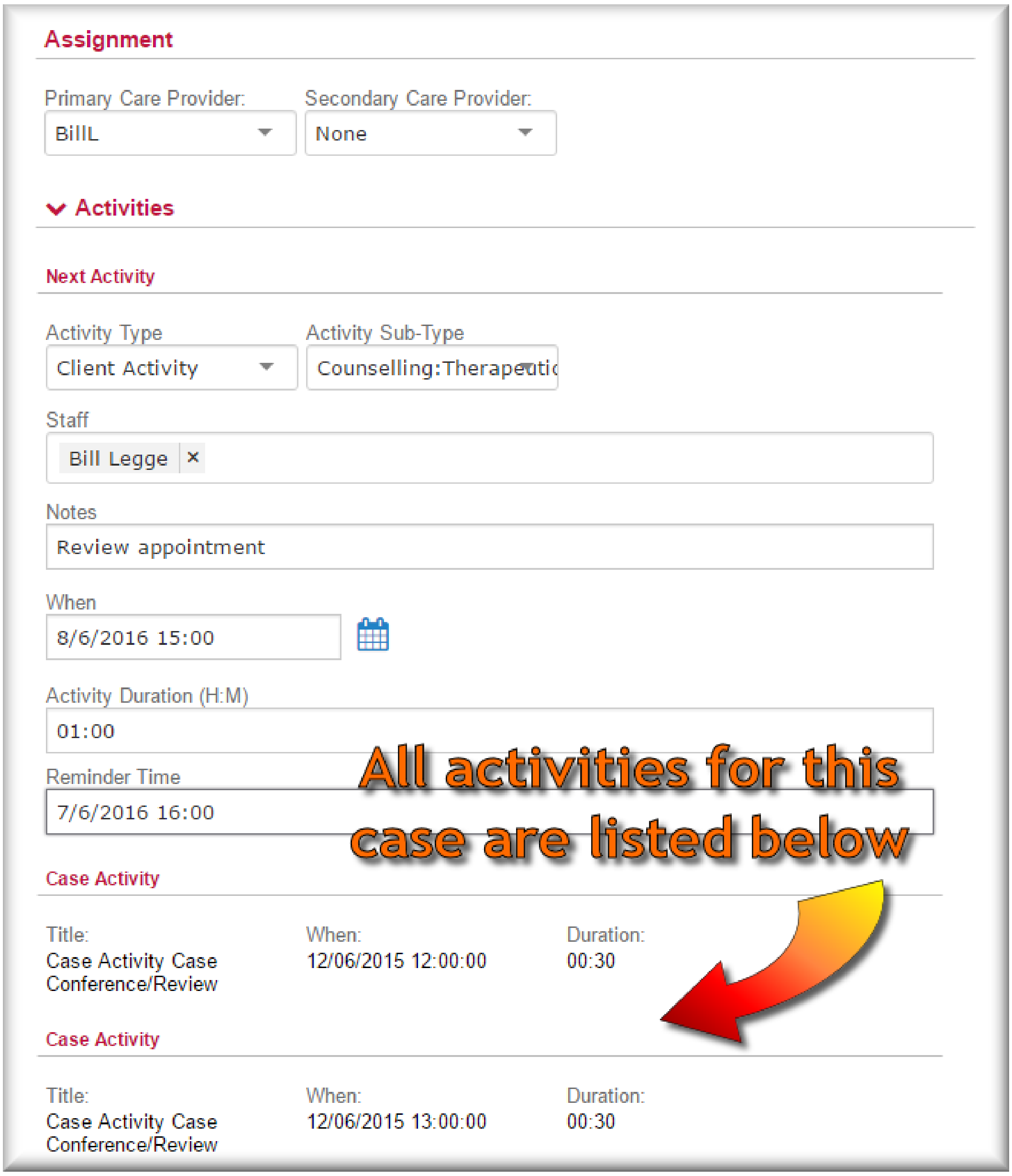
## Schedule activities

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 another counsellor 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:

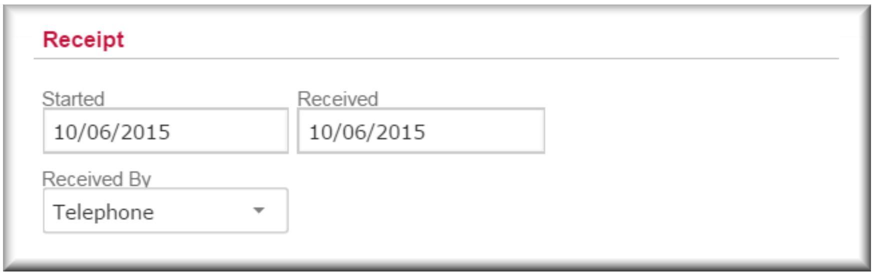
- **Acknowledged** – if you aren't ready to allocate the case
- **Assigned** – if you are handing the case off to a colleague for follow up
- **Accepted** – if you (or the nominated primary care provider) are ready to begin service with this case.

## 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 in the receiving agency.




*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.*

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

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

*If you are an intake worker or counsellor processing the referral at your local service, you should record an intake and registration activity to account for your time. See Processing an unscheduled activity for a therapeutic or financial counselling case if you’re not sure how to do this.*

# Creating a 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. This process applies to telephone counsellors at the Gambler's Helpline and to people doing intake at local services *other* than the one where the client has a case history.

## Conduct the client search

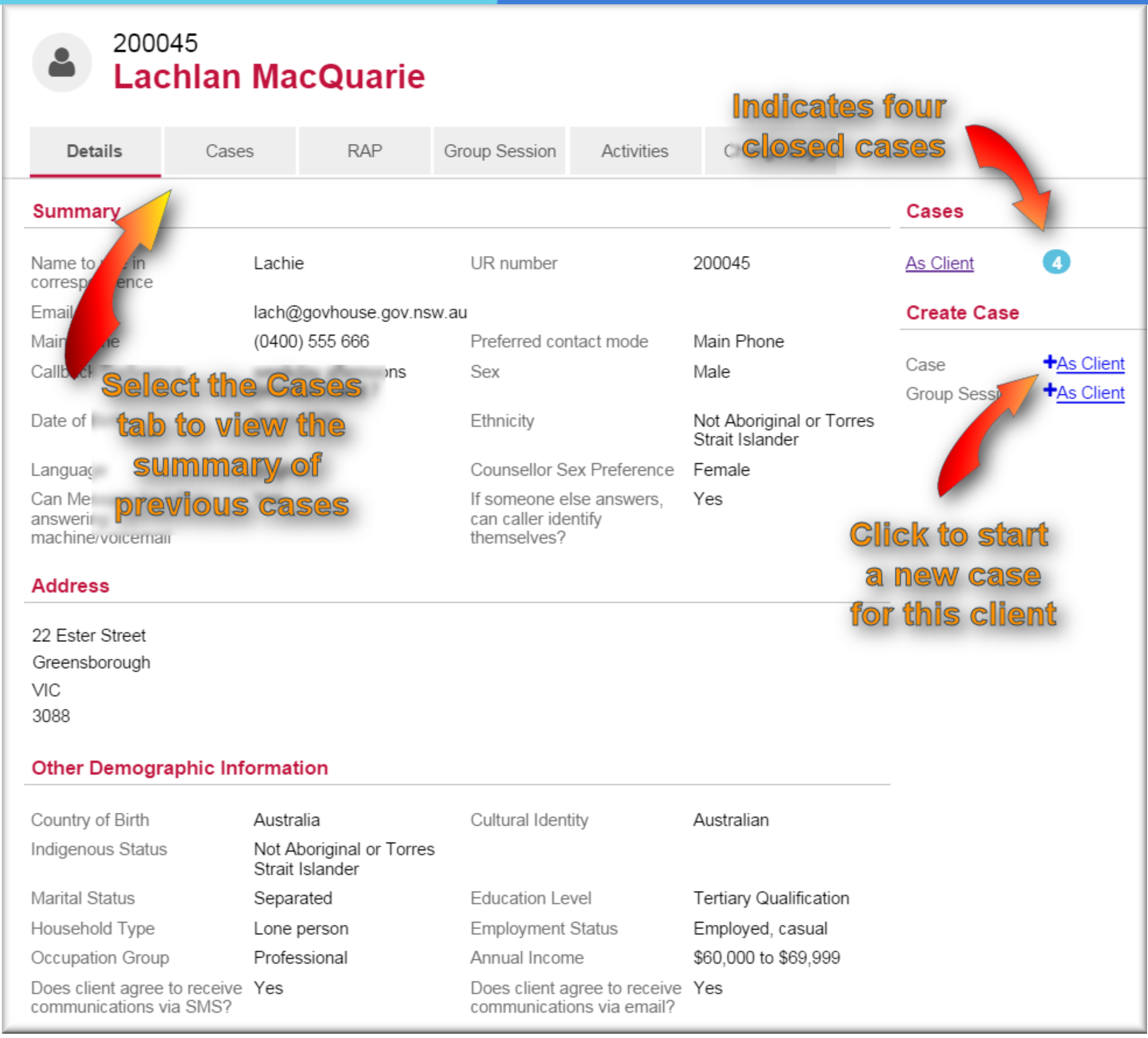
As with other new case activities you start by doing a client search to identify whether the client has a history with the program.

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

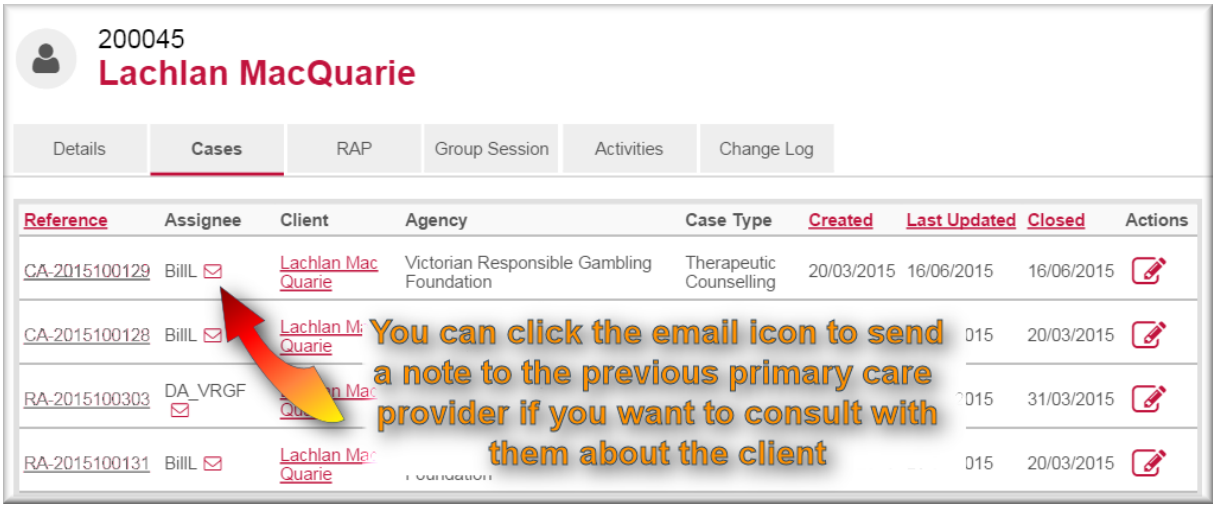
**1** Open the client record in view mode.

**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.

*If you are an intake worker or counsellor processing the referral at your local service, you should record an intake and registration activity to account for your time.*

# Creating a 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.

*You can also* link *a new case to another case at your agency – this might be a current case of another case type, or a previous case for that client. See [Linking cases].*

## 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.*

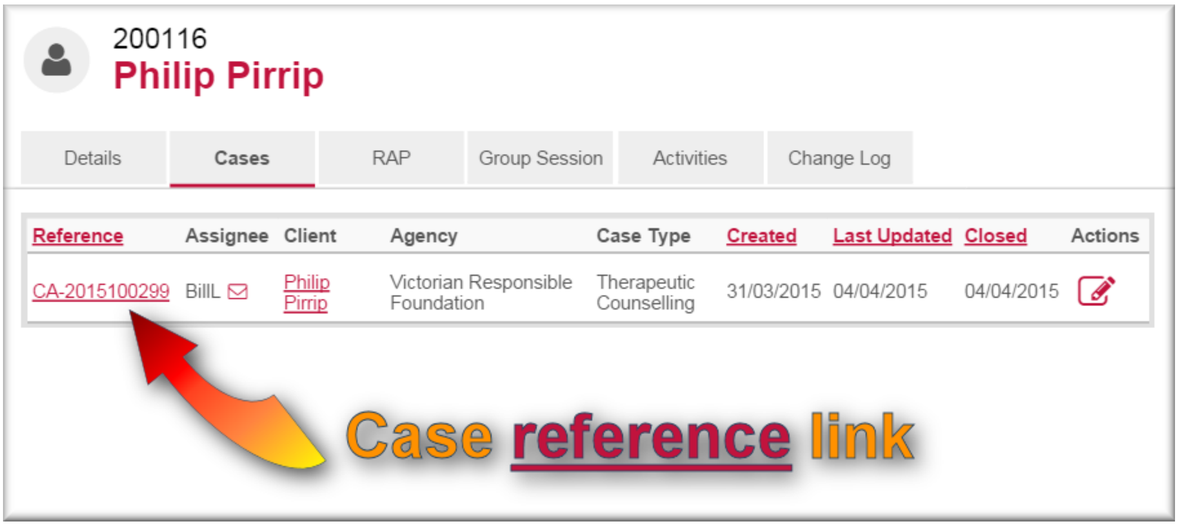
**3** Open the client record in view mode.

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

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

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

**7** 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.*




**8** 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.

*If you are an intake worker or counsellor processing the referral at your local service, you should record an intake and registration activity to account for your time.*

# 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 full therapeutic or financial counselling case and with an anonymous case. It is like a counselling case because you know who the client is but it is also like an anonymous case in that the contact with the client is limited.

It is anticipated that in some of these cases the person might gain sufficient confidence in the program to undertake counselling. Most of these cases originate with the Gambler's Helpline but some will also follow an initial contact with a local service.

## Creating a 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.

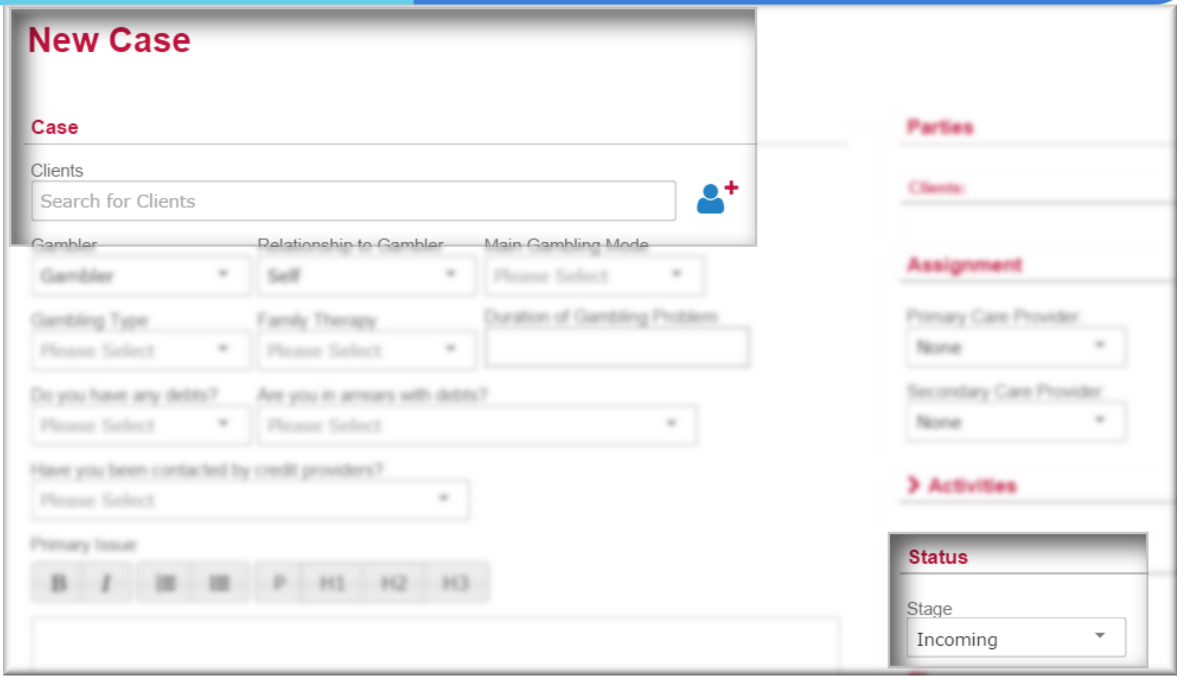
While it is probable that the person has no history with the program, it is still good practice to start with a client search to eliminate the possibility that they have an existing record – there is nothing to say that a person with a previous history in the program can't have a callback if that is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

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

As with a new case for a new client you must create the client record as well as the case record. In this scenario, the best approach is to start the new case, then add the client record and then complete the case.

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.*

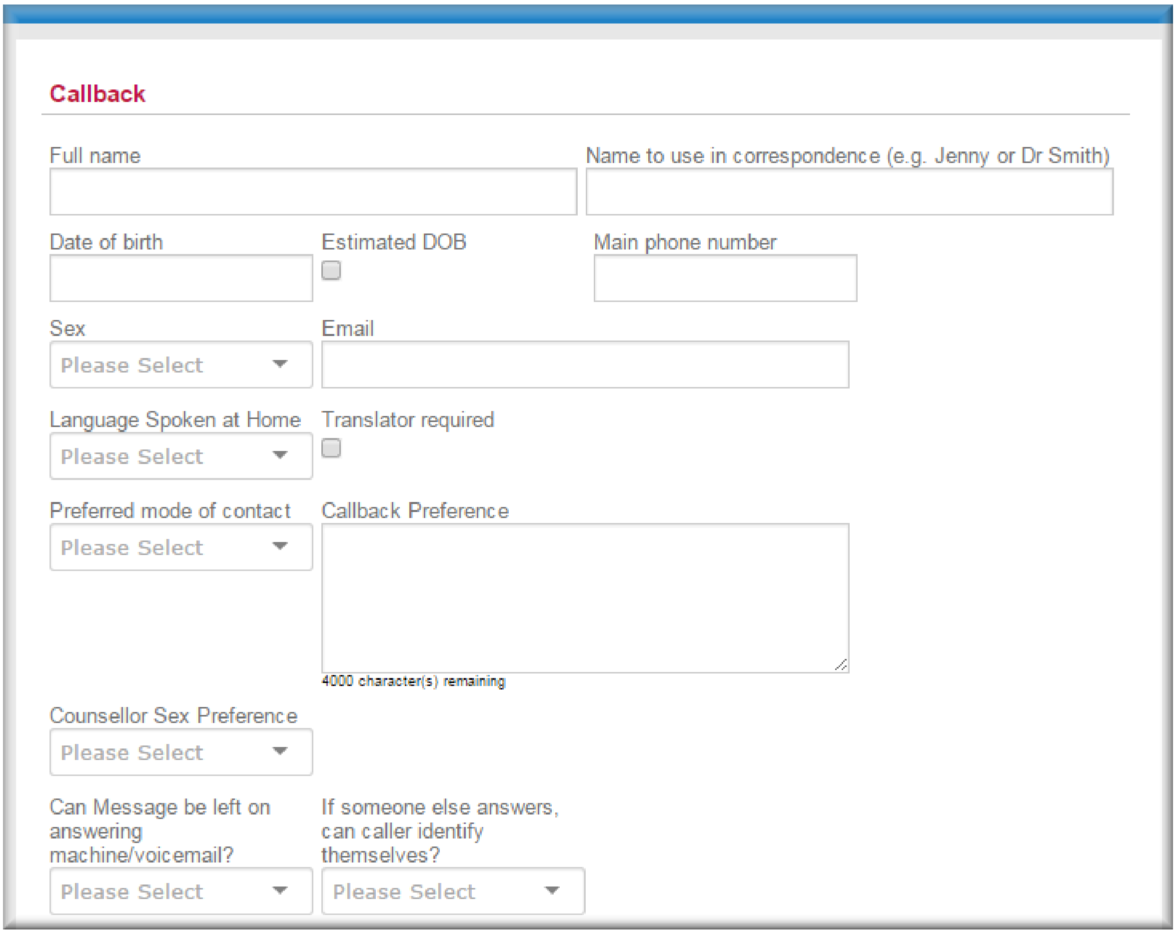



2 On the **New Case** page, in the **Clients** field, enter the client’s name and then click .

*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**.

**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 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?**

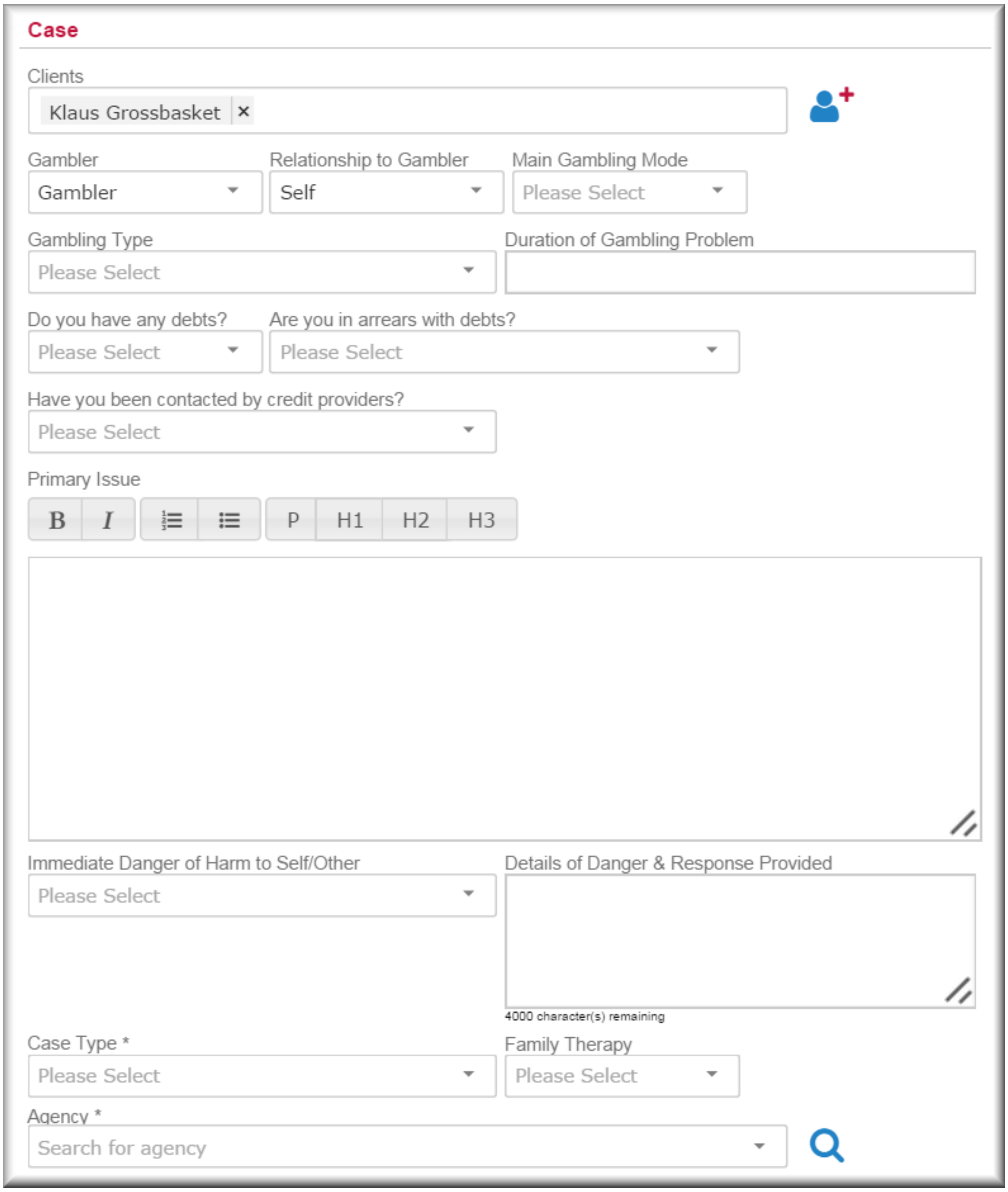
*While these are the minimum needed to set up the client record for a callback case, you can also add information in other sections of the client record if the client provides it.*

**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 the agency.

*While adding information in the **Counselling**, **External Referral** and **Issues** fields is not required for a callback case, such information as you capture here can contribute to our broader understanding of the help-seeking population as well as potentially assisting the counsellor who handles the callback.*

7 Choose an option…

| If… | Then |
|---|---|
| ...you are a telephone counsellor at the Gambler's helpline… | Go to **step 16** |
| …you are a counsellor or intake worker at a local service… | Go to **step 8**. |

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

9 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.*

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

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

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

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

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

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

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

**16** 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.*

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

**18** Click Save and Close.

*If you are an intake worker or counsellor processing the callback referral at your local service, you should record an intake and registration activity to account for your time. See Processing an unscheduled activity for a therapeutic or financial counselling case if you're not sure how to do this.*

## Anonymous cases

Both the Gambler's Helpline and the local services 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, decline to become registered clients. Some of these people might choose to become clients at a later date, 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 completed at a local service 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.

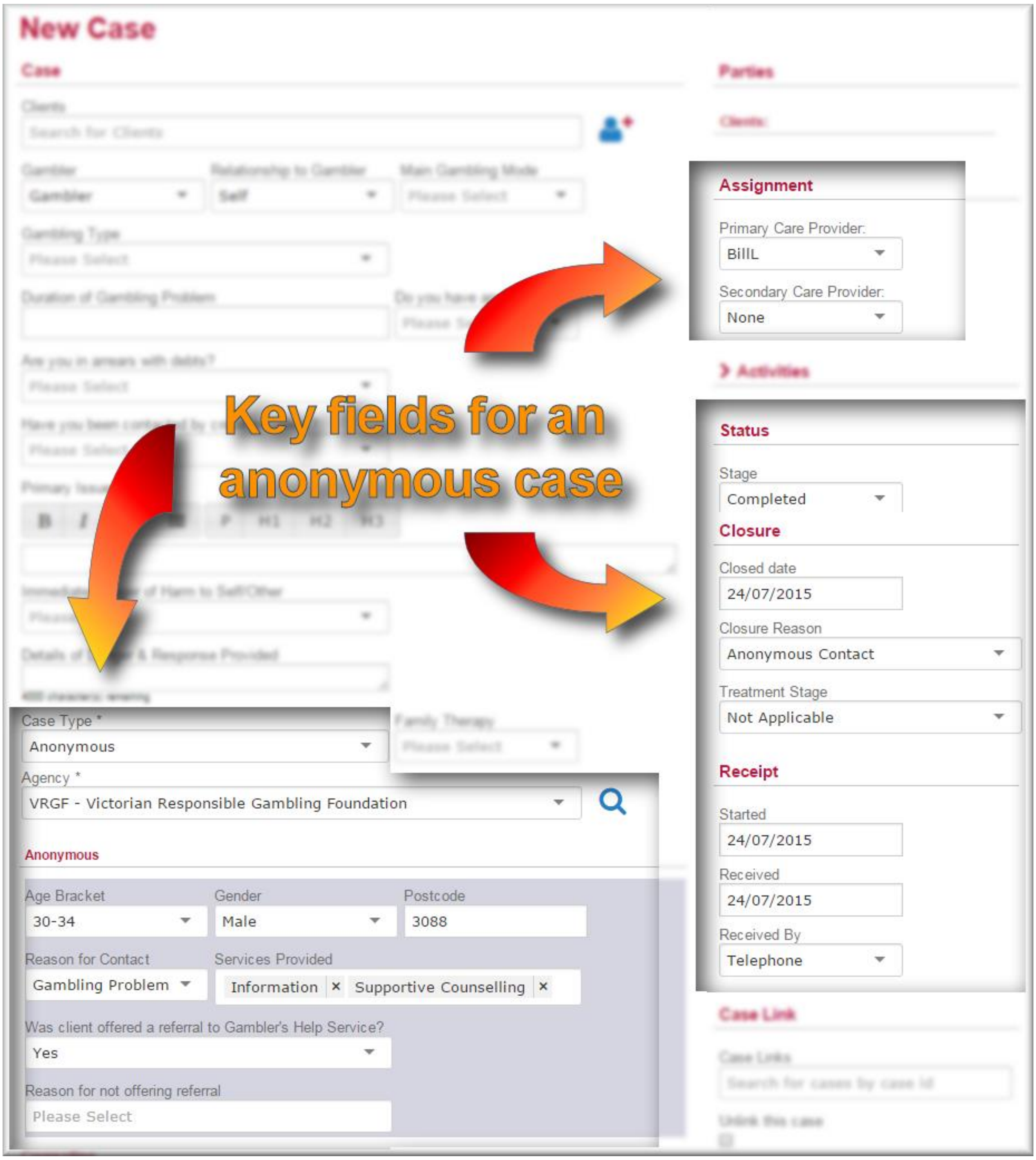
If the client volunteers more information, for example about their gambling situation or debt position, or if you also facilitate a referral for them to another service, you should also record this as well.

*The richer the data we can record about anonymous clients, the better we are able to develop our shared understanding of the help seeking population and their trajectory toward the program.*

## Creating an anonymous 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.

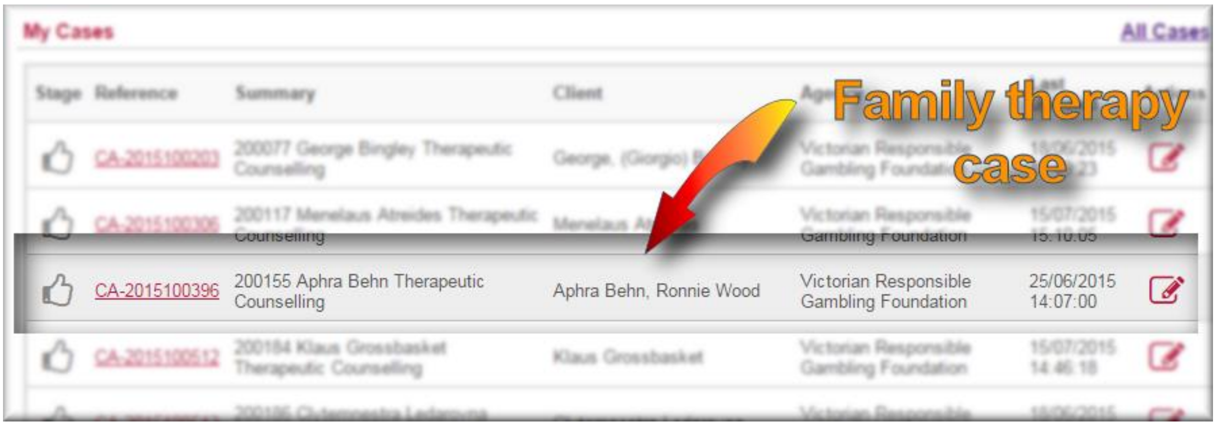
9 Click Save and Close.
*The Anonymous case displays in view mode.*

*If you are an intake worker or counsellor processing an anonymous case at your local service, you should record an anonymous activity to account for your time. See Processing an anonymous activity if you're not sure how to do this.*

# Family therapy cases

Family therapy cases have more than one *registered* client associated with them. Typically, this will be where a gambler and their partner will participate in a common case.

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




## Family therapy cases – points to consider

We rely on the data you record in *Gambler's Help Connect* to plan and resource the treatment service. Hence it is really important that we see a common approach to reporting family therapy cases. Without that shared clarity, the reliability of the data is jeopardised and our ability to plan the future development of the service is impeded.

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

- Sometimes, the gambler in this scenario has an individual case as well as the family therapy 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 *both* partners are expected to receive therapeutic benefit from their joint participation in the case? If one partner attends solely as an aid to the therapy of the other, *even though* the therapy takes place in a family sensitive context, 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 is possible that from time to time you might set up a family therapy case where *neither* partner has a current therapeutic counselling case. Should you do this, the expectation is that *both* will attend the majority of sessions where *both* will receive therapeutic benefit. If you find, your efforts are preponderantly directed towards therapy for an individual, then you should set up an individual therapeutic counselling case for them.

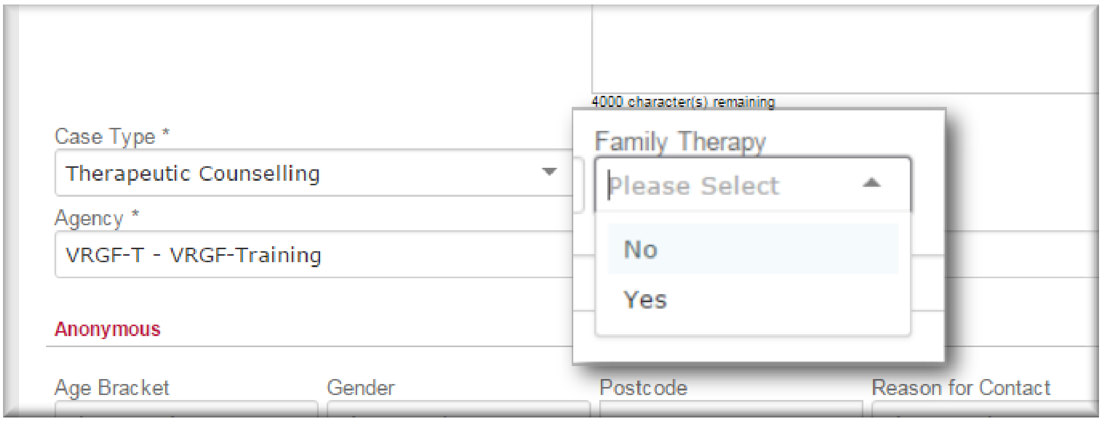
## Creating a family therapy case

Typically, when you create a family therapy case at least one of the clients will have an active case, if not, you should create a new client and case record as you would for any other new client.

1. Start by running a client search for each person you want to include in the family therapy case to check if they are not already registered.
2. Open the case of one of the parties to the family case in view mode.
3. In the **Linked Cases** section click Link a new case.
   *The **New Case** screen displays. The **Case Links** field displays the case number of the linked case.*
4. In the **Clients** field, use the field search to locate and select the name of the first client.
5. Still in the **Clients** field, enter the name of the second client.
6. 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. |

7. Complete the gambling, debt, primary issue and risk fields of the case as for the gambler (not the affected other).
8. In the **Case Type** field select **Therapeutic Counselling**.
9. In the **Family Therapy** field select **Yes**.




10. Select the agency.
11. Complete the **Counselling** fields as for the gambler.
12. Assign status, care provider and received by values.
13. Optionally, schedule an appointment in the **Activities** section.
14. 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.*

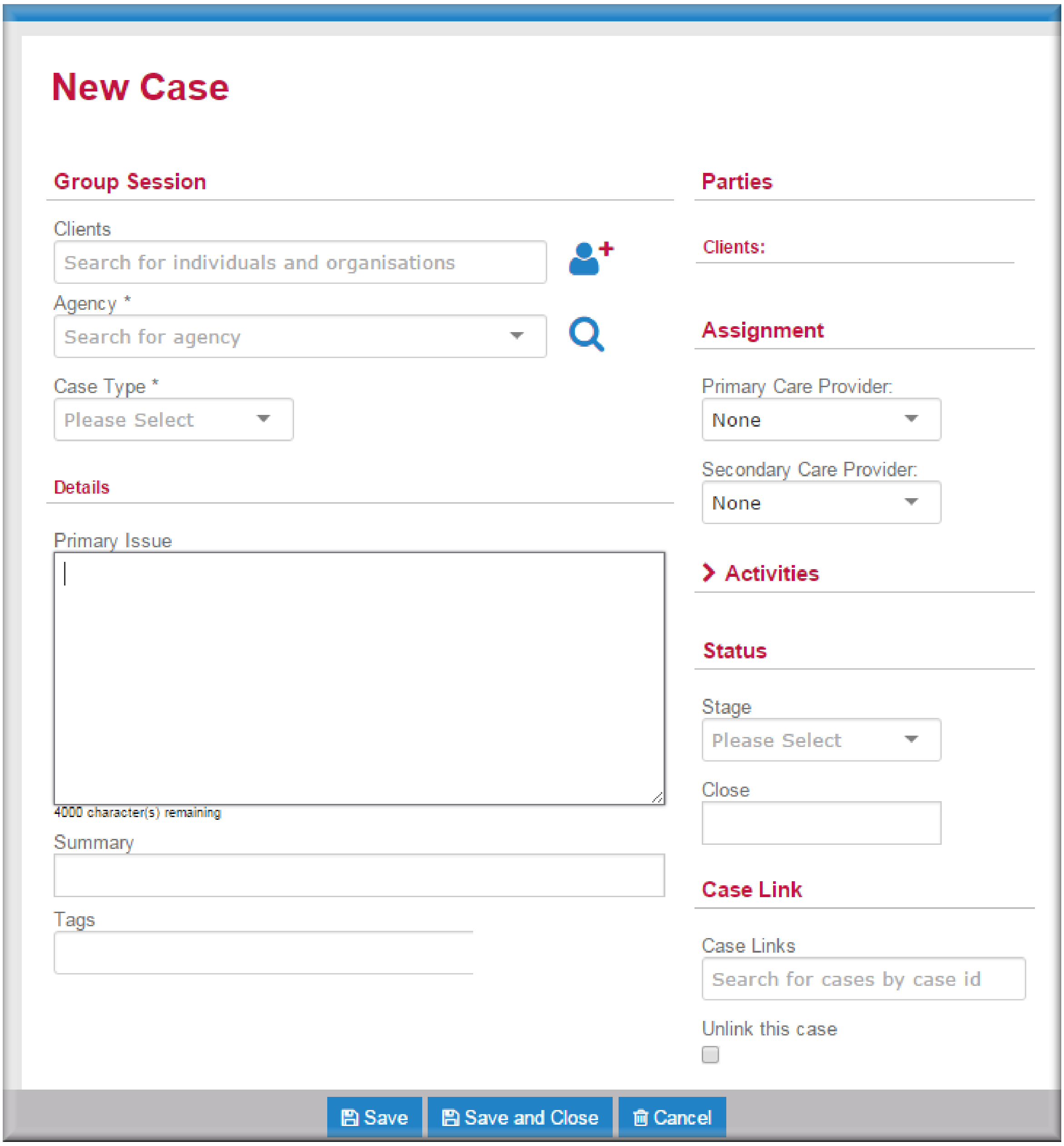
## Group cases

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 active therapeutic or financial counselling cases at the time they join a group case.

Group cases can be for either therapeutic or financial counselling although this does not preclude a therapeutic counsellor participating in a financial counselling group – or *vice versa*.

## Creating a 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 the group case type.

**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.

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

8 **IF** another counsellor 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 In the **Case Link** section, in the **Case Links** field, optionally enter and select the originating case numbers of each of the participating clients.

*Linking to the originating cases in the group case allows you to quickly access those cases should you want to add an activity or note to one of these cases after a group session. See Linking cases.*

11 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.*

## Recovery Assistance Program cases

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.*

The RAP case differs from other case types:

- You can't create a standalone RAP case, it is always linked to a specific therapeutic or financial counselling case.
- It defaults to completed status – you can't keep a RAP case open; while you can process a series of payments in a single case, you always process a *new* RAP payment in a *new* case – that is, you can't open an old case to record a new payment.
- While associated with a specific therapeutic or financial counselling case, the RAP payment history displays on the *client* record meaning that *all* RAP payments to a client in a given year can be viewed across *all* agencies irrespective of the agency where a particular payment was processed.

*RAP eligibility rules or payment thresholds are **NOT** built in to Gambler's Help Connect. You must bring your knowledge of these with you when you process RAP cases.*

RAP payment categories specify that some payments can be made by a therapeutic counsellor alone and some payments require a financial assessment by a financial counsellor. This doesn't mean that the client must have a financial counselling case to receive these payments; a financial counsellor can be a *party* to a RAP case linked to a therapeutic counselling case and conduct the financial assessment prior to approving a payment. The decision about whether the client should have a separate financial counselling case is determined by policies and the judgement of the local service.

*Click to view a video demonstration of how to create a RAP case.*

### RAP and the GST

The lump sum payments given to the agencies by the VRGF include a 10% loading to cover GST. For example, if a particular agency required RAP funding amount of $10,000 then the VRGF would provide $10,000 + $1,000 (10%) = $11,000 total.

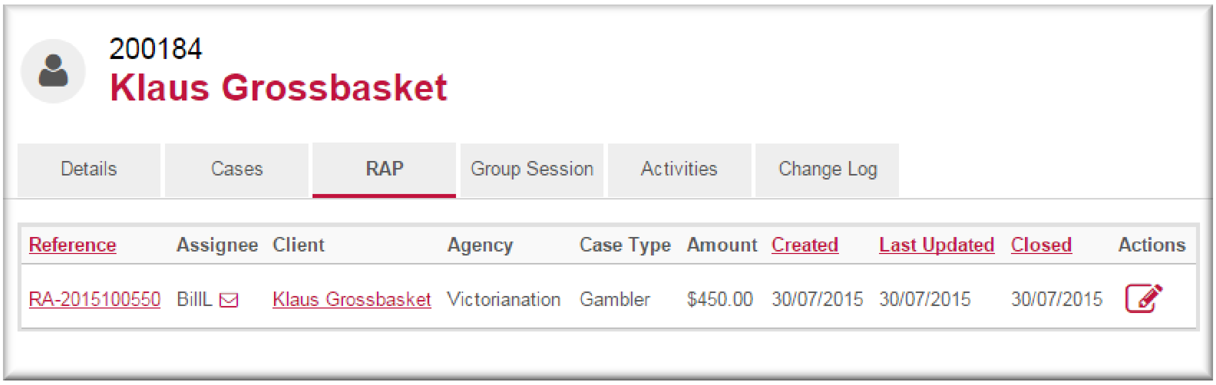
Payments made by an agency on behalf of a client, for example, the payment of a bill do not incur a GST component for the agency. The GST amount is applicable between the service provider e.g. Melbourne Water and the client, but not the agency. As far as the agency is concerned, they pay a total amount.

So if a bill had a total amount of $110.00 ($100 + $10 GST) to be paid, then the agency would make the payment of $110. This amount ($110) is the monetary value that would be reported back to the VRGF as the amount of RAP funding used. The GST amount of $10 in this scenario cannot be claimed back from the ATO by the agency, as the agency is not actually providing a service and therefore not charging GST. Agencies are responsible to fulfil their financial recording and reporting requirements, therefore the foundation cannot mandate how they treat the GST.

### Reviewing a client's RAP history

Since client's RAP eligibility is limited to a maximum of $2500 over a twelve month period, you need to check their RAP history before making a new payment.

To check a client's RAP history, open the client record and select the RAP tab. All RAP payments at all agencies for that client display.

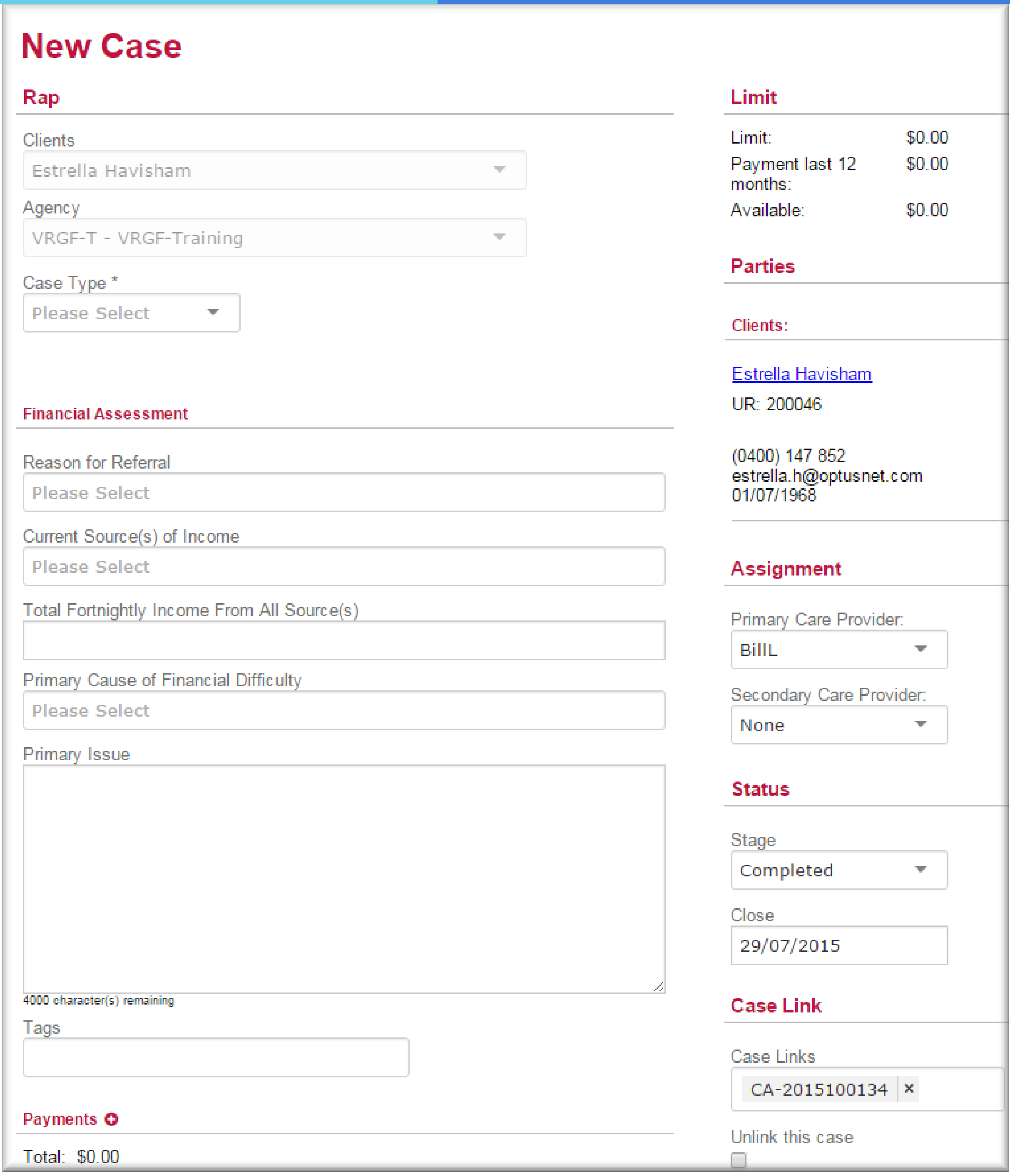



### Creating a RAP case

To create a RAP case the client must have at least one therapeutic or financial counselling case.

1 Open the case to which you want to attach the RAP case.

2 In the **Linked Cases** section click Link a new RAP.
*The **New Case** for RAP screen displays. The case stage is set to **Completed**.*
*The **Limit** section shows how much RAP funding the client has received in the last twelve months and how much funding they remain eligible for.*




3 In the **Case Type** field, select the *RAP* case type. (Gambler, Family or Affected Other).

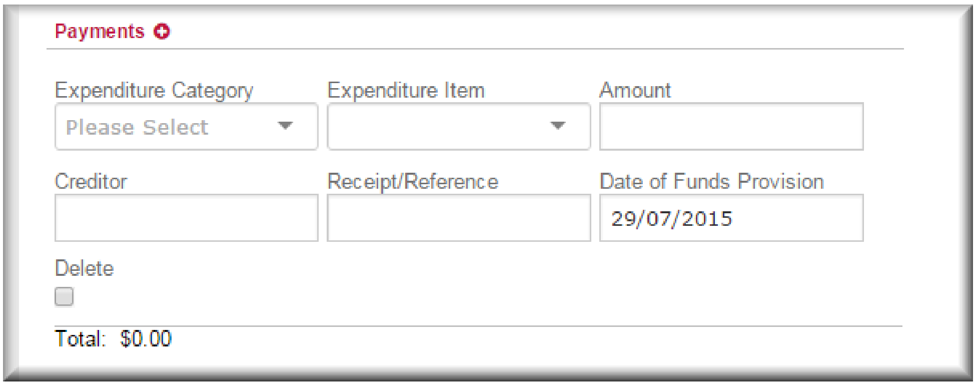
4 Choose an option:

| If… | Then |
|---|---|
| …if the Guidelines indicate this RAP case requires a financial assessment… | Go to **Step 5** |
| If the Guidelines indicate this RAP case does NOT require a financial assessment… | Go to **Step 6** |

5 In the **Financial Assessment** section:

- In the **Reason for Referral** field, select the reason or reasons for the client's referral for RAP
- In the **Current Source(s) of Income** field, select the client's present source or sources of income
- In the **Total Fortnightly Income From All Source(s)** enter the client's total income
- In the **Primary Cause of Financial Difficulty**, select the cause or causes of the client's present financial distress
- In the **Primary Issue** field, enter a summary of the issue(s) that led to this RAP referral.

6 In the **Payments** section click the add icon.
*The payments fields display.*




7 In the **Expenditure Category** field, select the category.

8 In the **Expenditure Item** field, select the item matching the category.

*The expenditure item list is derived from the expenditure category you select. There is no corresponding item for the* ***Family/Community Reconnection*** *category.*

9 In the **Amount** field, enter the payment amount for this item.

10 **IF** the RAP payment is for a bill enter the name of the payee in the **Creditor** field.

11 Select the payment date in the **Date of Funds Provision** field.

12 Click Save.
*The total payment for this RAP case displays in the* **Total** field and in the **Limit** section in the top right corner of the page.

13 Repeat **Steps 6–12** for each payment you want to authorise in this RAP case.

14 **IF** this RAP case is linked to a therapeutic counselling case, you must add the financial counsellor who conducted the financial assessment to the case. In the **Assignment** section, in the **Secondary Care Provider** field, select the financial counsellor.

15 Click Save and Close.
*The RAP payments are added to the total for the client record and the RAP case is added to the cases list for that client.*

*After completing the RAP case you need to record an activity to account for the time you (and any colleague who worked on it with you) spent on processing the RAP payment. You do this in the parent TC or FC case from which you initiated this RAP payment.*

## Linking cases

If a client has a previous case history at your agency you have the option of creating a *linked* case for them from a previous case record. The advantage of creating a linked case is that it contextualises the new case and makes it simple for you to refer to the previous cases(s) the client might have had.

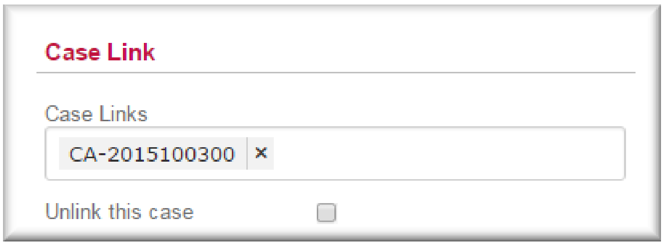
When you link two (or more cases) *Gambler's Help Connect* places a link to the case (or cases) on the case page enabling you to navigate quickly between the cases. This procedure can be helpful for helping you manage group or family therapy cases.

*This process only works for cases based at your agency.*

There are two ways you can link two cases:

- In the case page in view mode you can create a new linked case by clicking Link a new case:


- In the case page in edit mode you can enter the case number of the case you want to link to in the **Case Links** field. You can do this for multiple cases when you create a group session.




### Creating a new linked case

This procedure can be helpful when you want to link an existing individual case to a new family therapy case.

1. Open the case you want to link the new case to in view mode.
2. In the **Linked Cases** section, click Link a new case.
   *Gambler's Help Connect opens a new case page.*


3 In the **Clients** field, select the client.

4 Complete the case details as for any other therapeutic or financial counselling case.

5 Record an Intake / Registration activity to account for your time processing the referral.

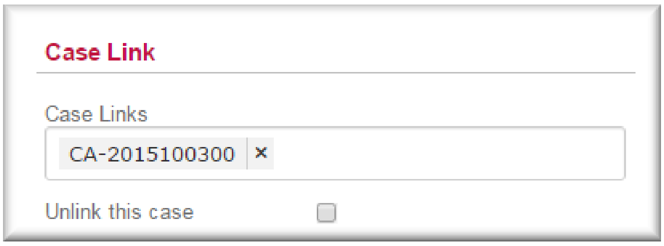
*See Processing an unscheduled activity for a therapeutic or financial counselling case if you're not sure how to do this.*

## Creating case links in an existing case

This procedure can be very helpful in providing case context in a group case. It's a good idea to make a list of the case numbers you want to link to the case before you start. When you have done this you can then access a linked case with a single mouse click.

1 Open the case you want to link other cases to, for example a group case, in edit mode.

2 In the **Case Link** field enter the case number of each case you want to link to this case.




*If you enter the last six digits of the case number,* Gambler's Help Connect *will recognise the case for you.*

3 Repeat **Step 2** until you have added all the required case numbers.

4 Click **Save and Close**.

# 4 Recording the Client Outcome Survey (COS)

The Client Outcome Survey (COS) provides important insights into the gambling behaviours and mental health of the help-seeking population.

This section describes:

- Processing a COS for a client
- Cancelling a COS 1
- Monitoring the **Pending COS** list (for telephone counsellors at the Gambler's Helpline)
- Processing a COS 2 or 3 (for telephone counsellors at the Gambler's Helpline)
- Viewing the COS record for a client.

## About the Client Outcome Survey (COS)

The Client Outcome Survey (COS) questionnaire asks a client to rate their emotional state, the impact of gambling on their life and the intensity of the gambling behaviours. The COS forms part of the client record and has three iterations:

- COS 1 – to be completed by the client with their therapeutic or financial counsellor (whoever comes first) at or as near as possible to the first appointment.
- COS 2 – a follow up three months after the completed date of the COS 1 to be completed by a telephone counsellor from the Gambler's Helpline. The COS 2 includes an evaluation section seeking the client's feedback on their experience of the Gambler's Help service.
- COS 3 – a follow up three months after the completed date of the COS 2, also to be completed by a telephone counsellor from the Gambler's Helpline.

The COS enables a standard measure of the change in a person's situation over time with respect to their gambling issues during and after their engagement with the Gambler's Help program.

When a COS 1 is completed by a therapeutic or financial counsellor, the COS 2 is automatically queued to a pending list at the Gambler's Helpline. The Gambler's Helpline monitor the list and call clients for their follow up COS 2 and COS 3.

All clients must have at least a cancelled COS 1 since otherwise their record is reported as missing minimum data set information and flagged for follow up. The table below describes the different scenarios for completing the COS.

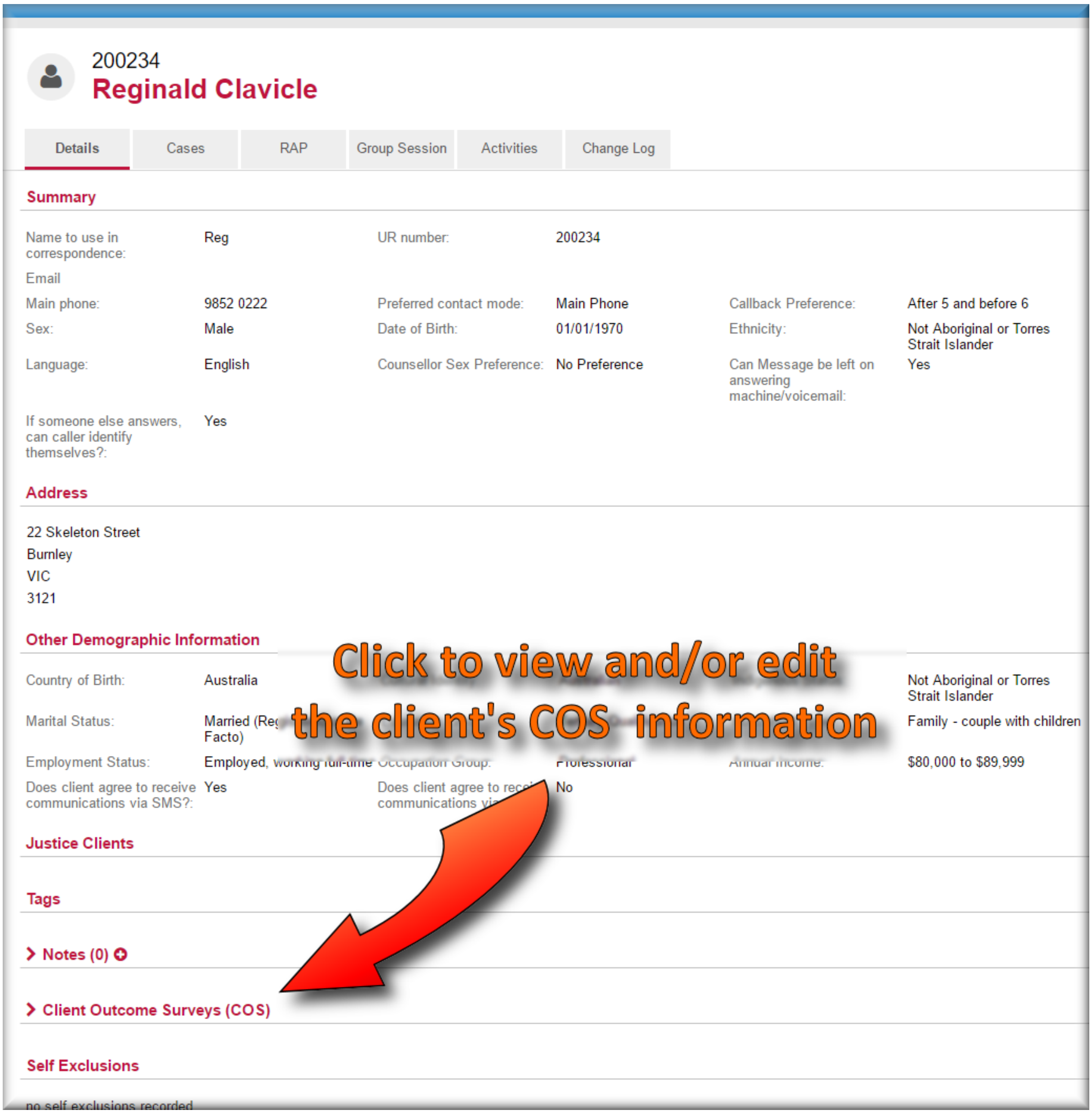
| The client… | The primary care provider… |
|---|---|
| …agrees to completing the COS 1-3 | …completes a COS 1.<br>*The system queues the subsequent COS 2 and 3 to the Gambler's Helpline.* |
| …agrees to completing the COS 1 but doesn't want follow up for the COS 2 and 3 | …completes the COS 1 and cancels the COS 2.<br>*The system does not queue the follow up.* |
| …doesn't agree to completing the COS | …cancels the COS 1. |

| | |
|---|---|
| | *The system does not queue the follow up.* |

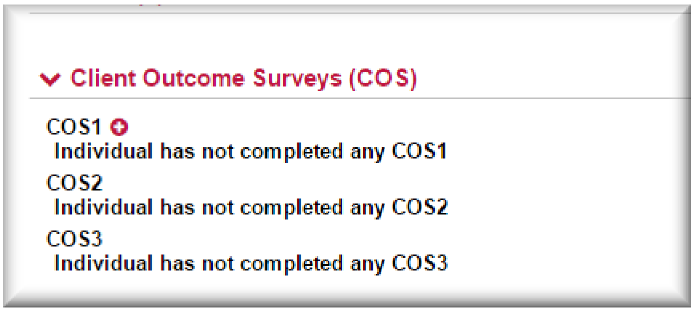
If a client represents for service *less than* twelve months after the date of a COS 3 then a new COS is not required. If the client represents *more than* twelve months after their COS 3 then you should treat it as a new presentation and invite them to complete a new COS 1.

## Processing a COS1

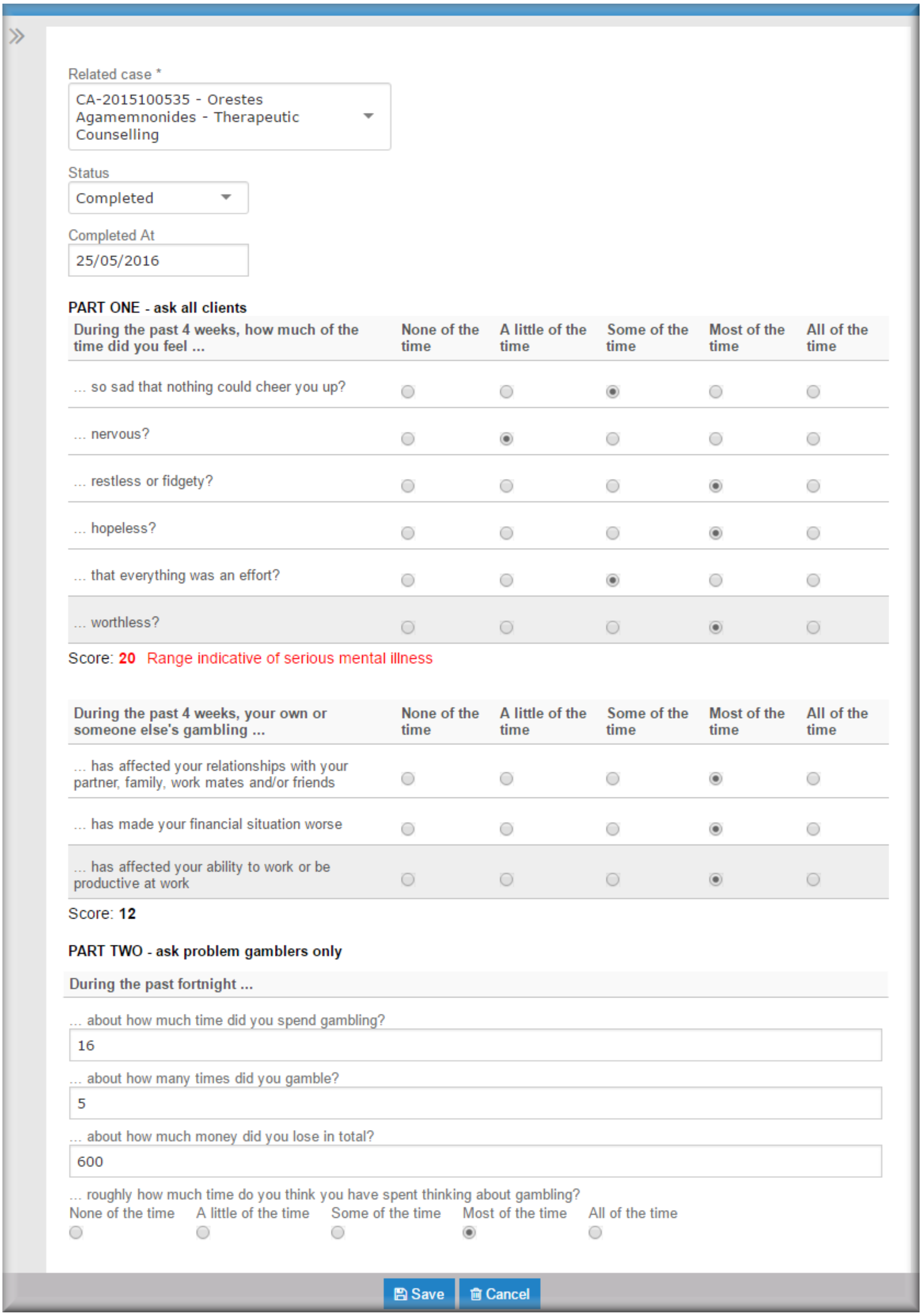
The COS 1 is expected to be completed as close as is practicable to the first appointment with the client. This can be for either a therapeutic or financial counselling case. You access the COS from the **Client Outcome Surveys (COS)** section on the **Details** tab of the client record in view mode.




1 Open the client record in view mode and expand the **Client Outcome Surveys (COS)** section.




**2** Click the ⊕ next to the COS 1.
*The Client Outcome Survey form displays with all fields blank except the* **Status** *field which displays a status of* **Scheduled**.



Related case *

CA-2015100535 - Orestes Agamemnonides - Therapeutic Counselling

Status

Completed

Completed At

25/05/2016

**PART ONE - ask all clients**

| During the past 4 weeks, how much of the time did you feel ... | None of the time | A little of the time | Some of the time | Most of the time | All of the time |
|---|---|---|---|---|---|
| ... so sad that nothing could cheer you up? | ○ | ○ | ● | ○ | ○ |
| ... nervous? | ○ | ● | ○ | ○ | ○ |
| ... restless or fidgety? | ○ | ○ | ○ | ● | ○ |
| ... hopeless? | ○ | ○ | ○ | ● | ○ |
| ... that everything was an effort? | ○ | ○ | ● | ○ | ○ |
| ... worthless? | ○ | ○ | ○ | ● | ○ |

Score: **20** Range indicative of serious mental illness

| During the past 4 weeks, your own or someone else's gambling ... | None of the time | A little of the time | Some of the time | Most of the time | All of the time |
|---|---|---|---|---|---|
| ... has affected your relationships with your partner, family, work mates and/or friends | ○ | ○ | ○ | ● | ○ |
| ... has made your financial situation worse | ○ | ○ | ○ | ● | ○ |
| ... has affected your ability to work or be productive at work | ○ | ○ | ○ | ● | ○ |

Score: **12**

**PART TWO - ask problem gamblers only**

**During the past fortnight ...**

... about how much time did you spend gambling?

16

... about how many times did you gamble?

5

... about how much money did you lose in total?

600

... roughly how much time do you think you have spent thinking about gambling?

| None of the time | A little of the time | Some of the time | Most of the time | All of the time |
|---|---|---|---|---|
| ○ | ○ | ○ | ● | ○ |

Save Cancel

**3** In the **Related Case** field select the case associated with this COS 1.

**4** Using the radio buttons and text fields, enter the client's responses to the questions.

*As you enter the client's answers to the questions in Part 1 of the COS a total score displays below each section.*

**5** When you have entered all the client's answers to the questions, scroll back up to the top of the page to the **Status** field select **Completed**.

**6** In the **Completed At** field, select the date when the client completed the COS (not the date you entered it in the system).

**7** Scroll to the bottom of the page and then click Save.
*The COS is saved and a COS 2 is queued to the Gambler's Helpline for a follow up three months from the save date.*

### Cancelling a COS 1

There might be occasions when clients refuse consent for the COS or disengage from the service before you can collect the information. If this happens you cancel the COS 1. When you cancel the COS 1 this cancels the COS 2 and 3 also.

1. Open the client record in view mode.
2. Expand the **Client Outcome Surveys (COS)** section and click the next to the COS1.
   *The Client Outcome Survey form displays.*
3. In the **Status** field, select **Cancelled**.
   *The* ***Reason for cancellation*** *field displays.*
4. In the **Reason for cancellation** field select the reason.
5. In the **Completed at** field, select today's date.
6. Scroll to the bottom of the page and then click Save.

*If the client agreed to complete COS 1 but doesn't want a follow-up from the Gambler's Helpline you carry out the same steps as above except you open and cancel the COS 2.*

## Collecting the COS 2 and 3

COS 2 and 3 information is collected by the Gambler's Helpline. This information provides a standard measure of the effectiveness of the program in meeting clients' needs. The COS 2 and 3 surveys are identical to the COS 1 except that the COS 2 also has a section querying a client's experience of accessing the Gambler's Help service.

### Reviewing a COS record for a client

You can review a client's COS record across all incidences from the client record. This shows the dates, case types, agencies and aggregate scores. You do this in the **Client Outcome Surveys (COS)** section of the client record in view mode.

## Monitoring the Pending COS list

A COS 2 is queued to the **Pending COS** list when a therapeutic or financial counsellor completes a COS 1 by marking its status as **Complete**. This menu item is only visible to *Gambler's Help Connect* users from the Gambler's Helpline. You use this list to monitor the COS 2 and 3 queue and follow up with clients.

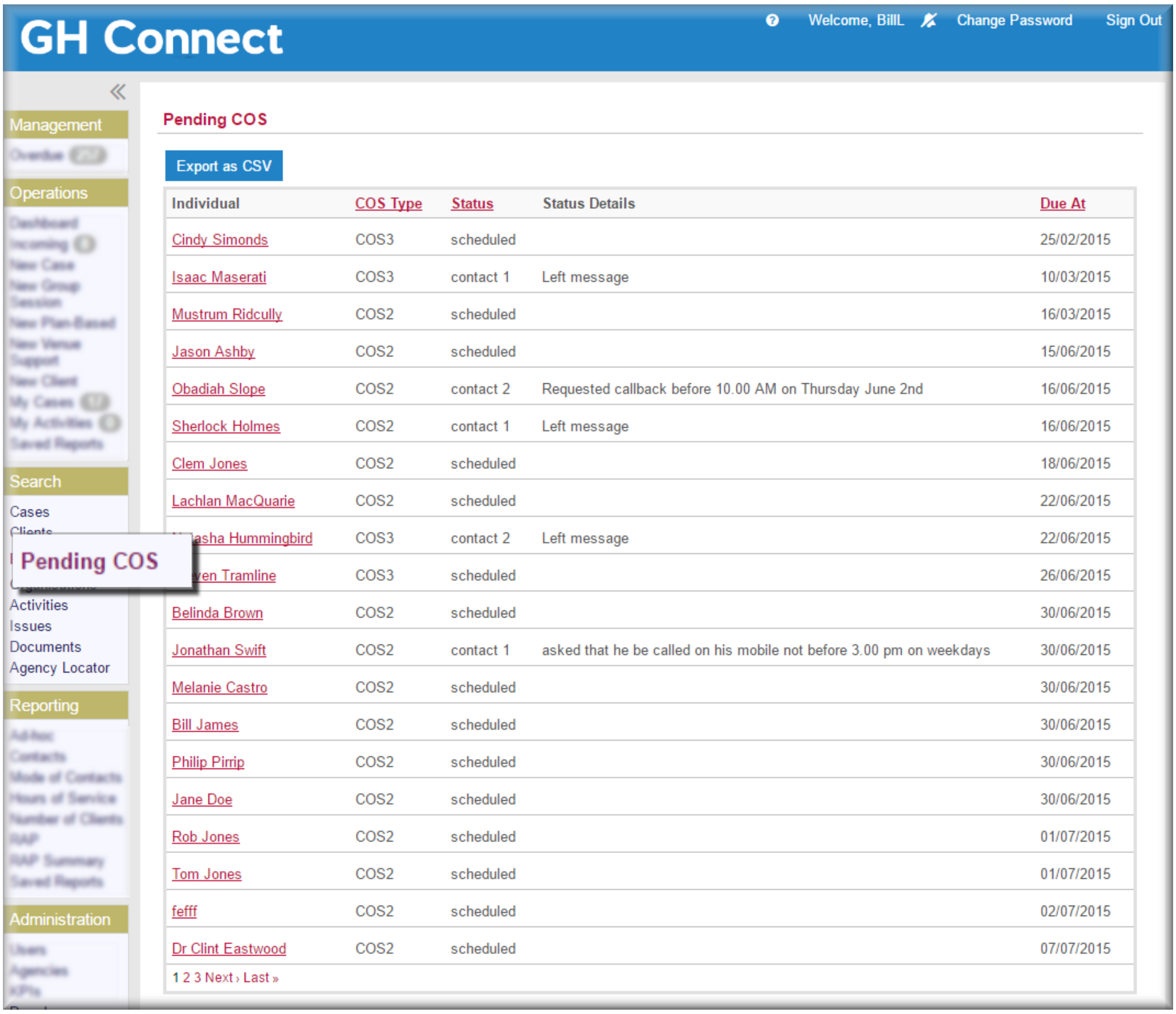
You access the **Pending COS** list in the **Search** menu. It displays:

- A Client Name link that provides access to the COS for that client.
- COS type: indicates whether a COS 2 or 3 is due.
- Status:
  - **Scheduled** – no follow up has been attempted
  - **Contact 1** – one unsuccessful attempt to obtain the survey information

- **Contact 2** – two unsuccessful attempts to obtain the survey information
- **Contact 3** – three unsuccessful attempts to obtain the survey information
- **Completed** – the client provided the required COS information
- **Cancelled** – the client withdrew consent or was unavailable.

- Status details: where the status of a COS is **Contact**, the status details show why the call was unsuccessful. You select a reason from a list of values.
- Due at: the date when you are expected to start following a client up for a COS.

When a telephone counsellor completes a COS 2, it displays on the **Pending COS** list as a scheduled COS 3. When you *cancel* a COS or *complete* a COS 3 it no longer displays on the **Pending COS** list.




| Individual | COS Type | Status | Status Details | Due At |
|---|---|---|---|---|
| Cindy Simonds | COS3 | scheduled | | 25/02/2015 |
| Isaac Maserati | COS3 | contact 1 | Left message | 10/03/2015 |
| Mustrum Ridcully | COS2 | scheduled | | 16/03/2015 |
| Jason Ashby | COS2 | scheduled | | 15/06/2015 |
| Obadiah Slope | COS2 | contact 2 | Requested callback before 10.00 AM on Thursday June 2nd | 16/06/2015 |
| Sherlock Holmes | COS2 | contact 1 | Left message | 16/06/2015 |
| Clem Jones | COS2 | scheduled | | 18/06/2015 |
| Lachlan MacQuarie | COS2 | scheduled | | 22/06/2015 |
| ...asha Hummingbird | COS3 | contact 2 | Left message | 22/06/2015 |
| ...en Tramline | COS3 | scheduled | | 26/06/2015 |
| Belinda Brown | COS2 | scheduled | | 30/06/2015 |
| Jonathan Swift | COS2 | contact 1 | asked that he be called on his mobile not before 3.00 pm on weekdays | 30/06/2015 |
| Melanie Castro | COS2 | scheduled | | 30/06/2015 |
| Bill James | COS2 | scheduled | | 30/06/2015 |
| Philip Pirrip | COS2 | scheduled | | 30/06/2015 |
| Jane Doe | COS2 | scheduled | | 30/06/2015 |
| Rob Jones | COS2 | scheduled | | 01/07/2015 |
| Tom Jones | COS2 | scheduled | | 01/07/2015 |
| fefff | COS2 | scheduled | | 02/07/2015 |
| Dr Clint Eastwood | COS2 | scheduled | | 07/07/2015 |

## Processing a COS2 or 3

*When you process a COS 2 or 3 the final question is whether the client wants to be contacted by a Gambler's Help service for more assistance. If the answer is Yes, you keep the client on the line after completing the COS to record a new referral for them.*

The start point for processing a COS 2 or 3 is the **Pending COS** list:

1 From the **Operations** menu select **Pending COS**.
*The Pending COS list displays.*

2 Click the Name link for the client you want to follow up for a COS.
*The client record opens in view mode.*

3 Expand the **Client Outcome Surveys (COS)** section and click the next to the COS2 or 3.
*The Client Outcome Survey form COS2 or 3 displays.* Use the radio buttons and text fields to enter the client's responses to the questions.

4 Scroll to the top of the form and in the **Status** field, select **Completed**.

5 In the **Completed At** field, enter the date.

6 Scroll back to the bottom of the form and then click Save.
*If you completed a COS 2 a COS 3 is queued to the Gambler's Helpline for a follow up three months from the completed date.*

Related case
CA-2015100080 - Mustrum Ridcully - Financial Counselling

Status
Scheduled

Completed At
dd/mm/yyyy

**PART ONE - ask all clients**

| During the past 4 weeks, how much of the time did you feel ... | None of the time | A little of the time | Some of the time | Most of the time | All of the time |
|---|---|---|---|---|---|
| ... so sad that nothing could cheer you up? | ○ | ● | ○ | ○ | ○ |
| ... nervous? | ● | ○ | ○ | ○ | ○ |
| ... restless or fidgety? | ○ | ● | ○ | ○ | ○ |
| ... hopeless? | ● | ○ | ○ | ○ | ○ |
| ... that everything was an effort? | ○ | ● | ○ | ○ | ○ |
| ... worthless? | ○ | ● | ○ | ○ | ○ |

Score: **10** Sub-clinical range

| During the past 4 weeks, your own or someone else's gambling ... | None of the time | A little of the time | Some of the time | Most of the time | All of the time |
|---|---|---|---|---|---|
| ... has affected your relationships with your partner, family, work mates and/or friends | ● | ○ | ○ | ○ | ○ |
| ... has made your financial situation worse | ○ | ● | ○ | ○ | ○ |
| ... has affected your ability to work or be productive at work | ● | ○ | ○ | ○ | ○ |

Score: **4**

**PART TWO - ask problem gamblers only**

**During the past fortnight ...**

... about how much time did you spend gambling?
2

... about how many times did you gamble?
1

... about how much money did you lose in total?
100

... roughly how much time do you think you have spent thinking about gambling?

| None of the time | A little of the time | Some of the time | Most of the time | All of the time |
|---|---|---|---|---|
| ○ | ● | ○ | ○ | ○ |

**PART THREE - ask all clients**

This section is in COS2 only

| The Gambler's Help service | Yes | No | Don't know | No answer |
|---|---|---|---|---|
| ... saw me quickly | ● | ○ | ○ | ○ |
| ... was easy to get to | | | | ○ |
| ... was open when I needed it to be | ● | ○ | ○ | ○ |
| ... saw me as often as I needed | ● | ○ | ○ | ○ |
| ... told me about other Gambler's Help services I could use | ● | ○ | ○ | ○ |
| Overall were you satisfied with the service you received from Gambler's Help? | ● | ○ | ○ | ○ |
| Would you recommend the Gambler's Help service to a friend or family member? | ○ | ○ | ● | ○ |

Do you wish to be contacted again by a Gambler's Help counsellor to receive more assistance?
No

This section is in COS2 AND 3

Save Cancel

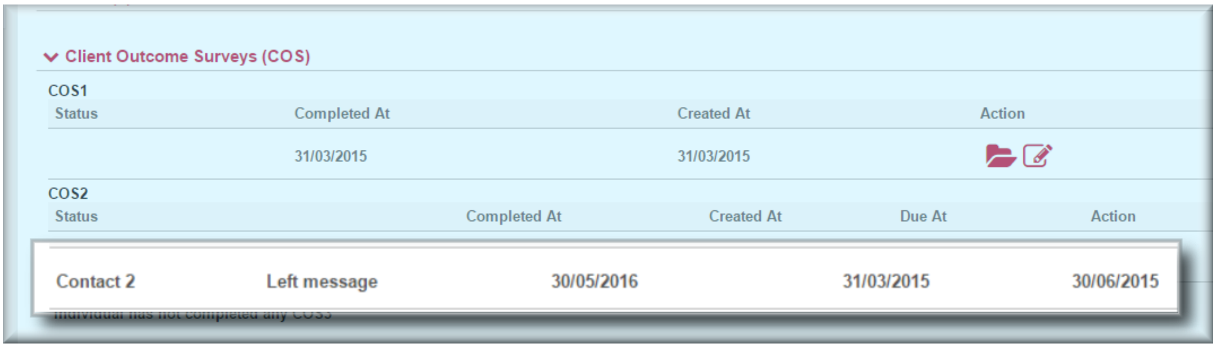
## Recording unsuccessful COS calls

There might be times when you are following up a COS 2 or 3 with a client that you can't get a response on your first attempt. The client might be busy and ask you to call back later, the phone might ring out without an answer or go to voicemail. In these situations you are expected to make three attempts at contact before cancelling.

In other situations it will be obviously fruitless to attempt further follow up. The client might withdraw consent, the phone number might be disconnected or wrong.

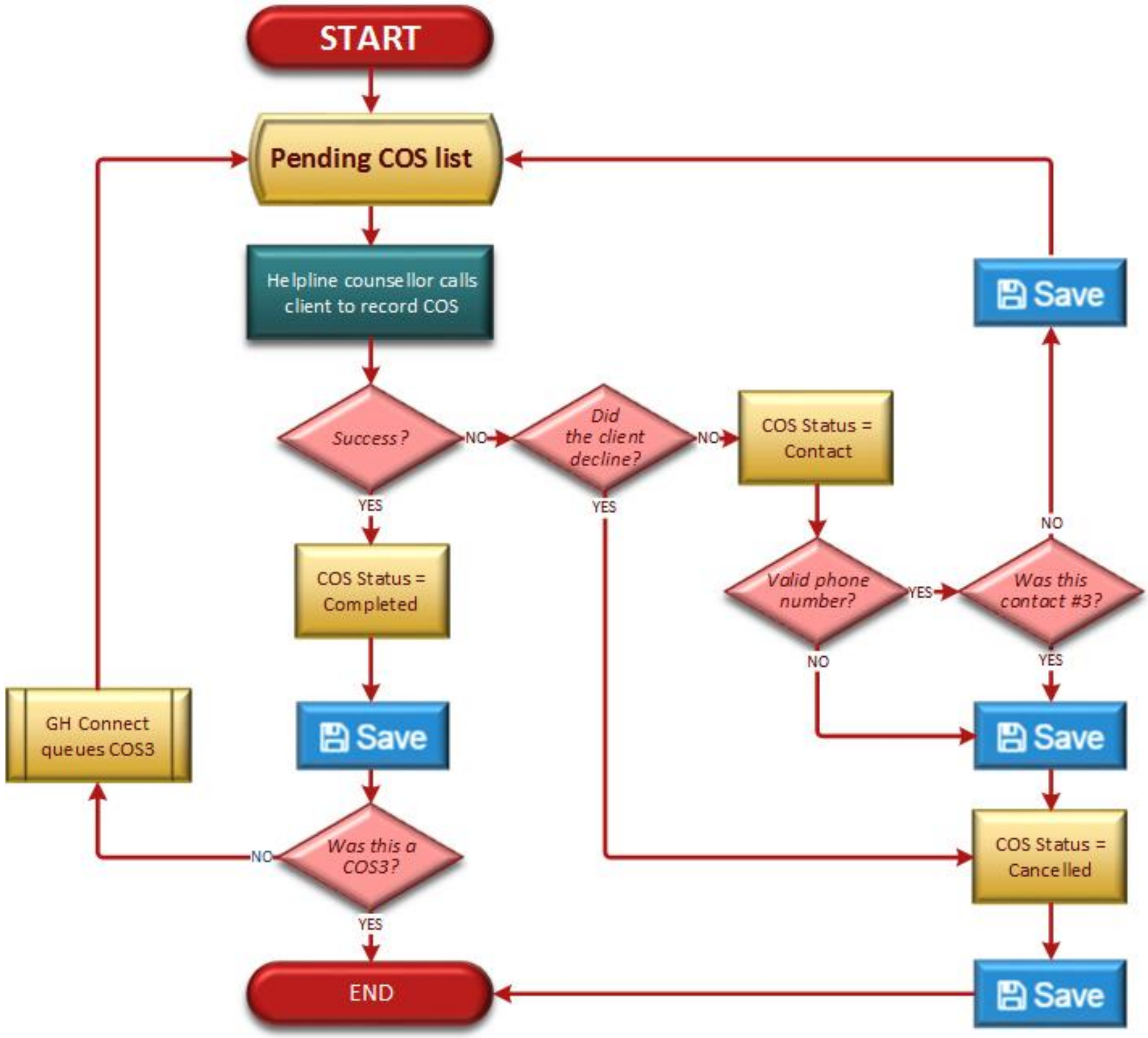
You manage these scenarios using the **Status** field in the COS screen to record the reason why you were unable to record a COS 2 or 3 on this occasion. When this happens you save the uncompleted COS record with the status of *contact*. By doing this you show you've followed up on the COS and the reason why it was unsuccessful on this occasion. When a COS has the status of **Contact** it remains on the **Pending COS** list, when you cancel, it is removed from the list.

The illustration below shows an example of an attempted COS 2.




### Process overview

The diagram below gives an overview of the process.




### If the client doesn't answer or you leave a message…

1 In the **Status** field select **Contact**

2 In the **Contact outcome** the relevant value

3 Click Save.

### If the client answers and asks you to call back later…

1 In the **Status** field select **Contact**

2 In the **Contact outcome** select the relevant value

3 In the **Other contact outcome** free text field, summarise the callback request

4 Click Save.

### If the phone number is disconnected or wrong

1. In the **Status** field select **Contact**
2. In the **Contact outcome** the relevant value
3. Click Save
4. Re-open the COS
5. In the **Status** field select **Cancelled**
6. In the **Reason for cancellation** field select **Unable to be contacted**
7. Click Save.

### If the client doesn't want to participate

1. In the **Status** field select **Cancelled**
2. In the **Reason for cancellation** field select **Declined to participate**
3. Click Save.

# 5 Recording activities for client cases

In local services, therapeutic counsellors, financial counsellors, venue support workers and community educators all record *activities* in *Gambler's Help Connect*.

*Telephone counsellors at the Gambler's Helpline do NOT record activities – their efforts are accounted using different metrics.*

You document the work you have done for your clients and the time it took in *activity* records. Activities can range from simple to complex and can involve multiple clients or counsellors.

Your activity records form the basis of your clinical or financial counselling notes, while the time you record against activities is aggregated to your agency hours of service reporting.

Learning to quickly and reliably record your activity data is an important element in your mastery of *Gambler's Help Connect*.

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.

## 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 place a higher value on direct time over indirect time – they both constitute equally valued hours of service. The reason for the distinction is to enable a better understanding of the* client experience *of the Gambler's Help service and a clear appreciation of the work done 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.<br><br>These activities *will always* include a component of direct and indirect time. | ○ Assertive engagement<br>○ Assessment<br>○ Callback<br>○ Counselling: Financial<br>○ Counselling: Therapeutic<br>○ Provision of RAP<br>○ Registration (INI & Intake)<br>○ Secondary Consultation (when a client is present)<br>○ Self Exclusion Deed Signing<br>○ Self Exclusion Revocation<br>○ Self Exclusion Support |
| **Case activities** record work done without the client present.<br><br>These activities should *only record indirect time*. | ○ Case Closure<br>○ Case Conference/Review<br>○ Case Summary<br>○ Referral<br>○ Secondary Consultation (when a client is not present)<br>○ Advocacy<br>○ Unsuccessful Phone call<br>○ Administrative. |
| **Anonymous activities** record work done on anonymous cases.<br><br>These activities should *never* include direct time. | ○ Anonymous Therapeutic<br>○ Anonymous Financial. |
| **Group session** activities:<br>○ Session<br>○ Preparation<br>○ Administrative | *Note: Group session activity types don't have sub-types.* |

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

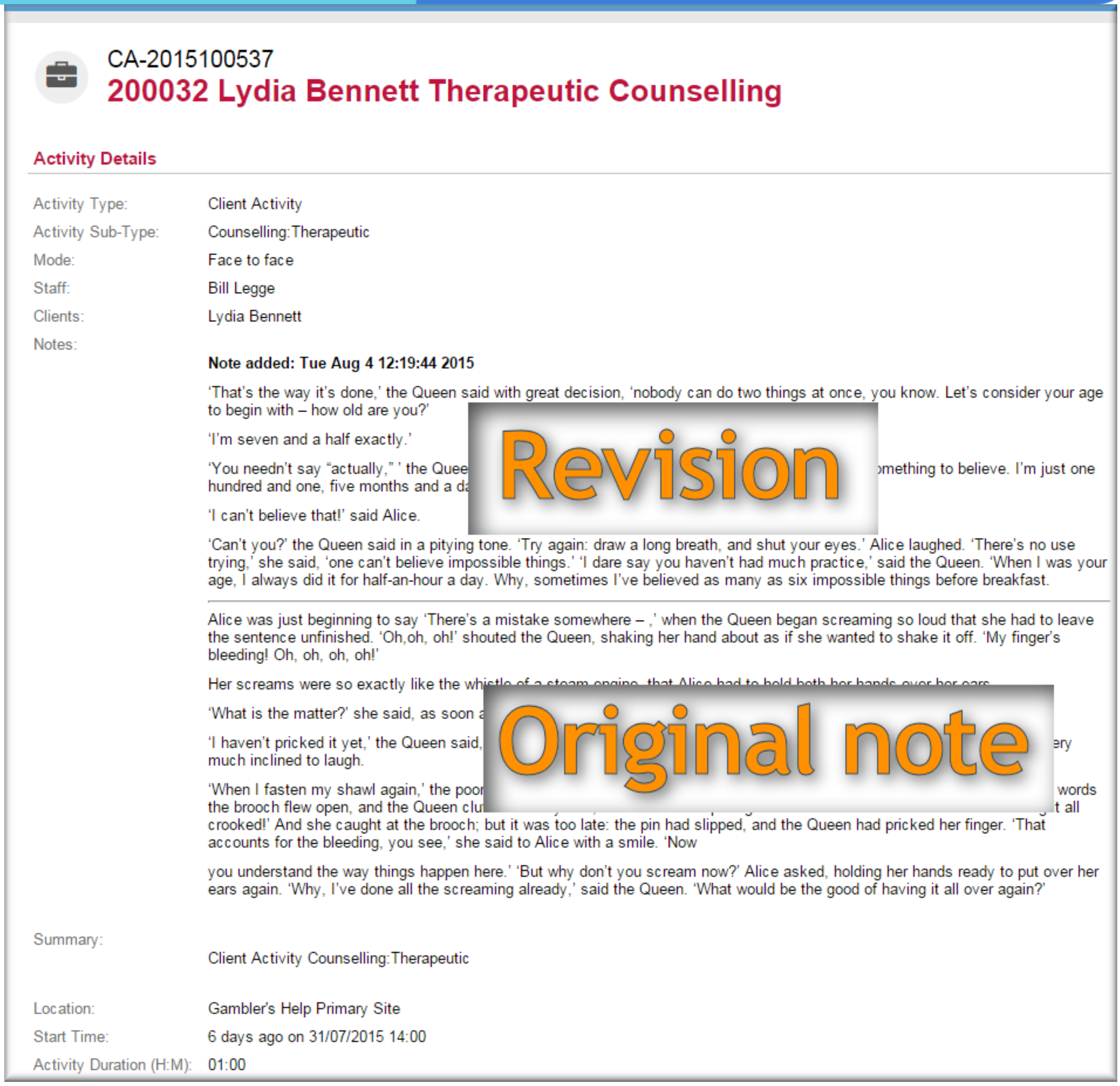
All activities include a timesheet where you record your direct, indirect and travel time. This displays when you mark an activity as completed.

## Activity notes

*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 thus entered. 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… …mething 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 whi…

'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 therapeutic or financial counselling 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.

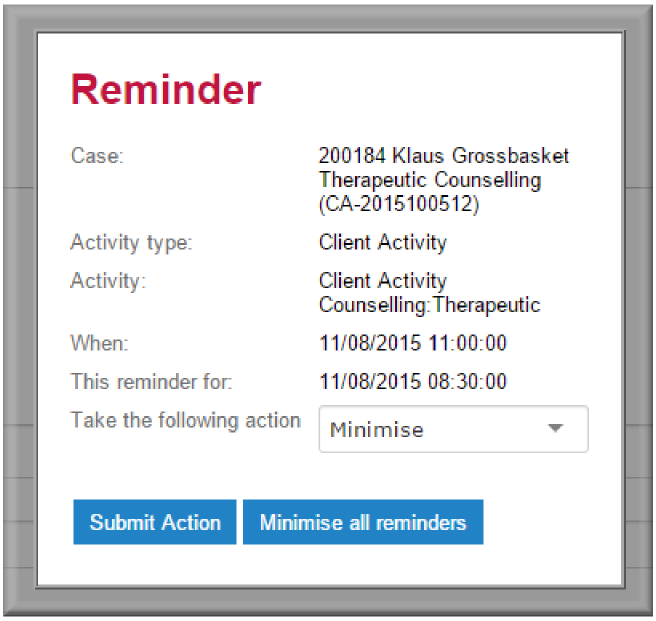
Some activities don't require scheduling in *Gambler's Help Connect*. For example, case type activities where the client is not present don't need to be booked in *Gambler's Help Connect* – unless you want to block out the time. With *ad hoc* activities, such as an unplanned call from a client, scheduling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

For anonymous cases you always simply 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.*

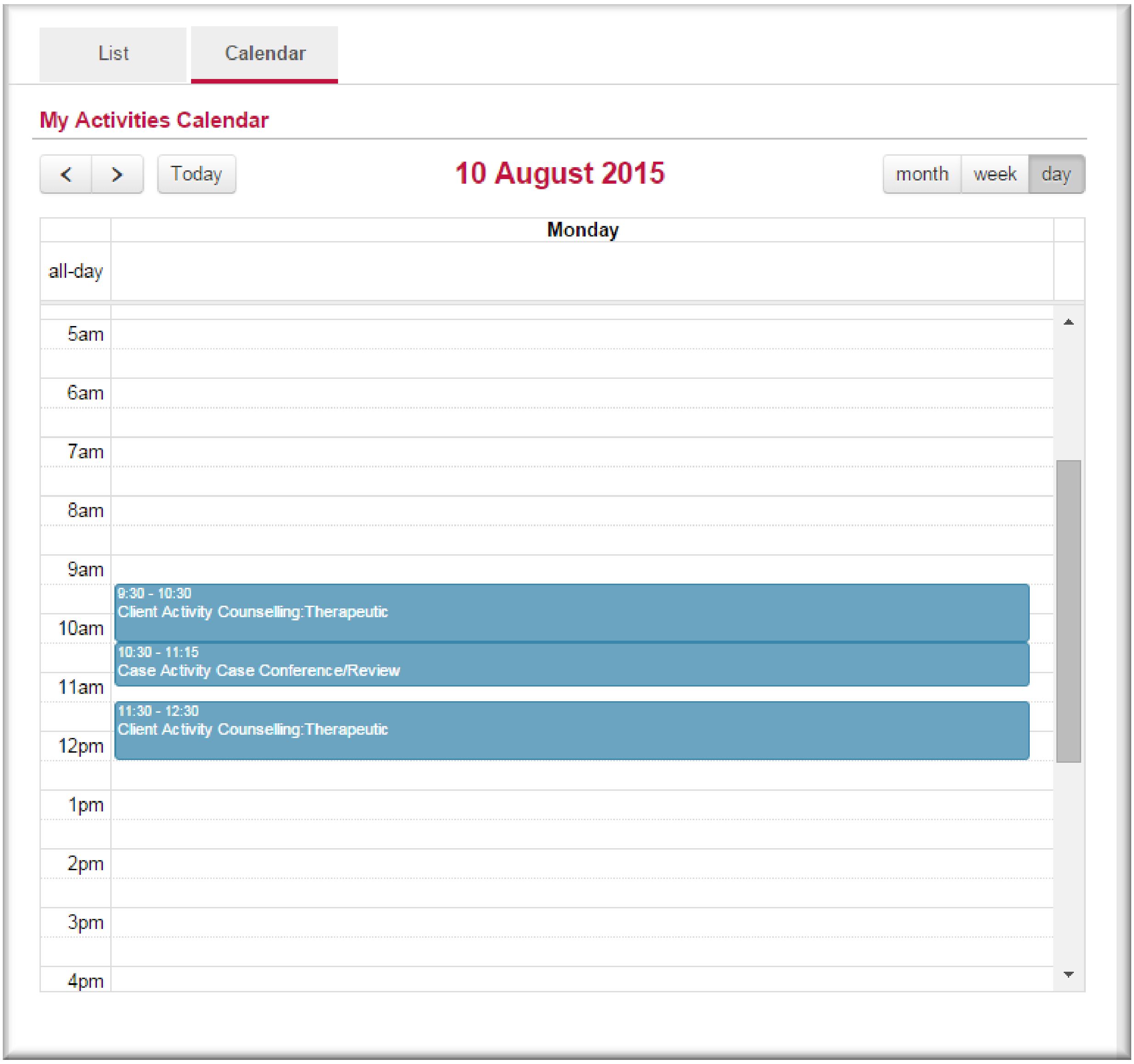
### Activity documents

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 that 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 specify a duration. This is the time that is blocked out in your calendar. When you process the activity, the duration value is automatically transferred 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 a single procedure.

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 no need to schedule – you can complete the activity in a single procedure.

There are also slight differences in how you process activities for therapeutic or financial counselling 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 therapeutic or financial counselling case

To create a new activity record:

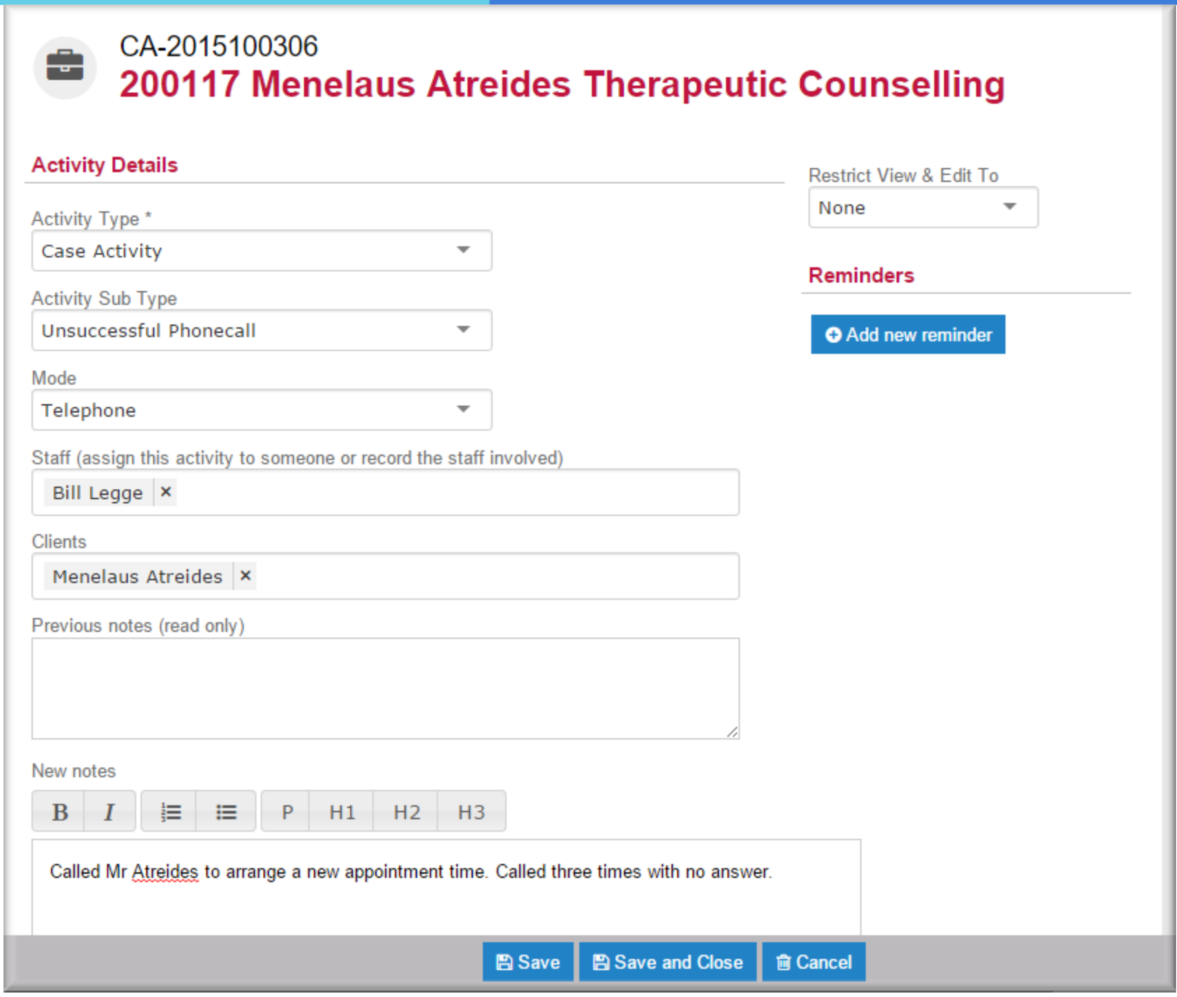
- Click next to the **Activities** section on the **Details** tab of the case
  **OR**
- Click New Activity in the **Activities** tab of the case record.

While providing slightly different views of the activity record for the case, either of the above methods yield the same result. It is largely a matter of personal preference which you choose to use.

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

2 Using either of the methods above, open a new activity page.

*The illustration of this screen is presented in sections for better viewing.*




**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 activity types and sub types table for a list of the activity sub types.*

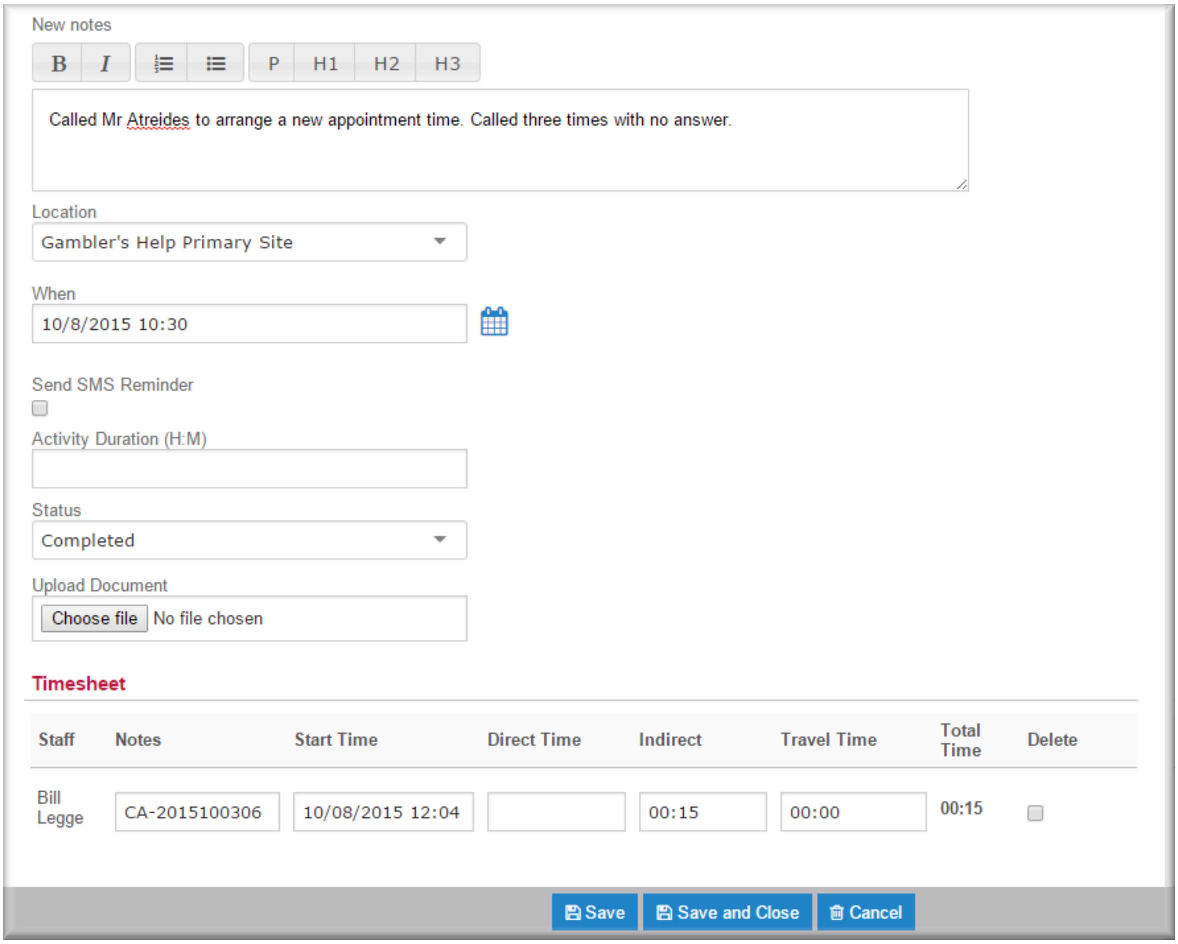
**5** In the **Mode** field, select the contact mode:

- **Face to face**
- **Telephone**
- **Online**
- **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 therapeutic or financial counselling case

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

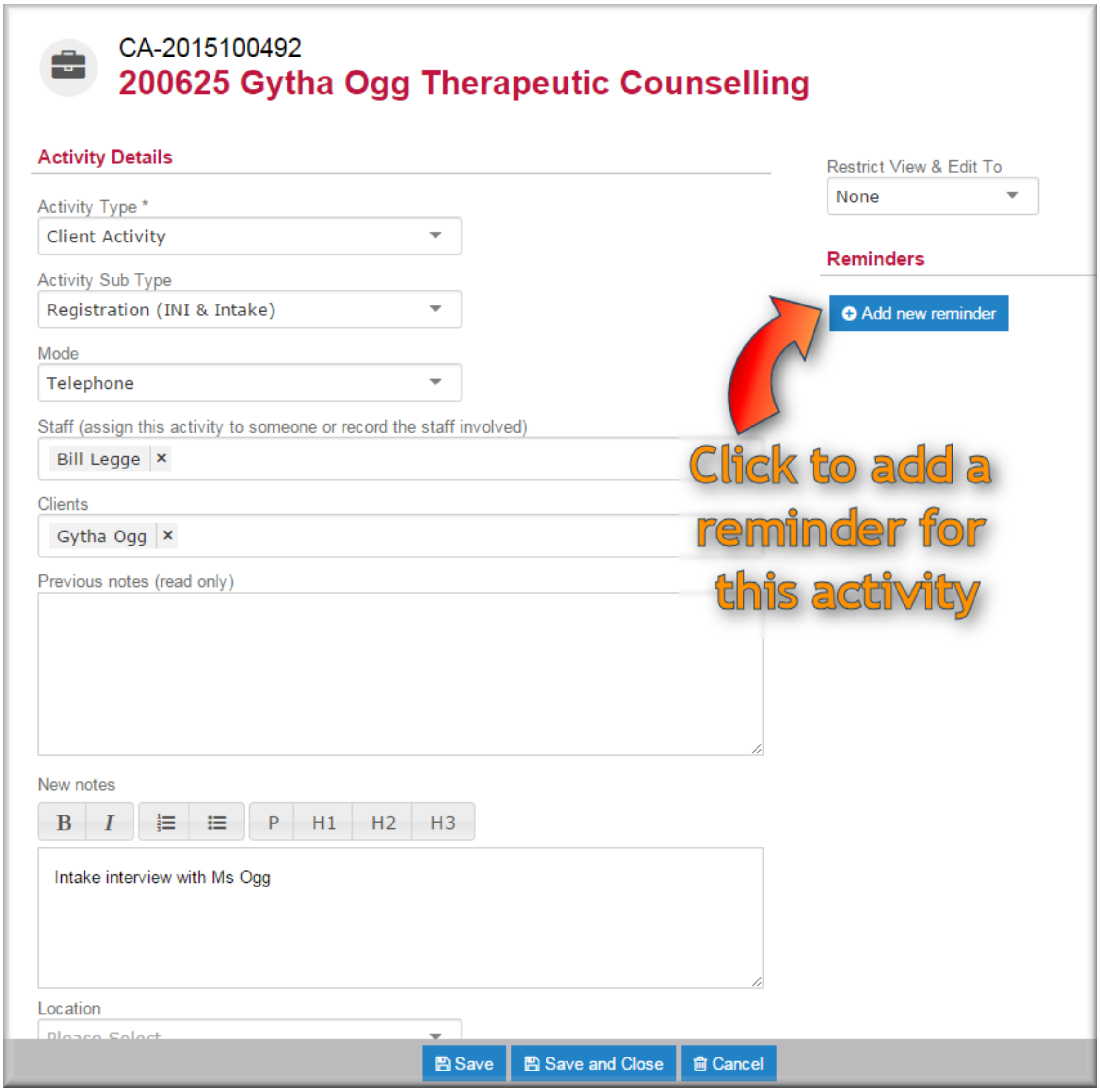
*Click to view a [video demonstration of how to schedule an activity](#).*

To schedule an activity:

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

**2** Using either of the methods above, open a new activity page.

*The illustration of this screen is presented in sections for better viewing.*




**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 activity types and sub types table for a list of the activity sub types.*

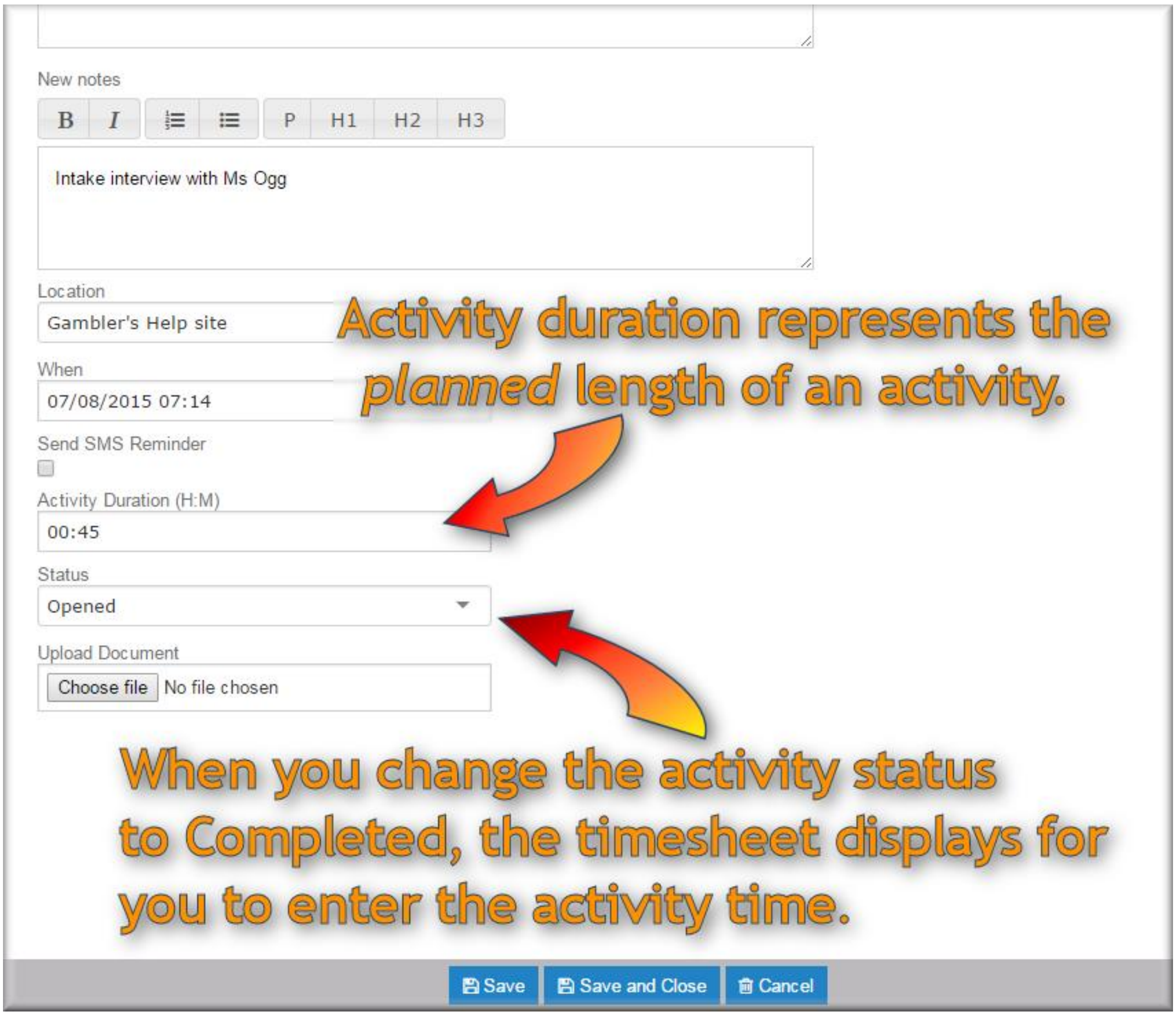
5 In the **Mode** field, select the contact mode:

- **Face to face**
- **Telephone**
- **Online**
- **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 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 an 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.

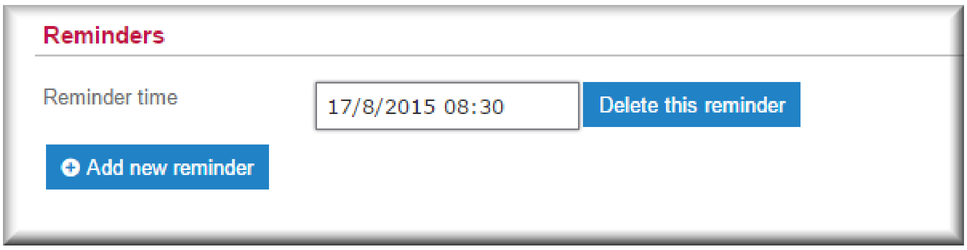
**13** Click Save and Close.
*The activity is scheduled.*

*You 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 an 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 then 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 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 **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 therapeutic or financial counselling 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.

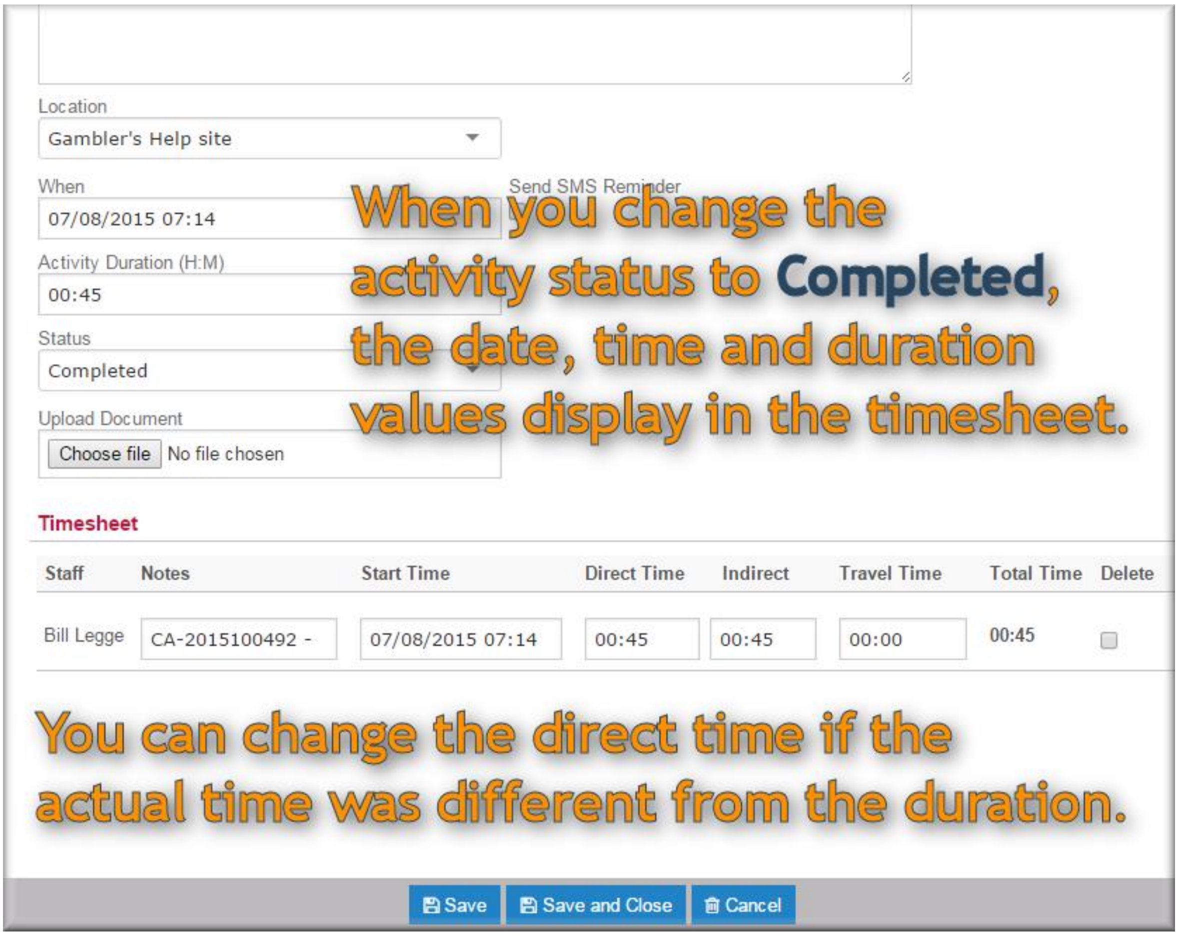
*Click to view a [video demonstration of how to complete a scheduled activity](#).*

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
- You 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.

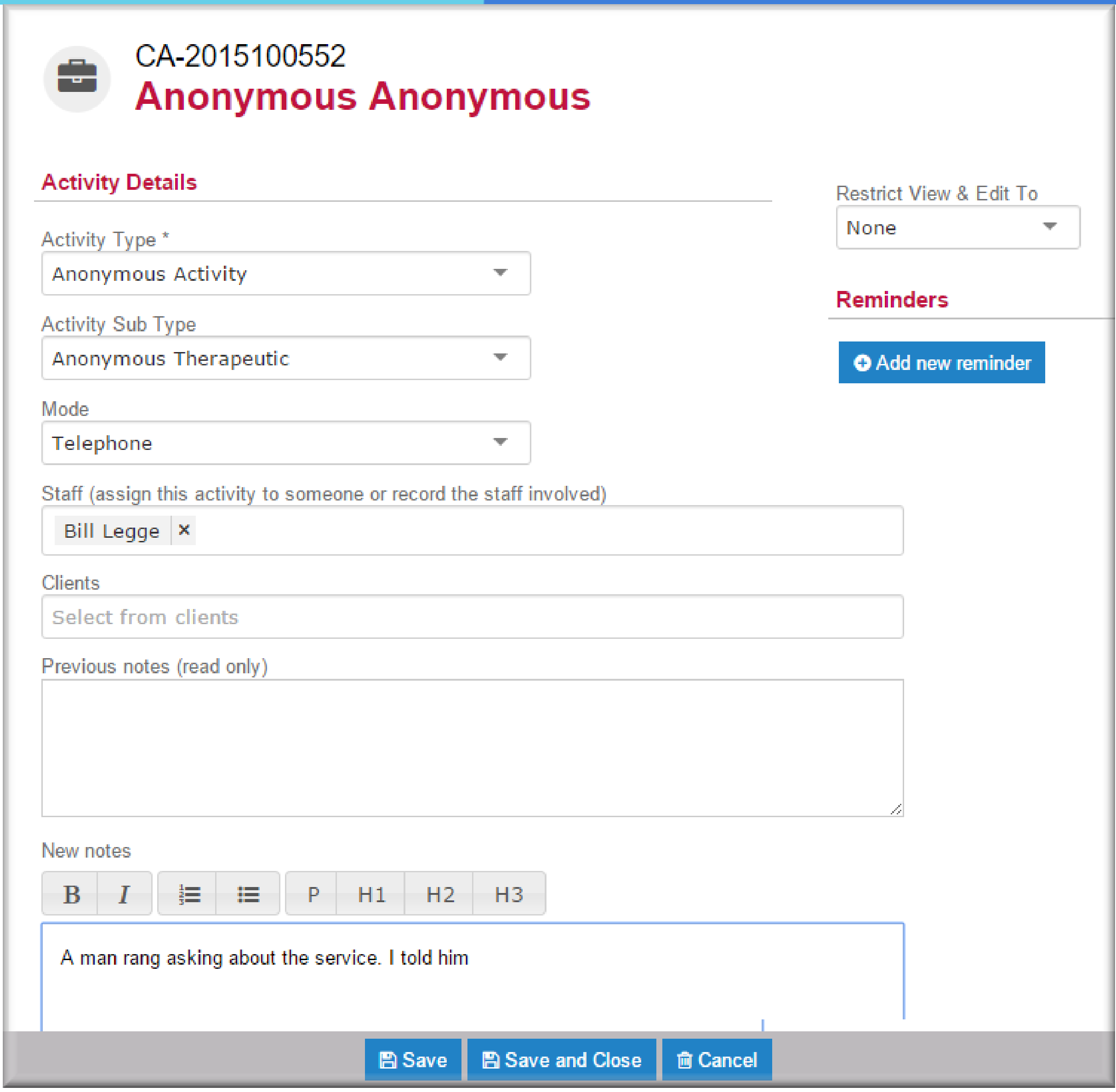
### Processing an anonymous activity

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**.

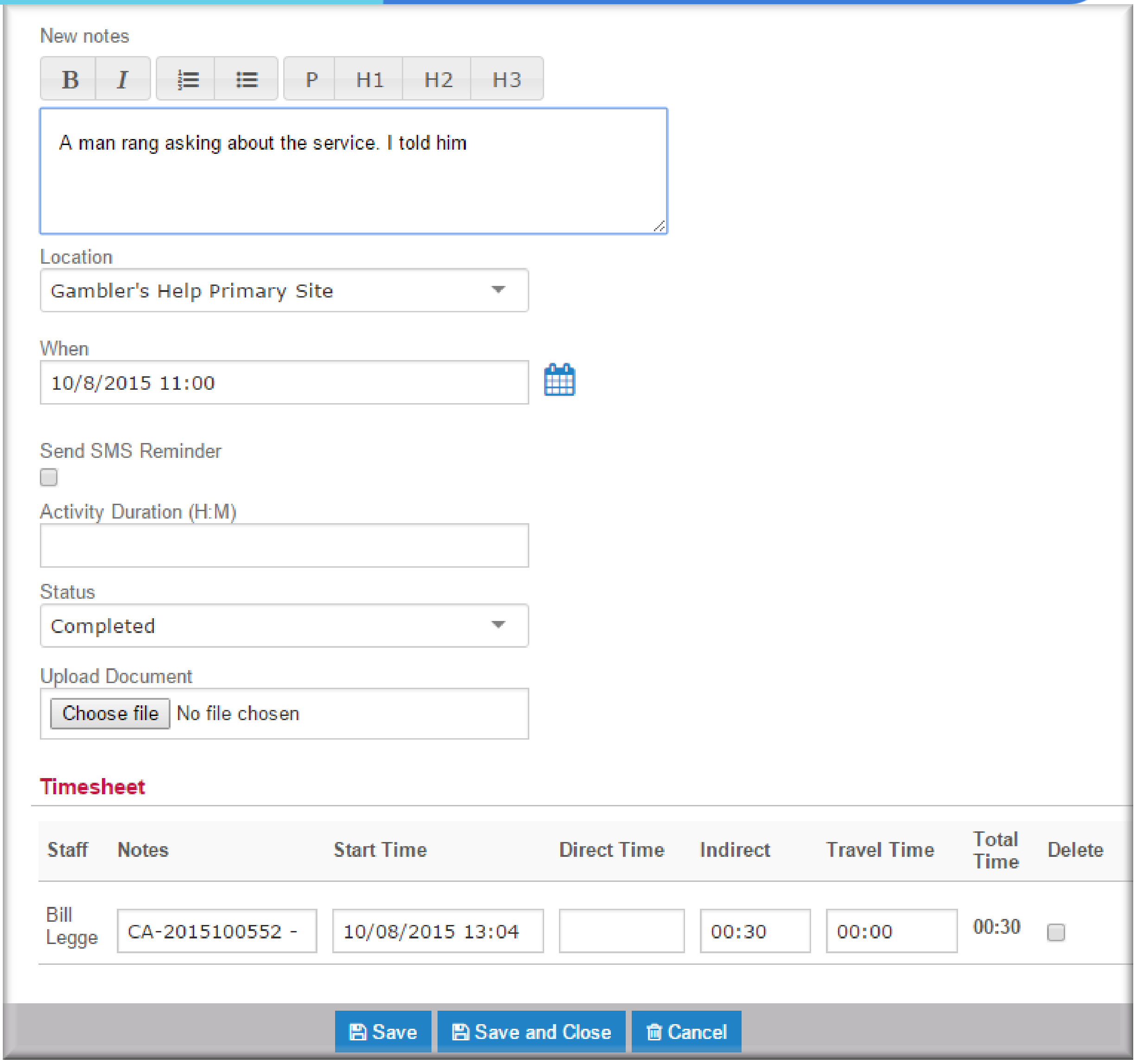
*For anonymous cases you only ever use the Anonymous Activity.*

**4** In the **Activity Sub Type** field, select the subtype:

- **Anonymous Therapeutic**
- **Anonymous Financial**.

**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.




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 activities with multiple staff

Some of your activities might involve more than one person working with the client. For example, a therapeutic counsellor might ask a financial counsellor to attend a session to conduct a financial assessment for RAP. Another example of an activity with more than one participating staff member might be a case review or secondary consultation. Group sessions also might involve participation of more than one counsellor.

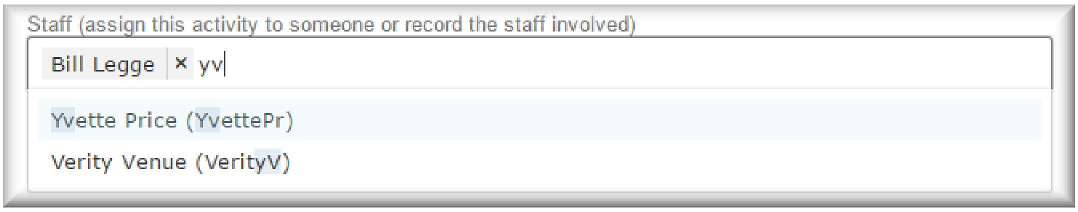
*If you want to add a colleague to the activity they must have an active* Gambler's Help Connect *login at your service.*

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.

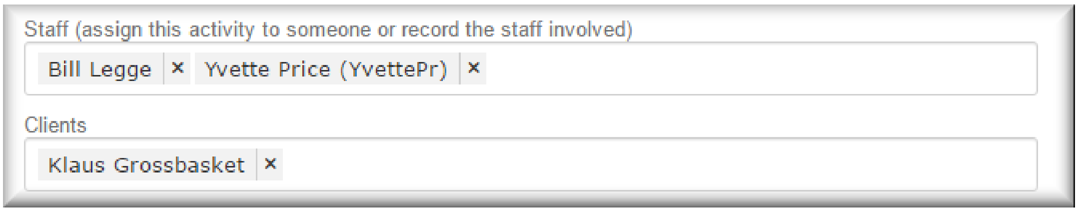
*The **Staff** field is a search field.*

To add a colleague to an activity:

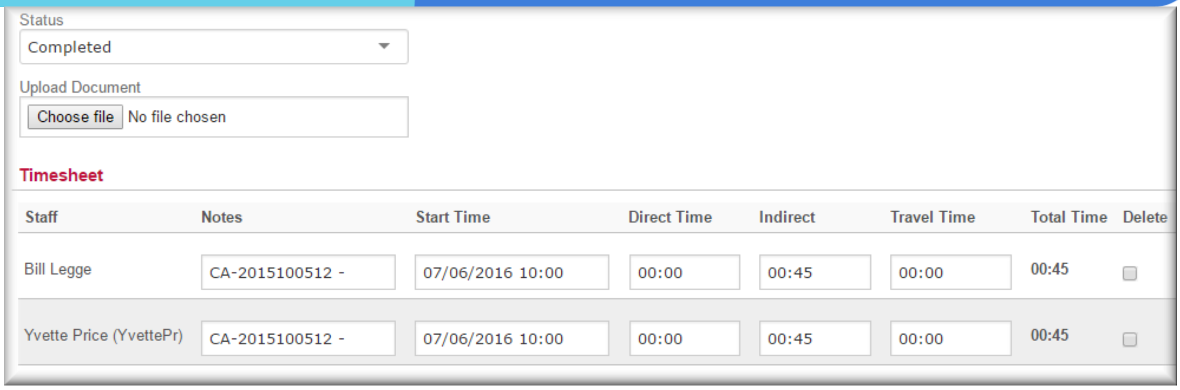
1. Open the activity for editing.
   *The activity displays in edit mode with your name in the **Staff** field.*
2. Specify the activity type, subtype and mode.
3. In the **Staff** field enter the first few letter of your colleague's name.
   *A list of names matching the letters you entered displays.*




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.*



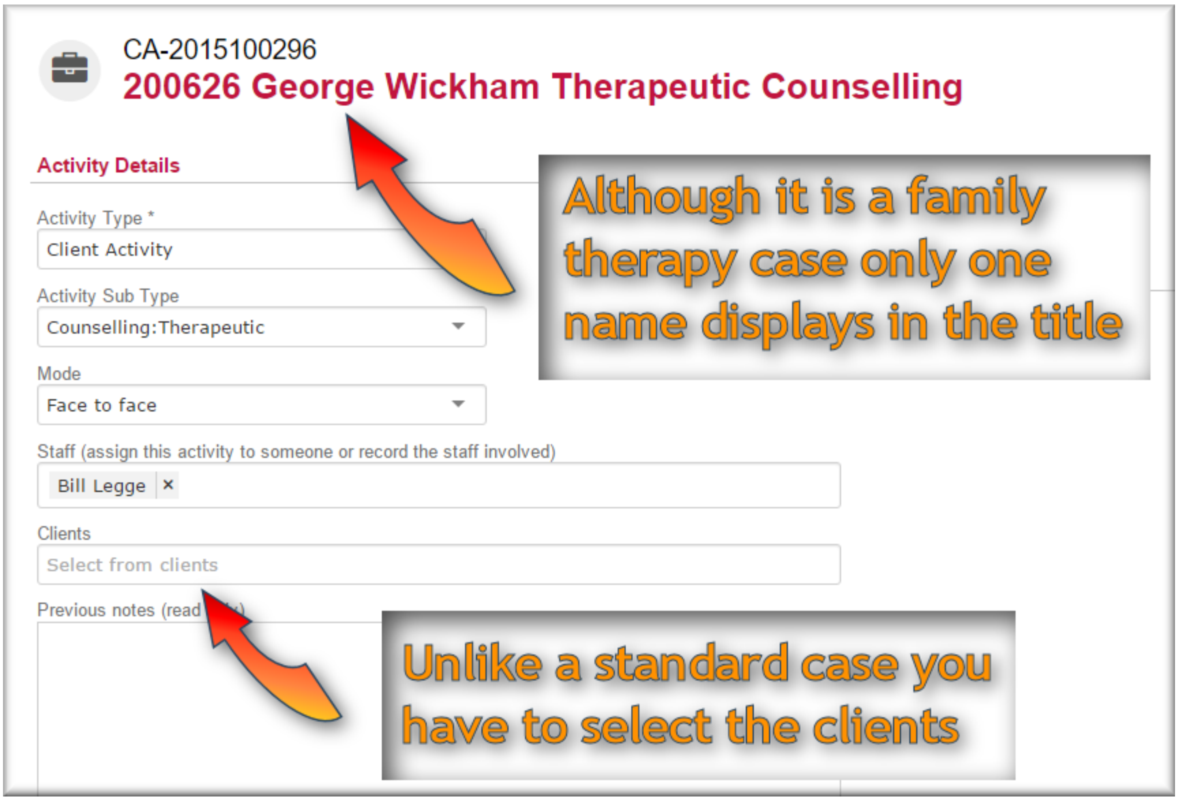

**7** Add the direct, indirect and travel times for each participating staff.

**8** Click Save and Close.

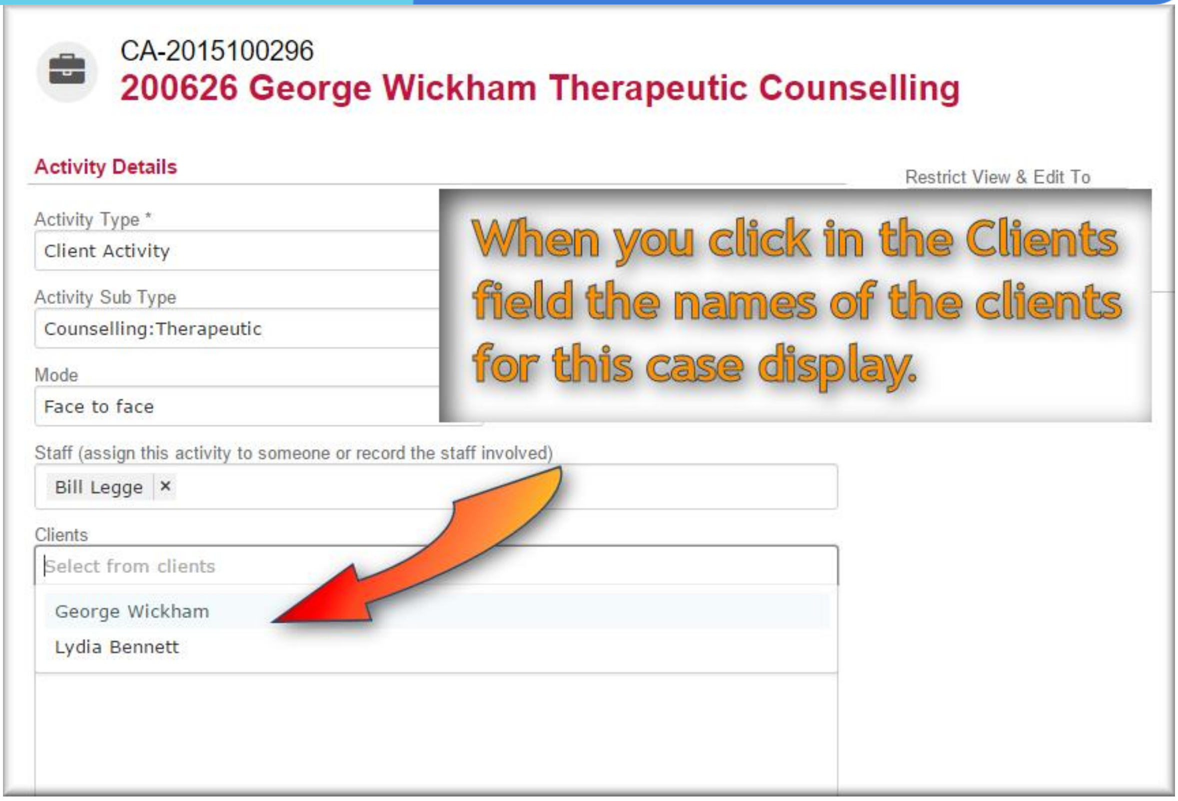
## Processing activities for a family therapy case

A family therapy case is the same as a standard therapeutic or financial counselling case except that more than one client is associated with the case. When you record activities for family therapy case 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 therapeutic or financial counselling 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 available clients 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 therapeutic or financial counselling activity.

*See Processing an unscheduled activity for a therapeutic or financial counselling case if you're not sure how to do this.*

## Processing activities for group case sessions

These activities involve more than one client and (usually) more than one staff. Typically, clients in group cases will have individual cases as well as their membership in a group case. 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 running and maintaining the group case.

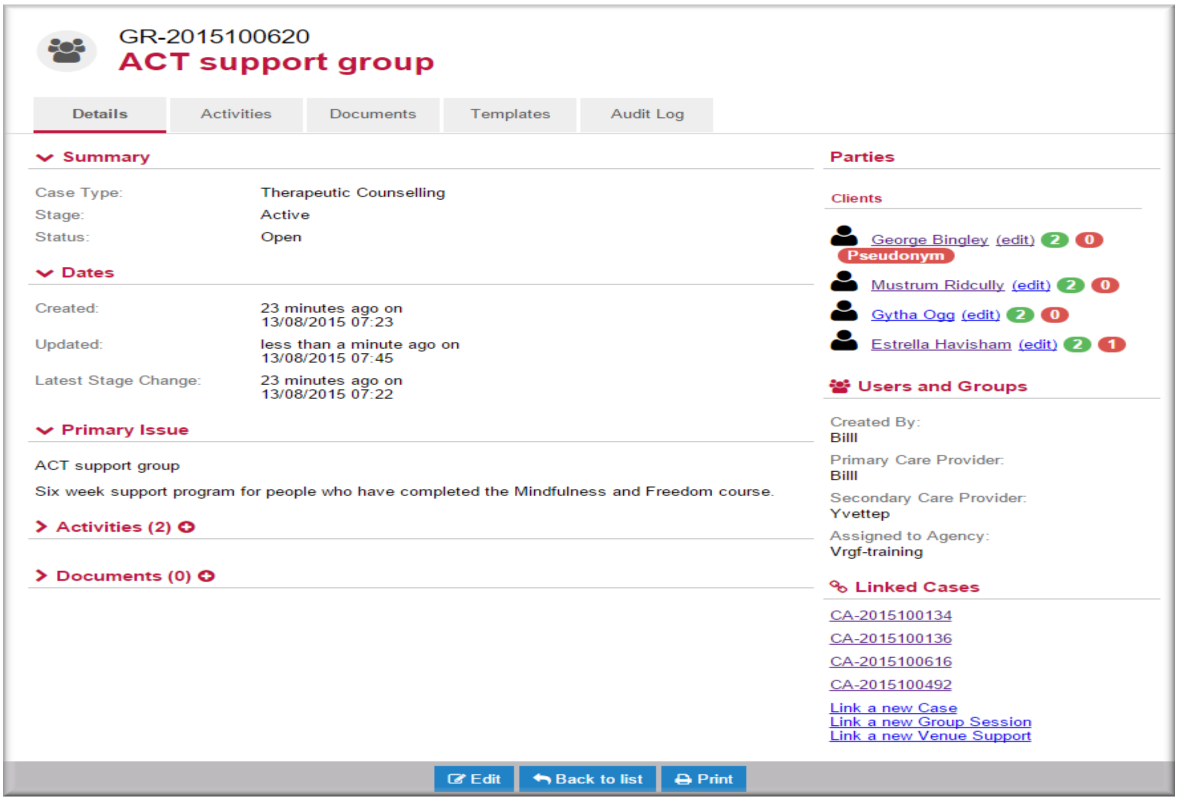
You can schedule group sessions as for other activity types. This will also allow you to ensure that clients who have consented will receive SMS reminders of upcoming sessions.

In general, you would only expect to record direct time against session type activities.

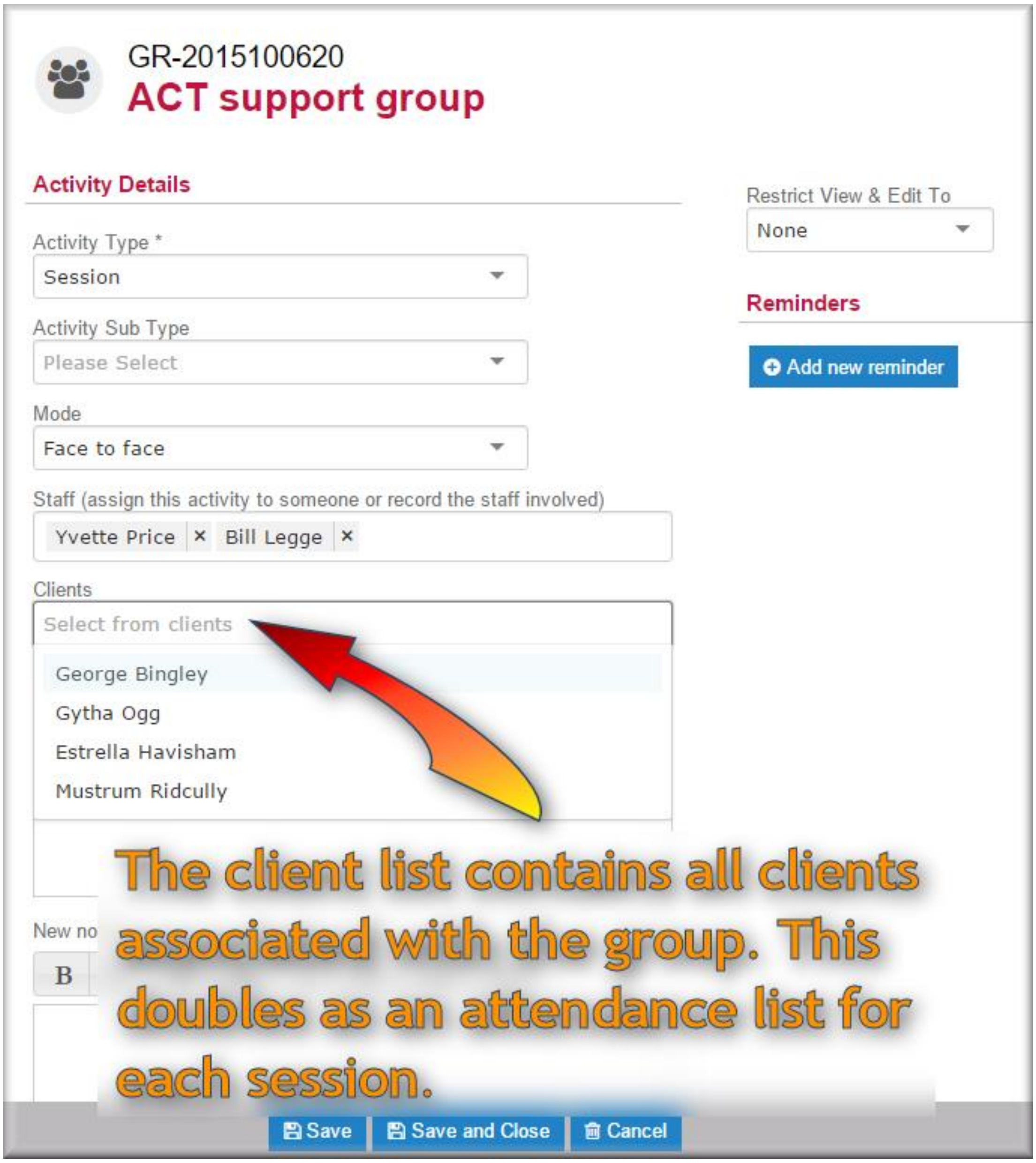
*Often the work done in a group session will spill over into individual work with clients. For example, after a group session you spend half an hour working with one of your clients on issues arising from their participation. Where this happens you should record a separate TC or FC activity against the client's individual case.*

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 the activity type is **Preparation** you don't need to select clients.*

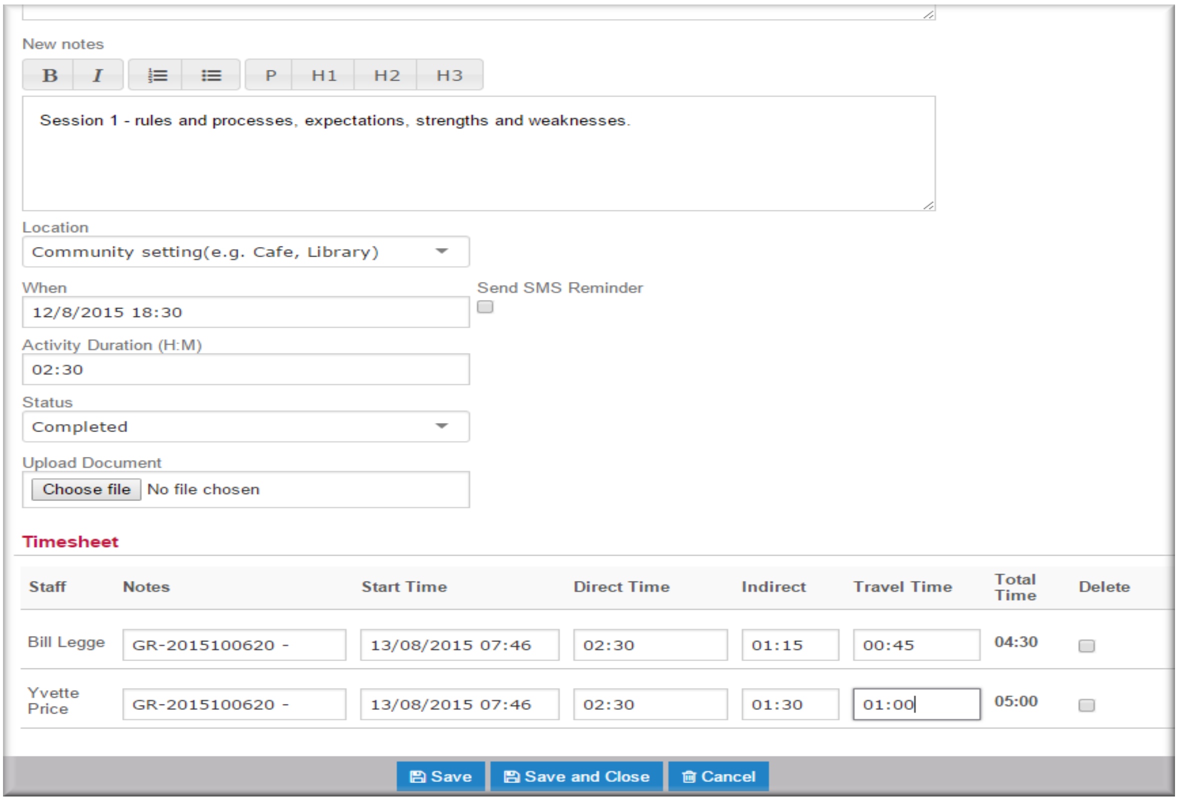
6 From the list in the **Clients** field, select each client who attended the session.

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 activity

You cancel activities by changing the status:

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

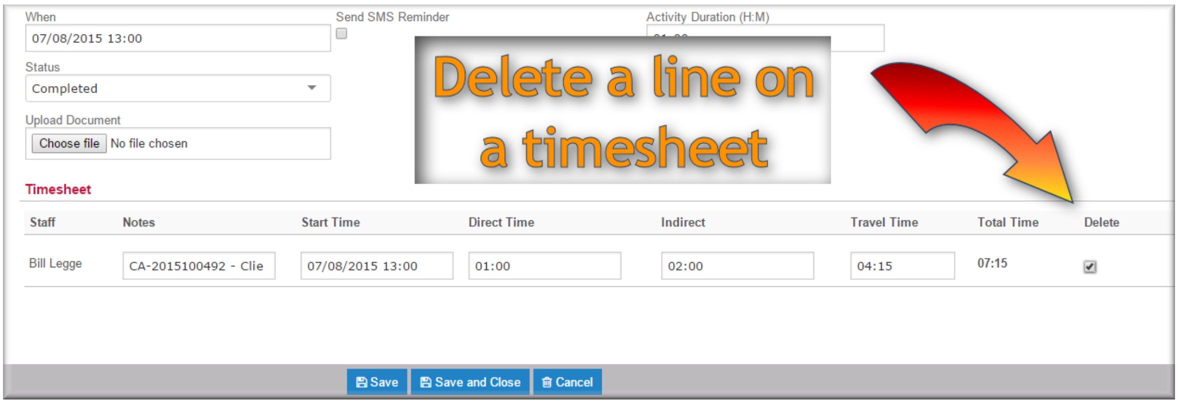
*If it's not your activity, you can locate it via either a case or activity search.*

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 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

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 plus such travel time as might have been required.

### 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 mode.
4. If required, in the **Staff** field add any other staff who were 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 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 files.*

3 Click Save and Close.

# 6 Managing cases

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

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

## Managing issues

It is common for clients who present to the Gambler's Help program to have co-presenting issues that compound the impact of their gambling problems. Such issues might be outcomes of gambling or they might be contributing factors in a gambling problem. By documenting issues you are able to enrich the case history and provide additional important information your colleagues who might need to work with the client.

You can use the Issues function in the *Gambler's Help Connect* case to document issues. You can add a description to each issue you document and also ascribe a resolution status to them.

*As part of the case record any issues your record are restricted to the agency where they were created.*

### Recording issues

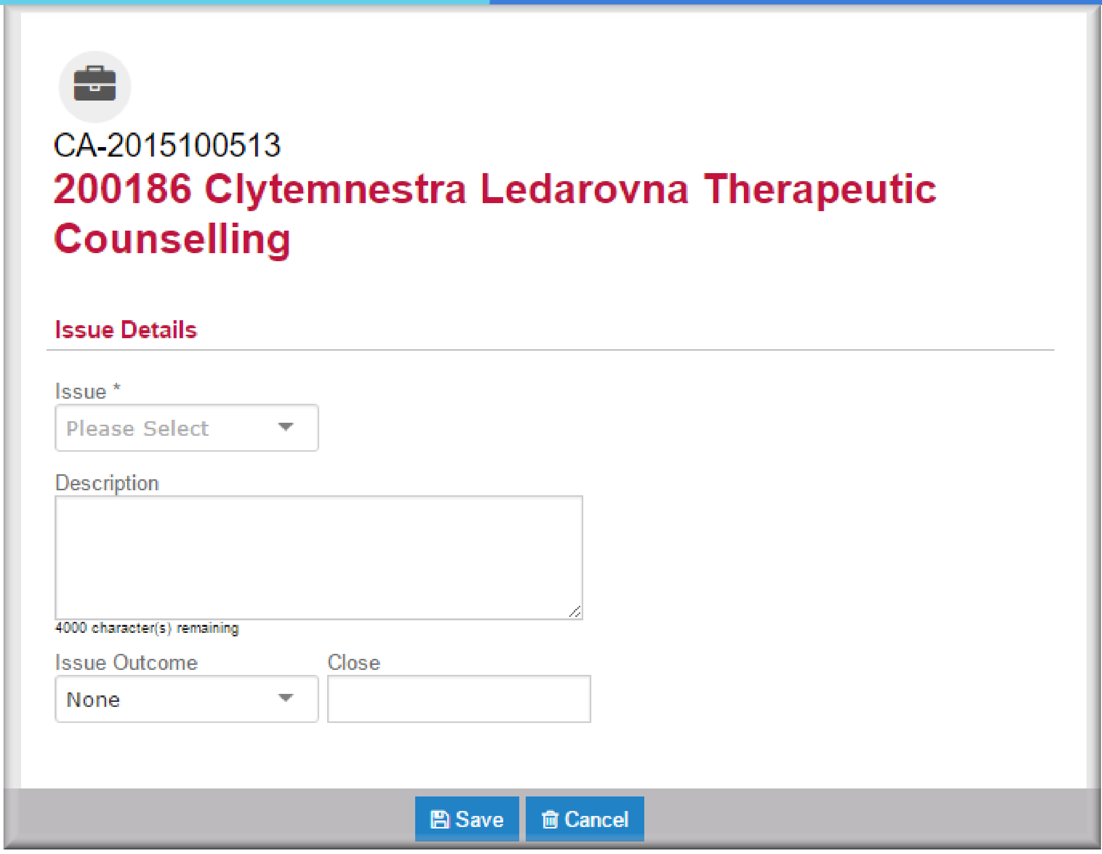
You can record co-presenting issues when a client initially presents, or subsequently as the case develops:

- In the **Add Issues** section of the edit case screen

*Refer to Complete the case record: Issues if you're not sure how to do this.*

- In the **Issues** tab of the case record
- In the **Details** tab of the case record in the **Issues** section.

1 In the **Issues** section click .
*The **Issue Details** screen for the case displays.*




**2** In the **Issue** field select the issue category

**3** Optionally, in the **Description** field, add notes describing the issue.

**4** Optionally, in the **Issue Outcome** field select the issue status.

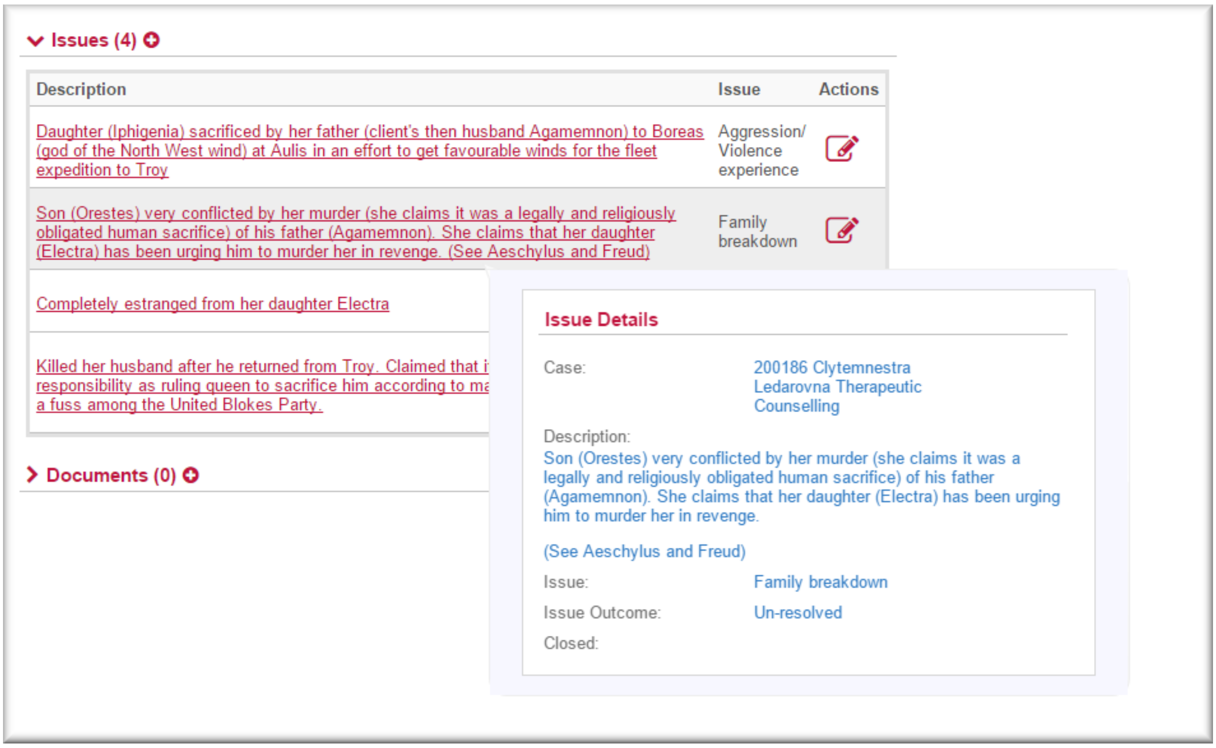
**5** Click Save.

*You can carry out the same process in the* ***Issues*** *tab by clicking* New Issue.

## Reviewing issues

You can review issues associated with a case in the **Issues** section of the case record on the **Details** tab.

1. Open the case you want to review.
2. Expand the **Issues** section.
3. Hover your mouse over the issue you want to review.
   *The issue details display.*

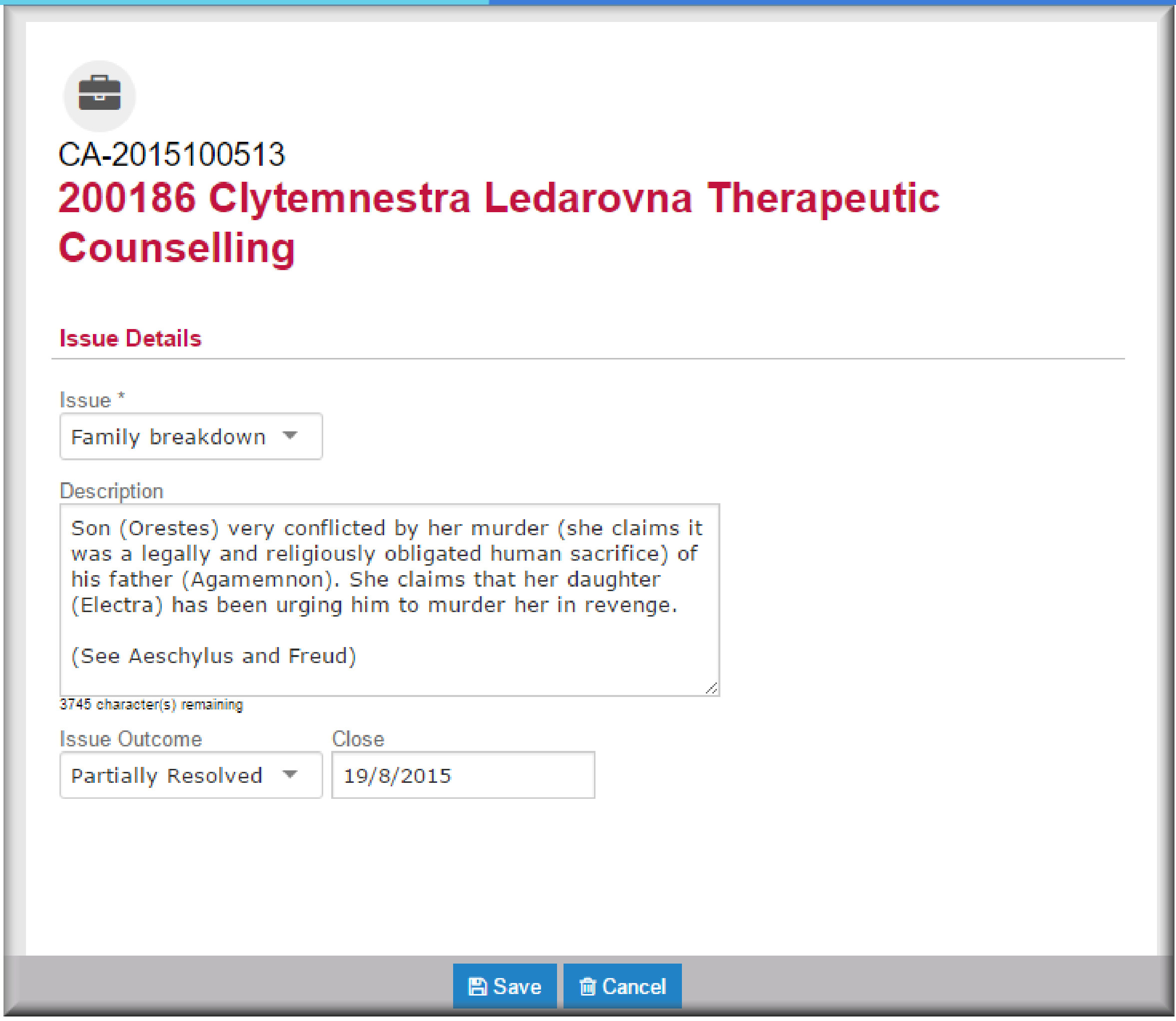



*To edit the issue click .*

## Editing issues

You can update an issue or mark an issue as closed if it no longer is an active influence on the case.

1. Open the case you want to review.
2. Expand the **Issues** section.
3. Click next to the issue you want to edit.
   *The **Issue Details** screen displays.*




4 In the **Description** field optionally add a note updating the issue details.

5 **IF** you want to close the issue:

- In the **Issue Outcome** field, select the outcome status.
- In the **Close** field, select the closure date.

6 Click **Save and Close**.

## Managing documents

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

*You cannot upload a document greater than 10Mb.*

### Adding a document

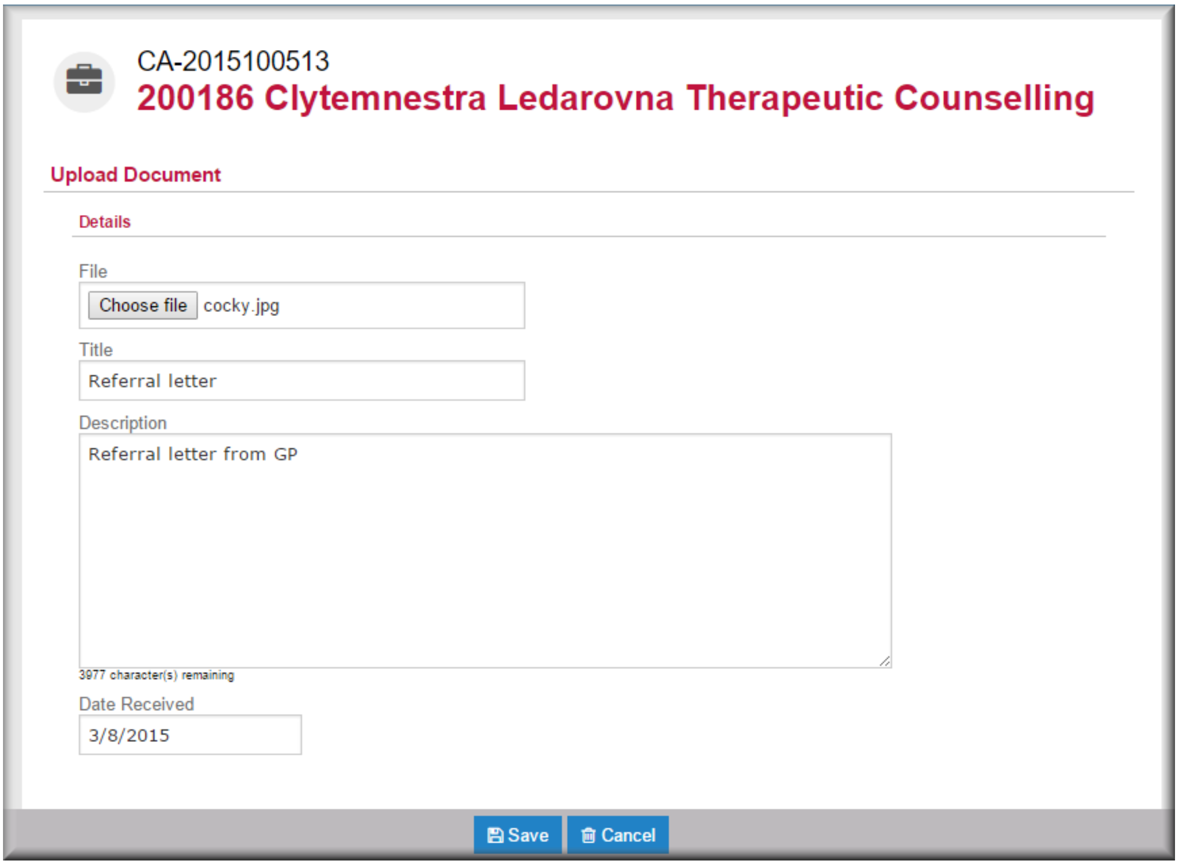
To add a document to a case you:

1 Save a copy of the document you want to attach to your PC or a network drive.

2 Open the case to which you want to attach the document.

3 Click the **Documents** tab.
*The **Documents** tab displays.*

4 Click Upload Document.
*The **Upload Document** screen displays.*




5 In the **File** field click Choose file.
*The standard Windows open file screen displays.*

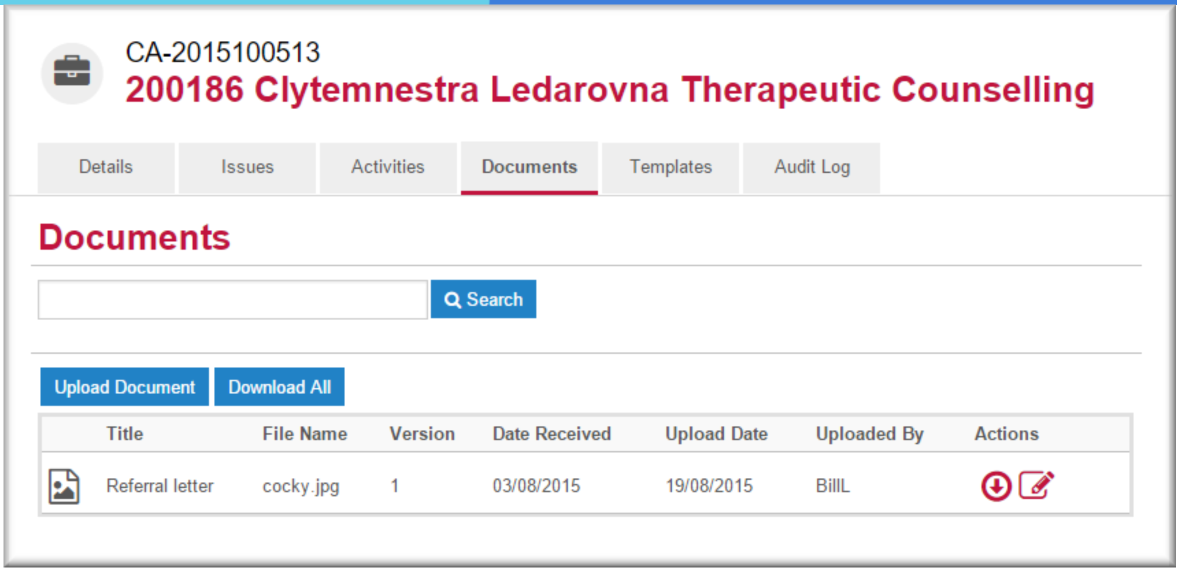
6 Locate the file you want to attach and click Open.
*You return to the **Upload Document** screen with the document listed in the **File*** field.

7 In the **Title** field enter the title you want for the document.

8 In the **Description** field enter a description of the document.

9 In the **Date Received** field select the date the document was received.

10 Click Save.
*The saved document displays in the documents list.*




### Downloading a document

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

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

## Using document templates

The **Templates** tab of the case record provides 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.

*Since these are generic documents common to all local services you need to print them on your agency letterhead.*

The templates you can use are:

- **Attendance Confirmation Letter** – send a letter to your client confirming their expected attendance at an appointment.
- **Copy of Correspondence** – cover letter to accompany copies of all correspondence received on the client's behalf (usually by a financial counsellor).
- **Closure for Client** – notice of case closure from a financial counsellor after client disengages without notice.
- **Consent to Share Information** – to record freely given informed consumer consent to share their information with a specific agency/ies for a specific purpose/s.
- **Discharge Summary** – a discharge checklist for the client listing goals, plans and resources to help them maintain their progress.

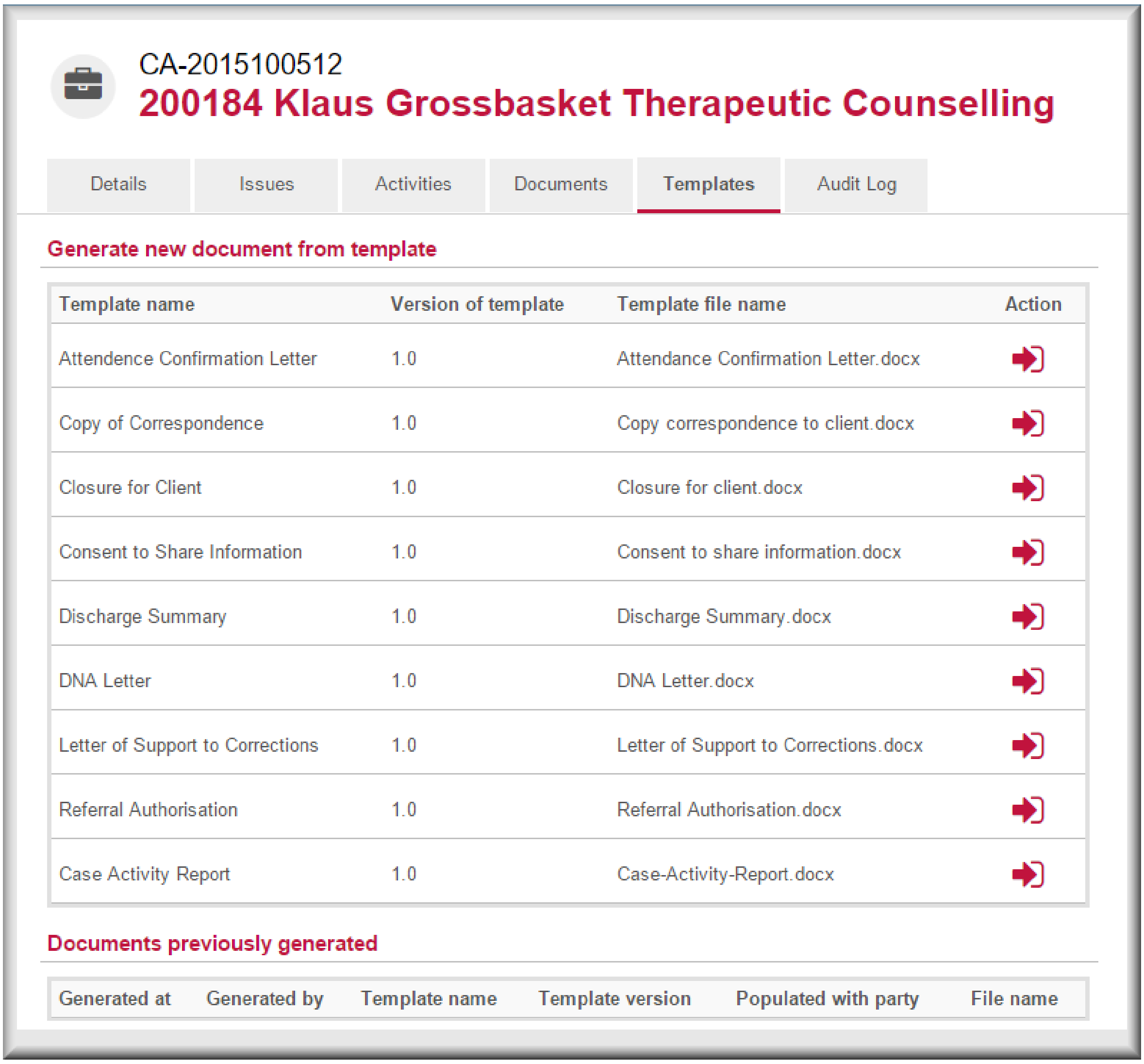
- **DNA Letter** – letter to client after they failed to attend an appointment without notice of cancellation.
- **Letter of Support to Corrections** – letter of support to Corrections from a therapeutic counsellor
- **Referral Authorisation** – authorisation for contact from another local service where client is changing agencies.
- **Case Activity Report** – list of all activities (all statuses) in a case including case notes.

*Should you identify a requirement for new templates, or changes to existing templates, you should talk to your* Gambler's Help Connect *reference group member at your agency or your manager.*

### Generating a template document

To generate a template document:

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



CA-2015100512

**200184 Klaus Grossbasket Therapeutic Counselling**

Details | Issues | Activities | Documents | **Templates** | Audit Log

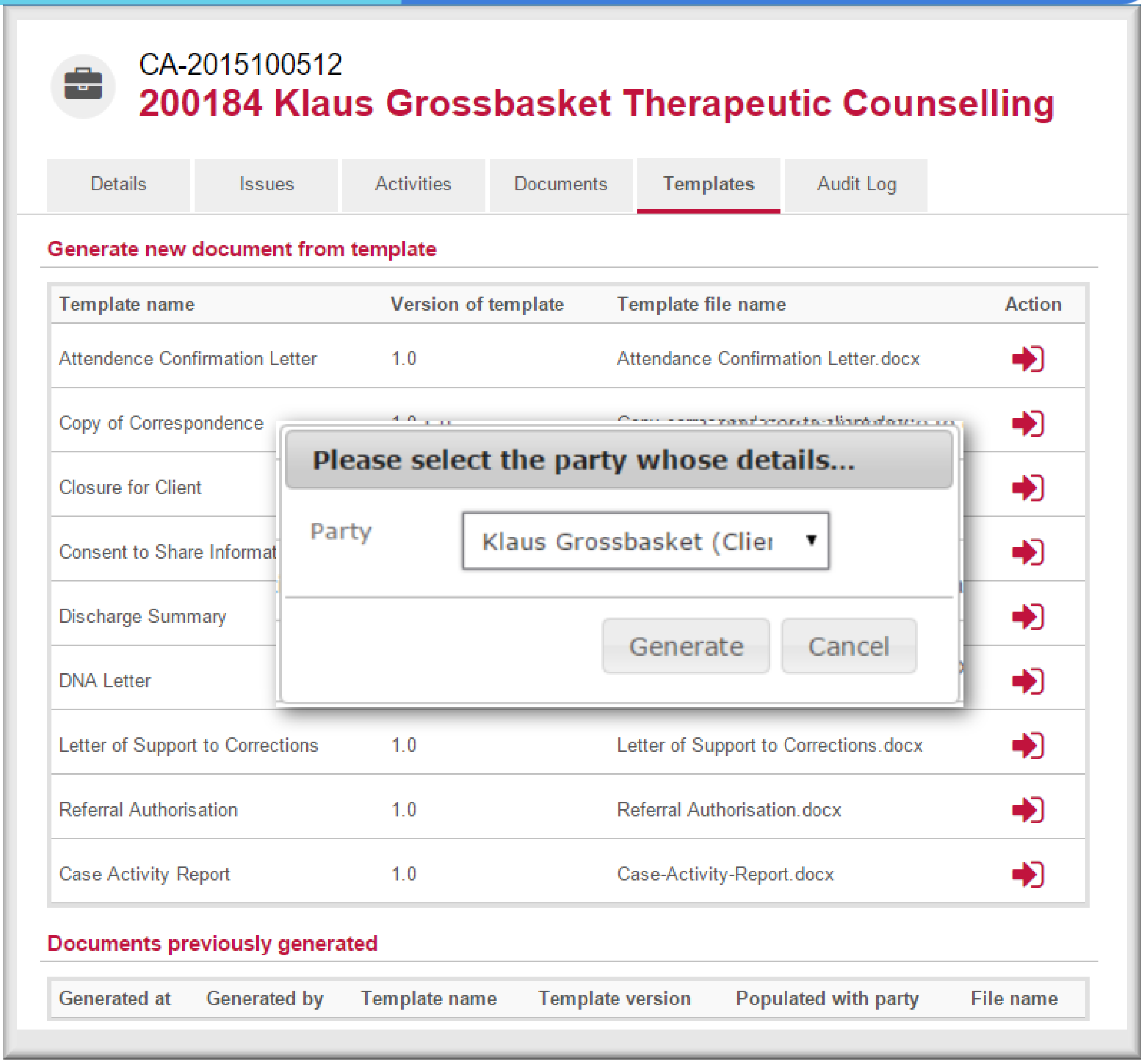
**Generate new document from template**

| Template name | Version of template | Template file name | Action |
|---|---|---|---|
| Attendence Confirmation Letter | 1.0 | Attendance Confirmation Letter.docx | |
| Copy of Correspondence | 1.0 | Copy correspondence to client.docx | |
| Closure for Client | 1.0 | Closure for client.docx | |
| Consent to Share Information | 1.0 | Consent to share information.docx | |
| Discharge Summary | 1.0 | Discharge Summary.docx | |
| DNA Letter | 1.0 | DNA Letter.docx | |
| Letter of Support to Corrections | 1.0 | Letter of Support to Corrections.docx | |
| Referral Authorisation | 1.0 | Referral Authorisation.docx | |
| Case Activity Report | 1.0 | Case-Activity-Report.docx | |

**Documents previously generated**

| Generated at | Generated by | Template name | Template version | Populated with party | File name |
|---|---|---|---|---|---|

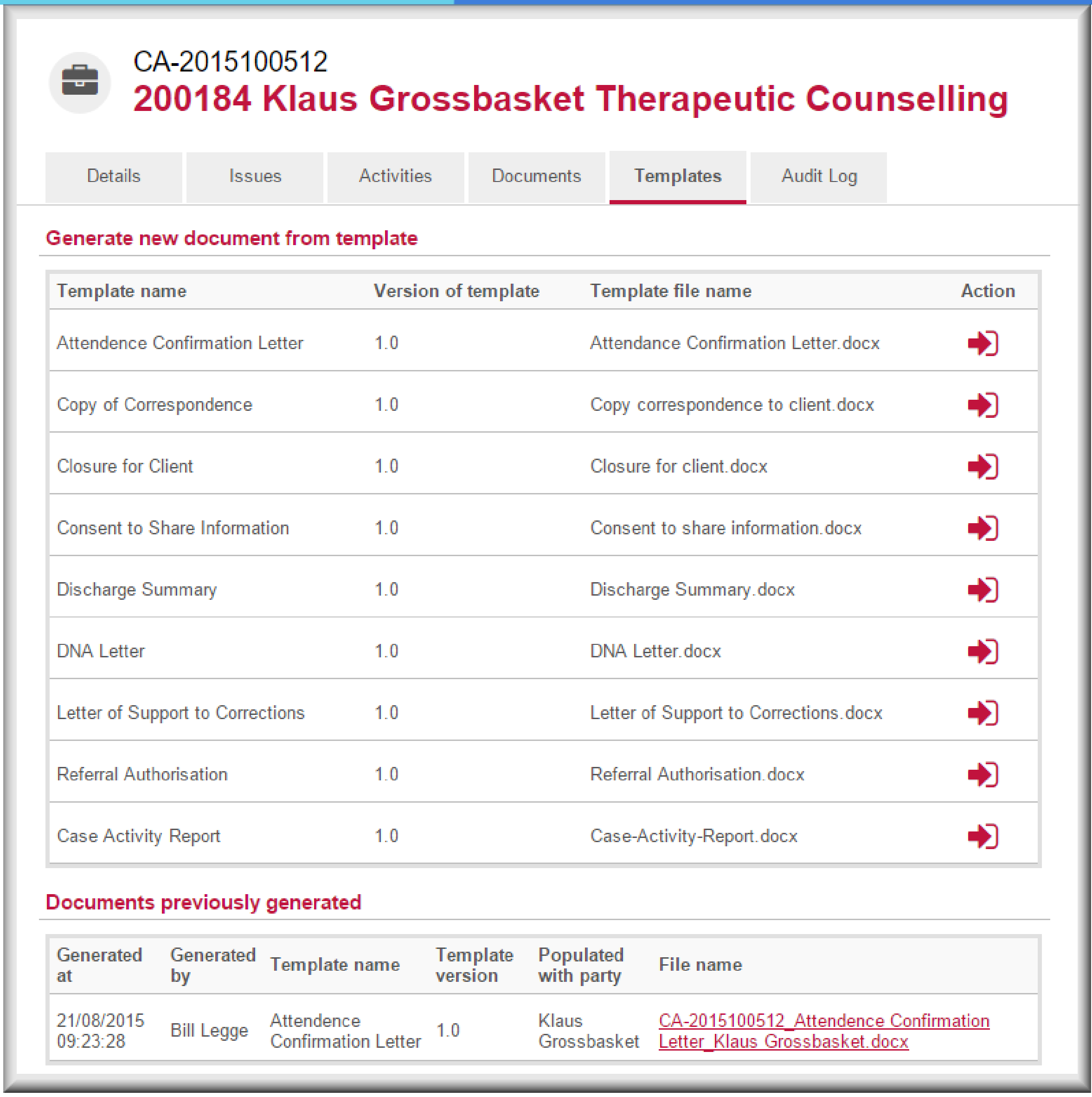
3. In the **Action** column of the list click for the template you want to use.
   *The* **Please select party...** popup displays.




**4** In the **Party** field select the client for whom you want to generate the template.

**5** Click Generate

*Gambler's Help Connect generates a word document based on the template and displays it in the* **Documents previously generated** list.




**6** 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.*

**7** You can now open the document for further editing or printing.

## 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 can use the case link function if the client comes back to your agency, to indicate the connection between the old and new case if this is relevant.

You close a case when:

- Your therapeutic treatment program with the client is complete
- Your financial counselling 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.*

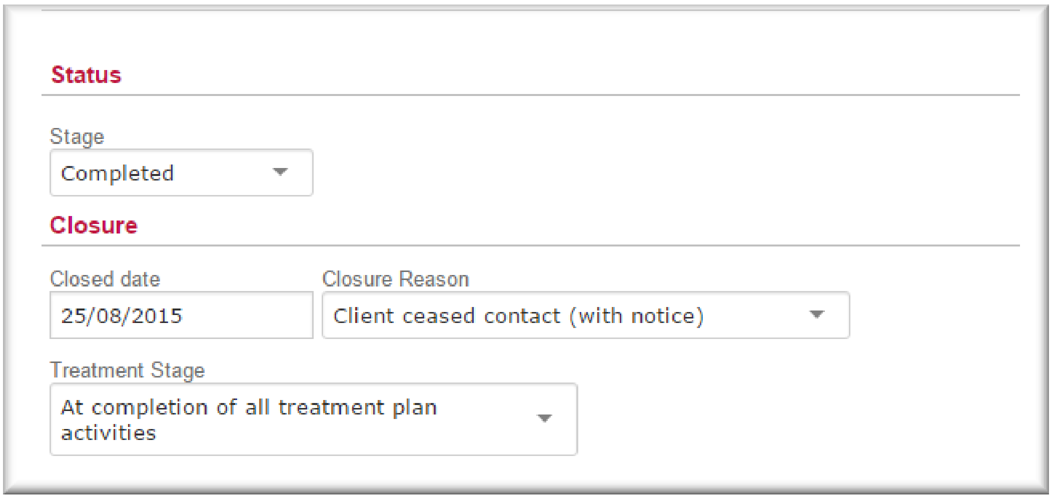
Before closing a case you should cancel or complete any open activities. If the client has not been in contact you might also do an assertive engagement to find out whether they want to discontinue their service. Your local practice might also mandate that you conduct a case conference or review before proceeding with closure.

## Closing a therapeutic or financial counselling 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.

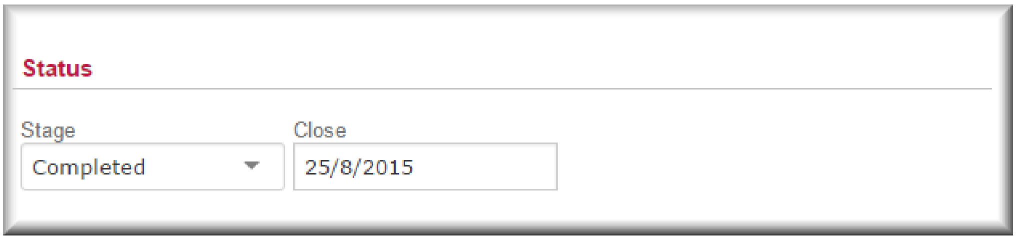
8 Click Save

*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.*