Gambler's Help Connect for venus support workers

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Document Information

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Audience	venue support workers		
Project	GHC1606.1		
Document ID	**Error! Unknown document property name.**–		
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Document History

Status	Changes	By	Date
Version 1606.1	First Draft	Bill Legge	23/6/16

Contents

1 Summary 1

2 Key concepts for venue support workers 2

Types of cases 3

Venues 3

Activities 4

Training content activities 5

Some common terms 5

Agencies and teams 6

3 Creating cases 7

Creating venue based case 8

Creating an *ad hoc* case 12

Non-plan based cases 15

4 Recording venue support worker activities 16

Processing an activity 17

Scheduling an activity 19

Setting reminders for an activity 19

Rescheduling activities 20

Completing a scheduled activity 20

Processing activities for cases with more than one venue 21

Attaching documents to activities 30

Cancelling a scheduled activity 30

Cancelling a completed activity 30

5 Managing cases 32

Attaching documents to venue support cases 33

Downloading a document 35

Closing venue support cases 36

1 Summary

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

- *Gambler's Help Connect* concepts for venue support workers
- Creating venues and cases in *Gambler's Help Connect*
- Recording activities
- Managing cases.

2 Key concepts for venue support workers

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

Every case has the following characteristics:

- It is associated with a venue (or group of venues)

  The exception to this is your ***program*** *case against which you report venue support related activities not associated with a venue or group of venues.*

- A primary and optionally a secondary venue support worker has 'ownership' of the case
- Work done with the associated venue (or venues) is reported against the case as *activities.*

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

Types of cases

There are three principal case types:

- **Venue**: for each of the venues that you support you create a dedicated case where you report all work that you do solely for that venue.
- **Ad hoc group**: from time to time you might run a training program at one venue location where staff from a number of other venues attend. In this situation you create an *ad hoc* case and associate each of the participating venues with it. This enables you to record the training preparation, organisation and delivery activities against all the relevant venues while still being able to record the training feedback information against the venue specific to the participants. Typically, you close the case upon completion of the training program.
- **Program**: some of the work you do cannot be assigned to an individual venue. For example, researching gambling behaviours of people in your district in order to update one of your training programs applies to all of your venues – so you report this activity against your program case. You have a program case for each catchment you cover. You only need one of these per team since all members of your team can report program activities against the one program case.

Venues

Each venue has a unique record. You associate venue records with cases. The venue record contain details including:

- Key personnel identities and contact details
- Operating hours, number of EGMs and average expenditure
- Responsible Gambling and Self-Exclusion codes.

You can update venue records in line with personnel changes or changes to the gaming program. All venue records are available to all VSW users. For the venue support program case there is a venue named *Venue Support Program (non-plan based)* which you then associate with the case.

Gambler's Help Connect *is pre-loaded with the basic details of all the participating venues. Part of your work will be to add venue support relevant information to each of these venue records.*

From time to time a new venue might be established in your catchment, however this will be an infrequent event. You should only ever create a new venue in consultation with the manager of the Venue Support Program at the foundation.

Gambler's Help community education workers also use organisation records for the schools and sporting clubs they work with. Since some sporting clubs also run gaming venues it is not impossible that the same organisation could be associated with both a community education AND a venue support case.

Activities

You record the work you do against the program or venue cases in *activities*. Activities are always associated with a case. They record the work done, the staff and venue(s) involved and the work and travel time required. You might record activities against a venue case or your venue support program case.

The table below lists the different activity types and sub-type you can use. (Venue support program activity types are shaded blue. Planning is pink because it can be used in either context.)

Activity type	Activity sub-type
Administrative	None
Professional Development	○ PD Training Session ○ VSW Peer Meeting ○ Other
Relationship Building	○ Meeting with Management ○ Support Visit ○ Venue Visit
Planning	○ Organise Training ○ Developing Support Content ○ Developing Training Content
Monitoring	○ Reporting/Data Entry ○ Research Review & Information Gathering ○ Review & Revision of Material
Delivering Training and Support	○ Delivery of Support Materials ○ Delivery of Training ○ Entering Training Data ○ Support Visit ○ Venue Visit

Training content activities

In addition to the activity types and subtypes described above, there is a list of training content activities that you will also ascribe to relevant activities. You can add more than one of these to an activity where you have provided more than one training module in a venue session. These are:

- Venue Support Program
- Self-Exclusion
- RG Code of Conduct
- Responding to Signs
- Player Information & EGM Myths
- Observable Signs
- GH Services
- Cognitive Impairment
- CALD Patrons
- Drug Affected Patrons.

You **ALWAYS** use (at least) one of these when the activity type is *Delivering Training and Support* and you *might* use these when the activity type is *Planning*.

Some common terms

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

Navigation Option	Definition
Dashboards	View key statistics
New Venue Support	Create a new venue support case
My Cases	View and access your assigned venue support cases
My Activities	Your pending (or overdue) activities
Cases	Search cases from your agency or ALL agencies
Organisations	Search for a venue
Activities	Displays all your activities, most recent at the top. You can search particular activities here too
Documents	View documents attached to cases or activities

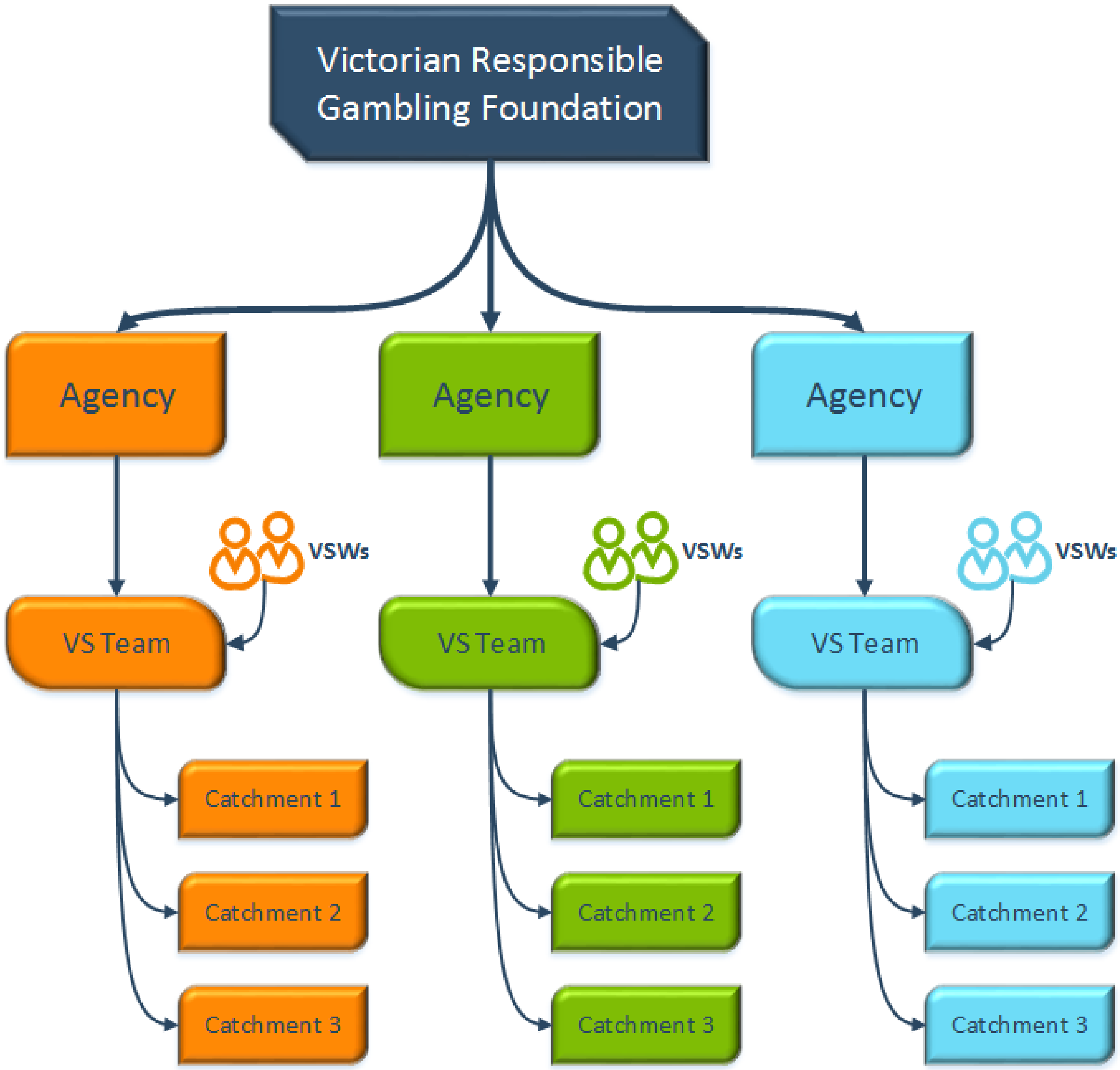
Agencies and teams

In *Gambler's Help Connect* teams are structured in a hierarchy of parent and child. Your agency is the 'parent' agency your VS team is your 'home' team and each of your catchments are a separate 'child'. You associate your venues and cases with catchments.

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

All VSW users can see **all** venues.

Here is an illustration showing the hierarchy.



3 Creating cases

This section describes the procedures you use to create cases in *Gambler's Help Connect*:

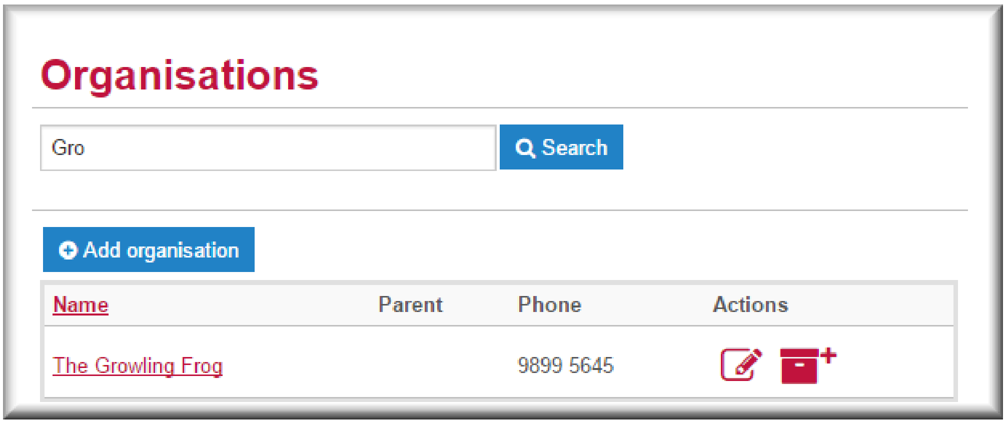
- Venue cases associated with the venues you support
- *Ad hoc* cases you create when setting and running multi-venue training programs
- Your program case you use to record catchment level activities.

Creating venue based case

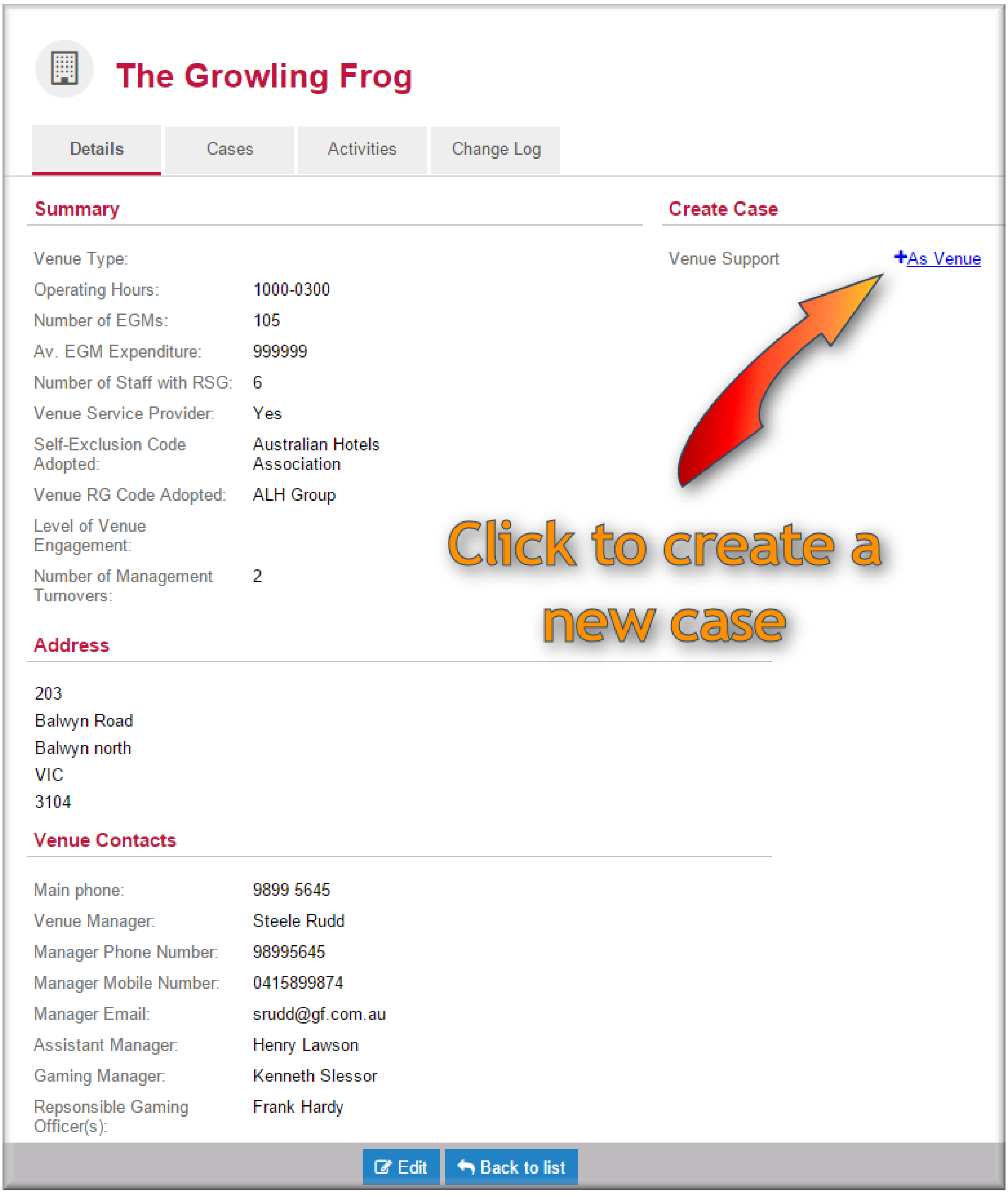
To create a new case, you start by searching for the venue you want to associate the case with.

1 In the **Search** menu select **Organisations**.
*The **Organisations** search screen displays, showing the complete list of all venues.*

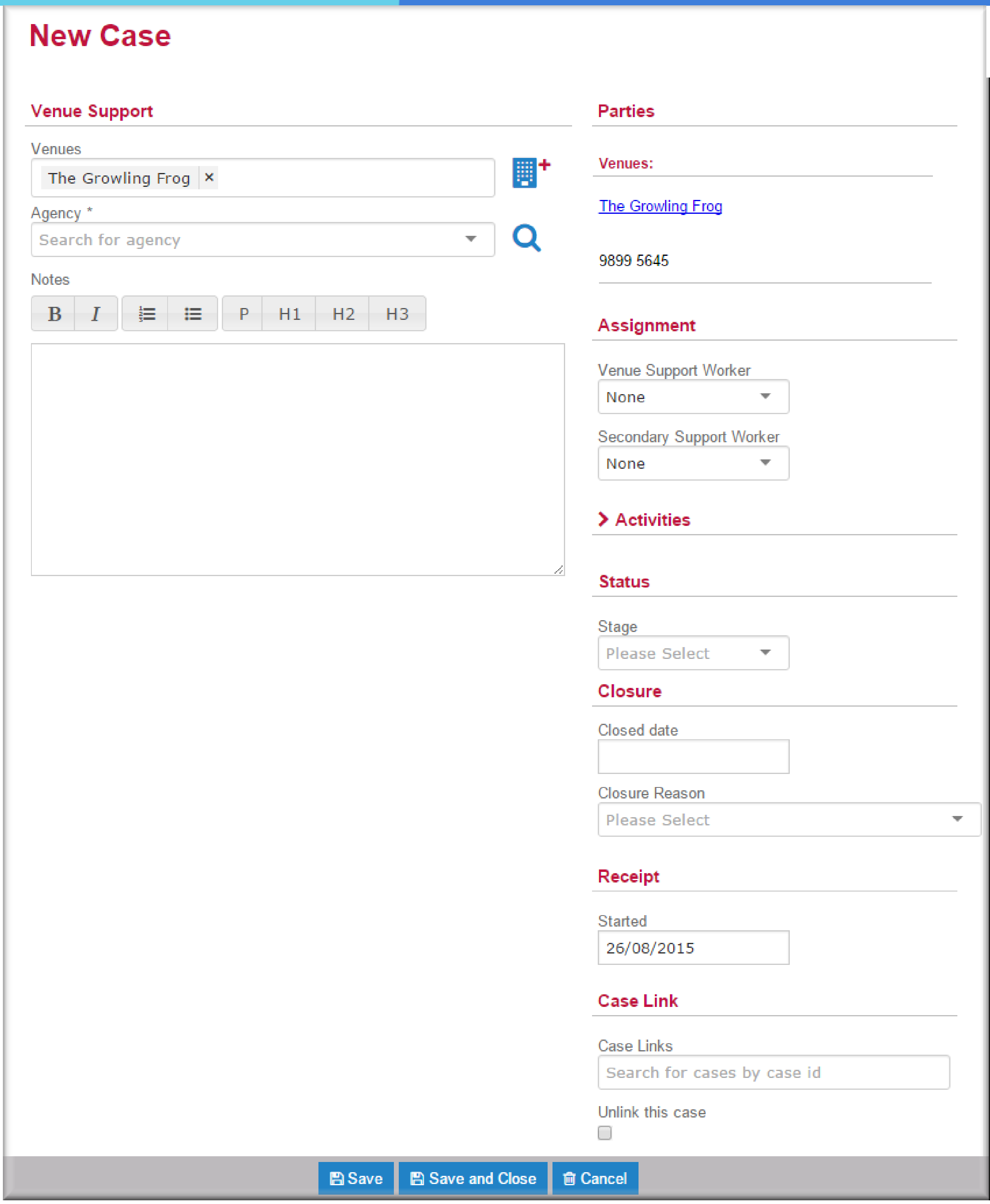
2 In the search field enter the first few letters of the venue name then click **Search**.
Venues matching your search term display.



3 Click the venue name link.
The venue record opens in view mode.



4 In the **Create Case** section click +As Venue.
The **New Case** *screen displays with the venue name displayed in the* **Venues** field.



5 In the **Agency** field select the non-client catchment for this venue.

MAKE SURE you select the non-client catchment for your agency. If you select the client team the case will disappear from your desktop and you'll have to ask someone to reassign it for you.

6 Optionally, in the **Notes** field enter relevant notes about the venue that will inform your approach to working with the venue in this case.

7 In the **Assignment** section in the **Venue Support Worker**, select the name of the person who will be the primary owner of this case.

8 In the **Status** section, in the **Stage** field, **In Progress**.

9 Click **Save and Close**.
The new case is created and will now display in the ***My Cases*** *list of the assigned venue support worker.*

Creating an *ad hoc* case

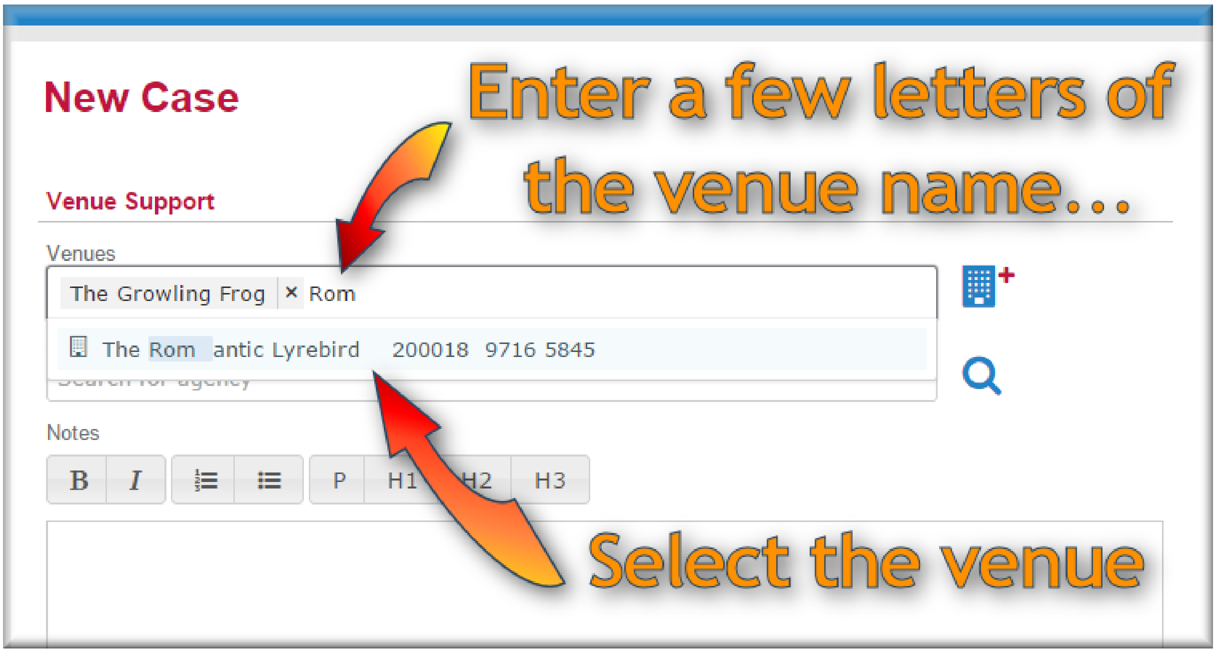
From time to time you might organise a training session involving people from more than one venue. To record this in *Gambler's Help Connect*, you create an *ad hoc* case with each of the participating venues.

There might be times when the ad hoc case will include venues from different catchments. If this happens you must create a separate case for each catchment.

To create an *ad hoc* case:

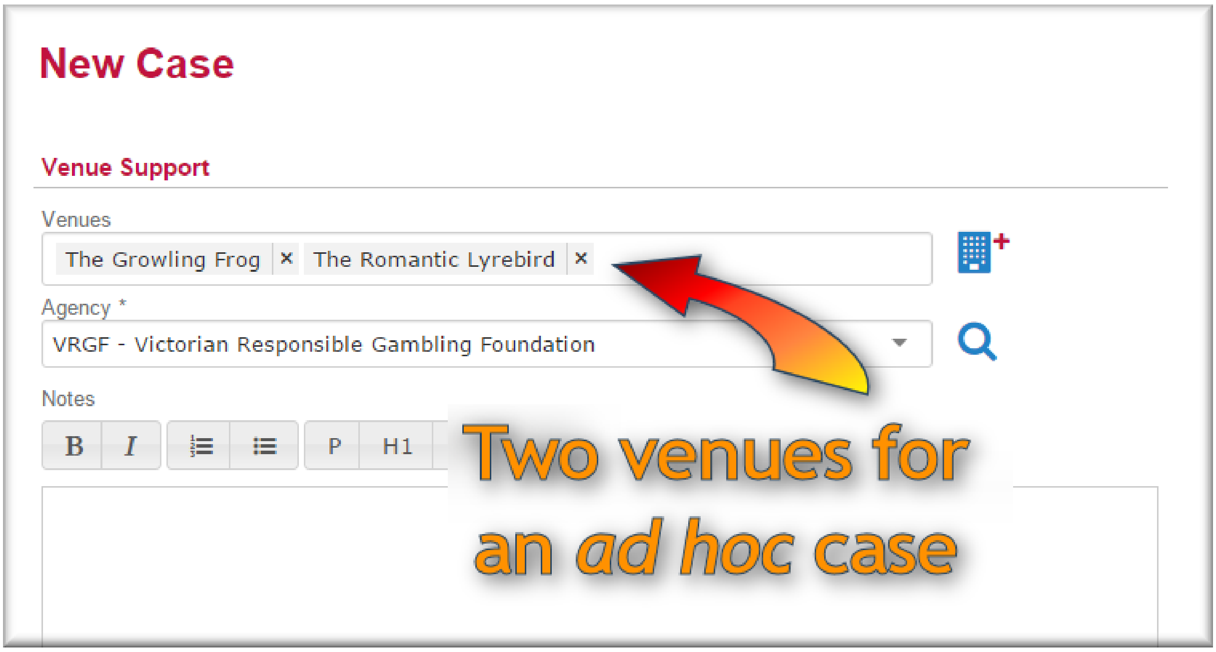
1 From the **Operations** menu select **New Venue Support**.
*The New Case screen displays with no venues displayed in the **Venues** field.*

2 In the **Venues** field, enter the first few letters of the name of a venue you want for the case.
A list of venues matching your search criteria displays.



3 Select the venue you want.

4 Repeat steps **2-3** until all your desired venues display in the **Venues** field.



5 In the **Agency** field, select the non-client catchment for this venue.

6 In the **Notes** field enter relevant notes about the training program that you will deliver in this case.

7 In the **Assignment** section, in the **Venue Support Worker**, select the name of the person who will be the primary owner of this case.

8 In the **Status** section, in the **Stage** field, **In Progress**.

These next steps are optional but provide a very good way of contextualising the ad hoc case against the annual venue cases.

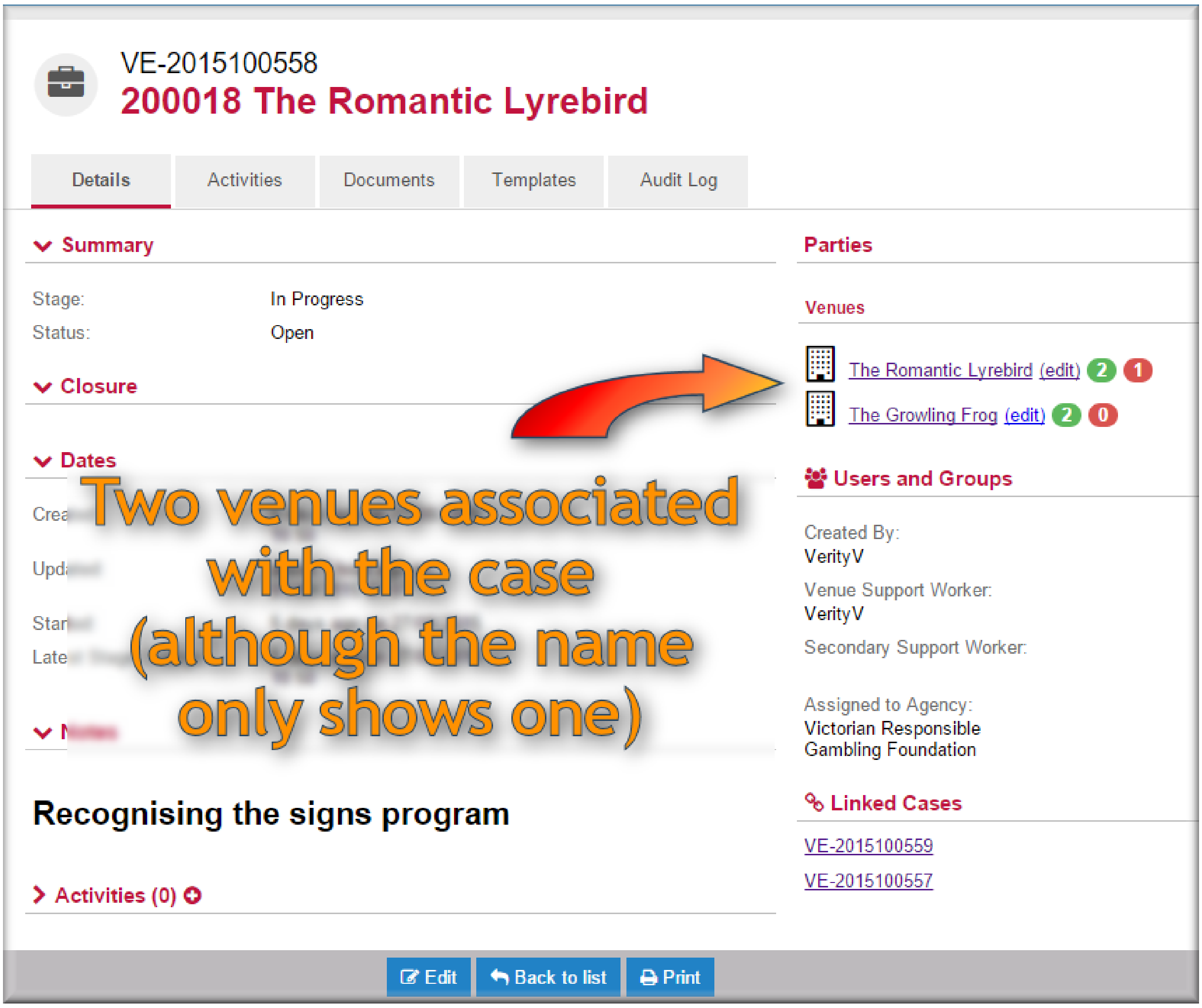
By Linking *the ad hoc case to the annual venue cases of each participating venue you create a handy link between the two making it easy for you to navigate between the two records.*

9 In the **Case Link** section, in the **Case Links** field, enter the *last* six digits of the annual venue case for one of the venues, then select the VE case number that displays.
The case number displays in the **Case Links** *field.*

10 Repeat **step 9** until each of the case number of each of the annual venue cases of each participating venue displays in the **Case Links** field.

11 Click **Save and Close**.

The new case is created and will now display in the **My Cases** *list of the assigned venue support worker.*



Non-plan based cases

Not all venue support worker's work relates to specific venues. For work relating to a catchment rather than a venue or venues you use the non-plan based case.

For each catchment you support you create an annual case against which you report your non-plan based activities for that catchment. The procedure for creating your non-plan based cases is the same as for your annual venue based cases except that you use with a dummy venue named *Venue Support Program (non-plan based)*.

4 Recording venue support worker activities

Work you do with venues or across your catchments are recorded in cases as activities. When you have delivered a training session at a venue you also record trainee feedback.

When recording activities you have the option of recording them after you have done the work, or of scheduling them beforehand and completing them when the activity is done. When you schedule activities you have the option of setting a reminder for yourself in *Gambler's Help Connect* that will display in your activities calendar view and will alert you twenty-four hours before the scheduled activity.

Each activity is defined by activity type and subtype. Where relevant, you can further define an activity by the training content to which it relates.

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

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

When you mark an activity as complete, a timesheet displays in which you enter your work and travel time for that activity.

Click to view a video demonstration of processing a venue support activity.

This section describes how you:

- Process an activity
- Schedule an activity and set a reminder
- Record training feedback.

Processing an activity

To create a new activity record:

- Click next to the **Activities** section on the **Details** tab of the case

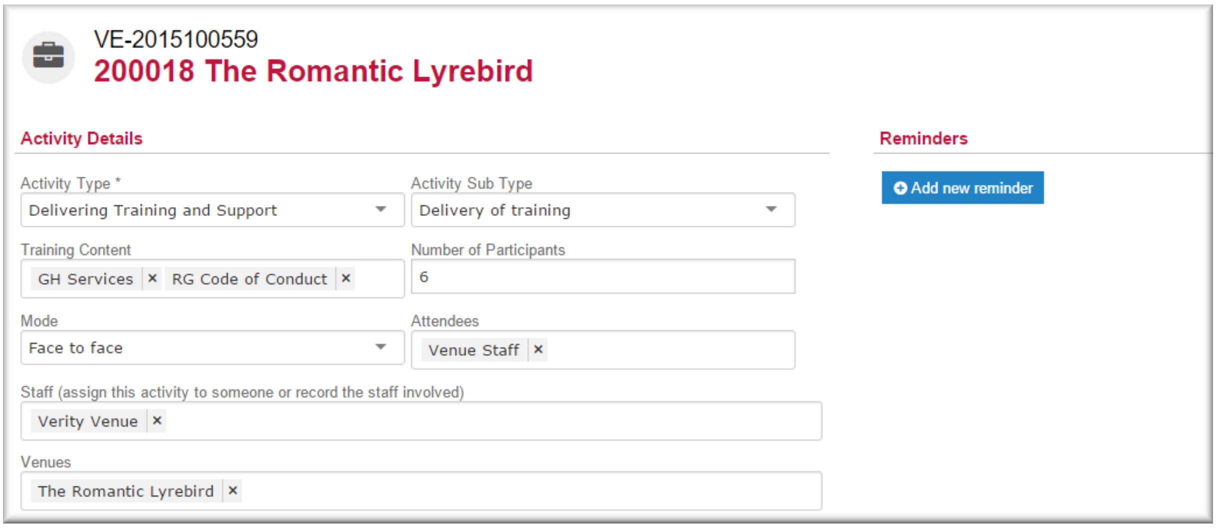
OR

- 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.



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

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

5 If applicable, in the **Training Content** field, select the training program or programs related to this activity.

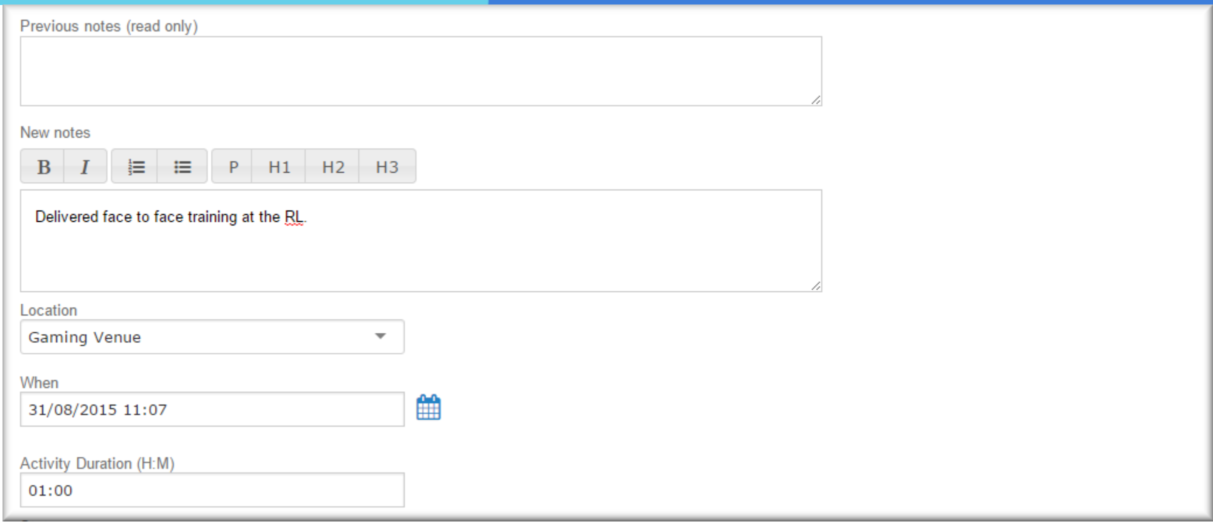
See [Activities](#) for a list of the activity types and sub types.

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

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

7 In the **Staff** field the name of the venue support workers for the case defaults. You can change this if required.

8 In the **Venues** field, the name of the venue defaults.



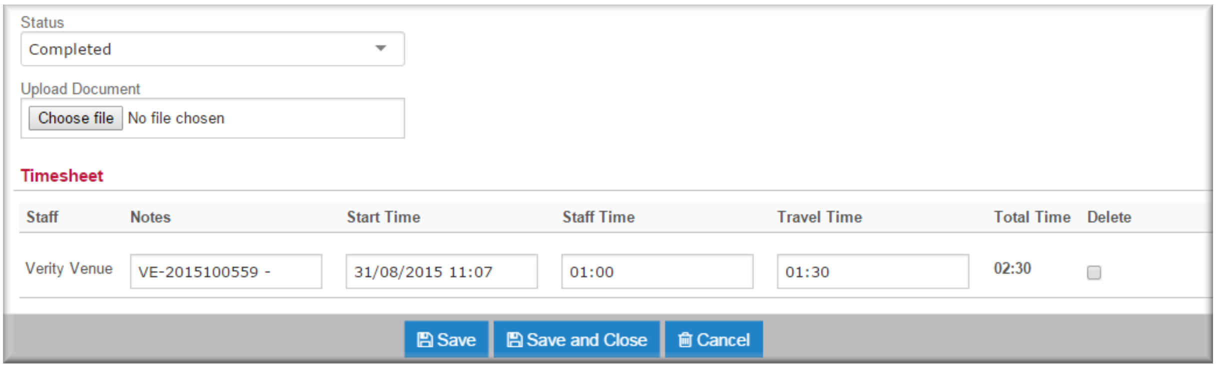
9 In the **New notes** field enter a note about activity.

> *When you save the activity, the notes you enter here will display in the **Previous Notes (read only)** field.*

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

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

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



13 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 **Staff time** field.*

14 In the **Timesheet** specify staff and travel time as applicable.

15 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

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.

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

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

5 If applicable, in the **Training Content** field, select the training program or programs related to this activity.

See Activities for a list of the activity types and sub types.

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

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

7 In the **Staff** field the name of the venue support worker for the case defaults. You can change this if required.

8 In the **Venues** field, the name of the venue defaults.

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

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

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

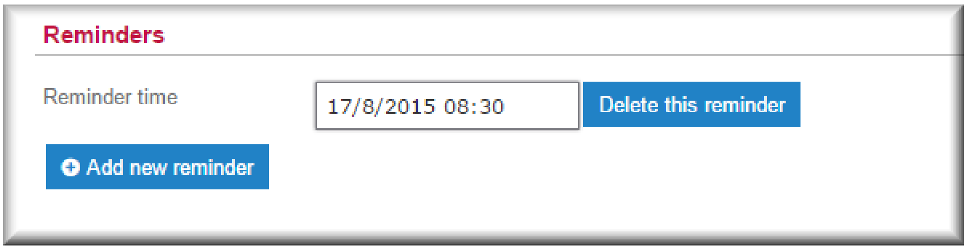
12 In the **Activity Duration (H:M)** field, select the planned duration of the activity.

13 Click Save and Close.
The activity is scheduled.

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. 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 [edit icon] 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

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

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

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

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

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

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

3 In the **New notes** field enter a progress 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 **Staff time** field.*

5 In the **Timesheet** specify staff 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 activities for cases with more than one venue

When you set up a case for a training program involving people from more than one venue, the activities you record respecting that program need to reflect this:

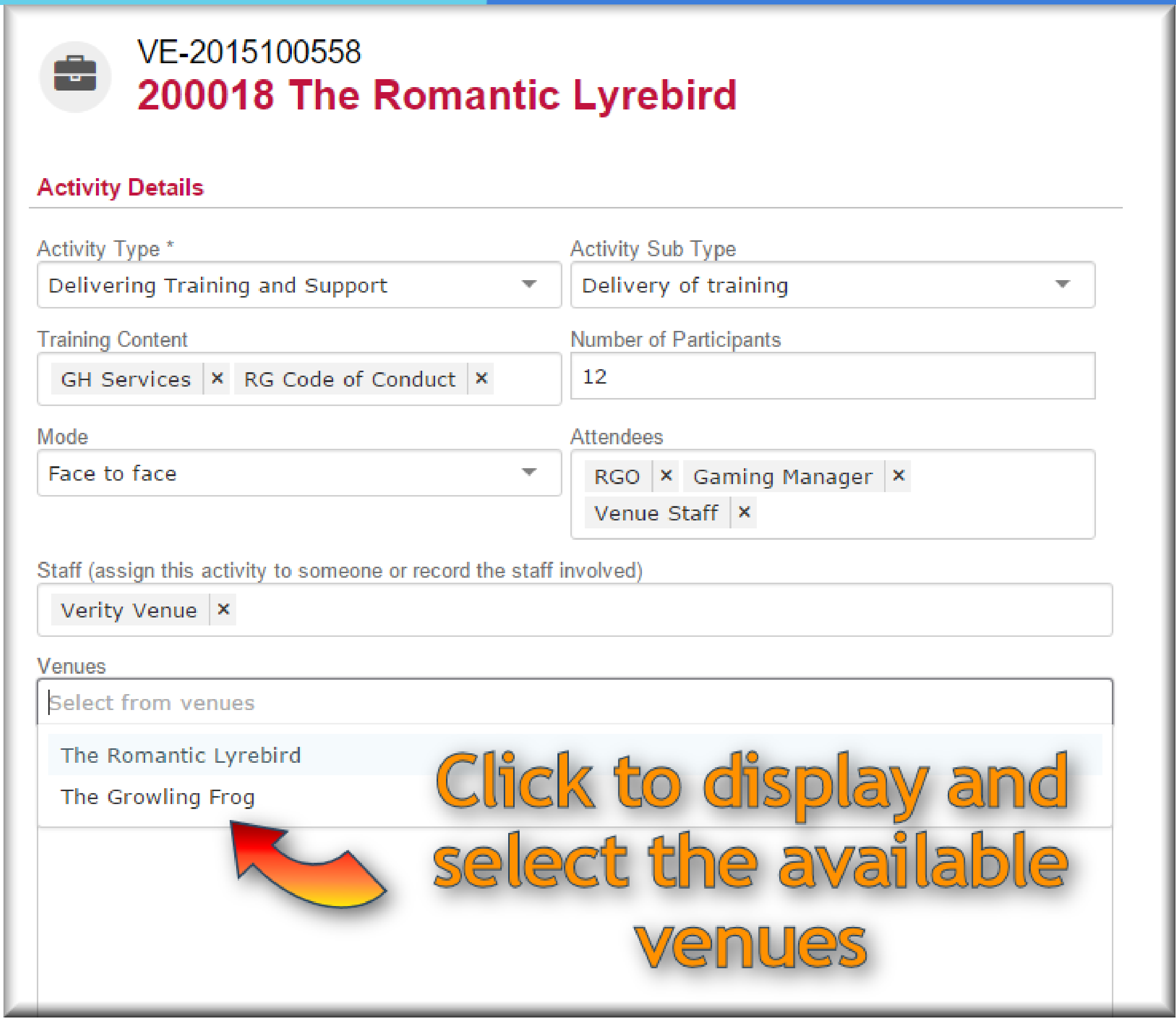
1 Open the *ad hoc* case in view mode.

2 In the **Activity** section click .
The new activity screen displays.

3 Completed the activity details fields as appropriate:

- **Activity type** and **Activity sub type**
- **Training content**
- **Number of participants**
- **Mode**
- **Attendees**
- **Staff**.

4 Click in the **Venues** field.
The list of venues associated with the case displays.



5 Select the venues for the activity.

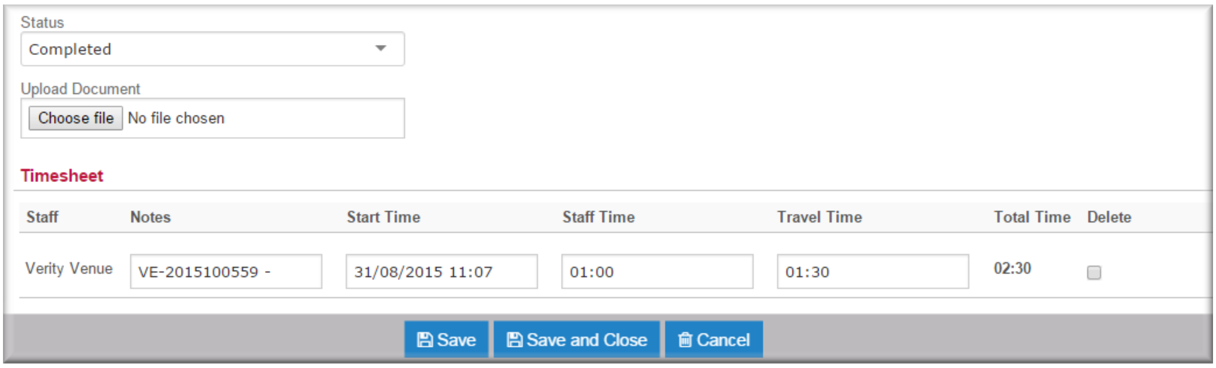
6 In the **New notes** field, enter your notes for the activity.

7 In the **Location** field, select the location of the activity.

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

9 In the **Activity Duration (H:M)** field select the duration.

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



11 Specify staff time and travel time as applicable.

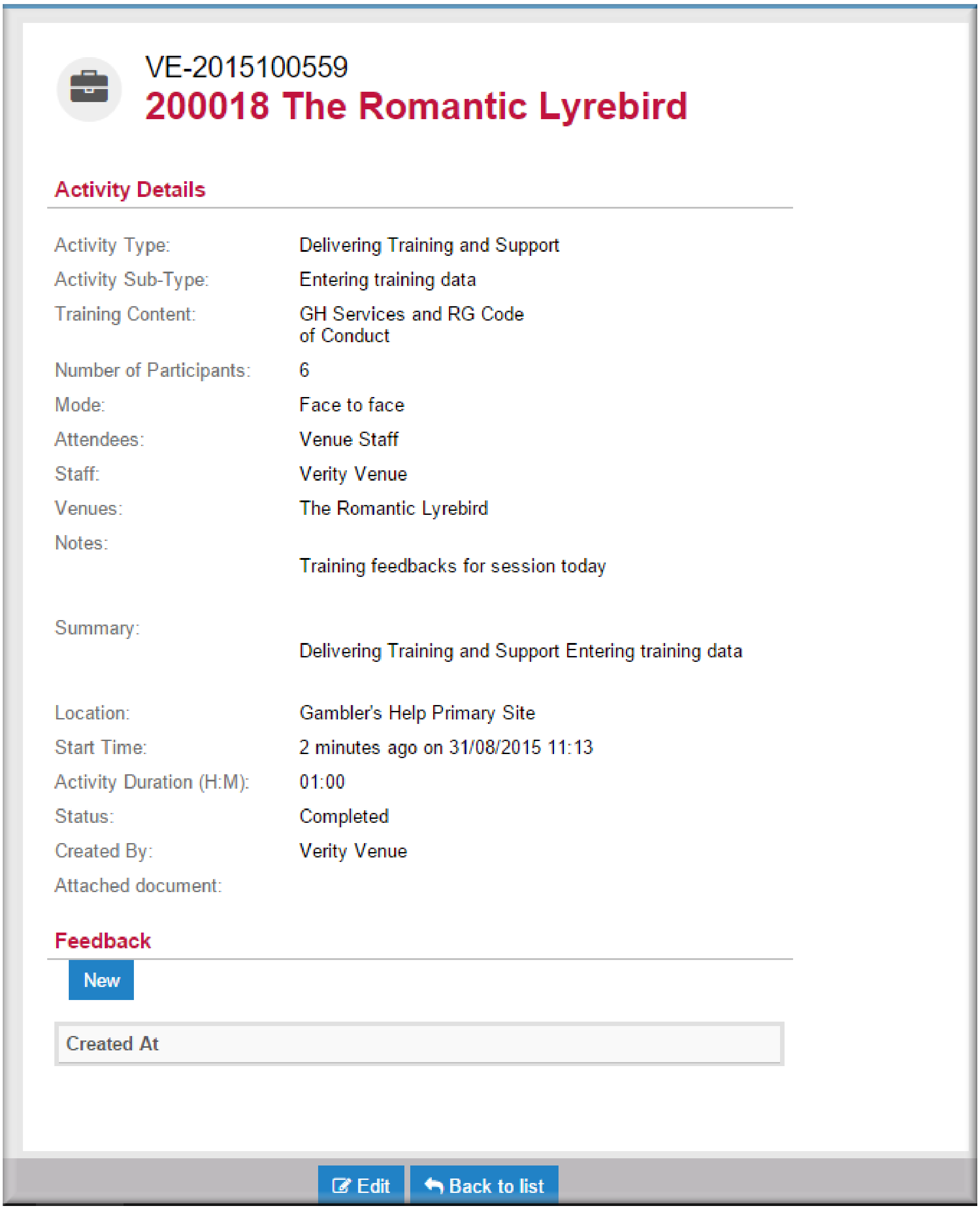
12 Click Save and Close.
You can now record training feedback from the participants.

In the event that your training program includes venues from more than one catchment you create separate ad hoc cases for each catchment and record the above activity against each case. You distribute the time across the activities according to your local agency policy.

Recording training feedback

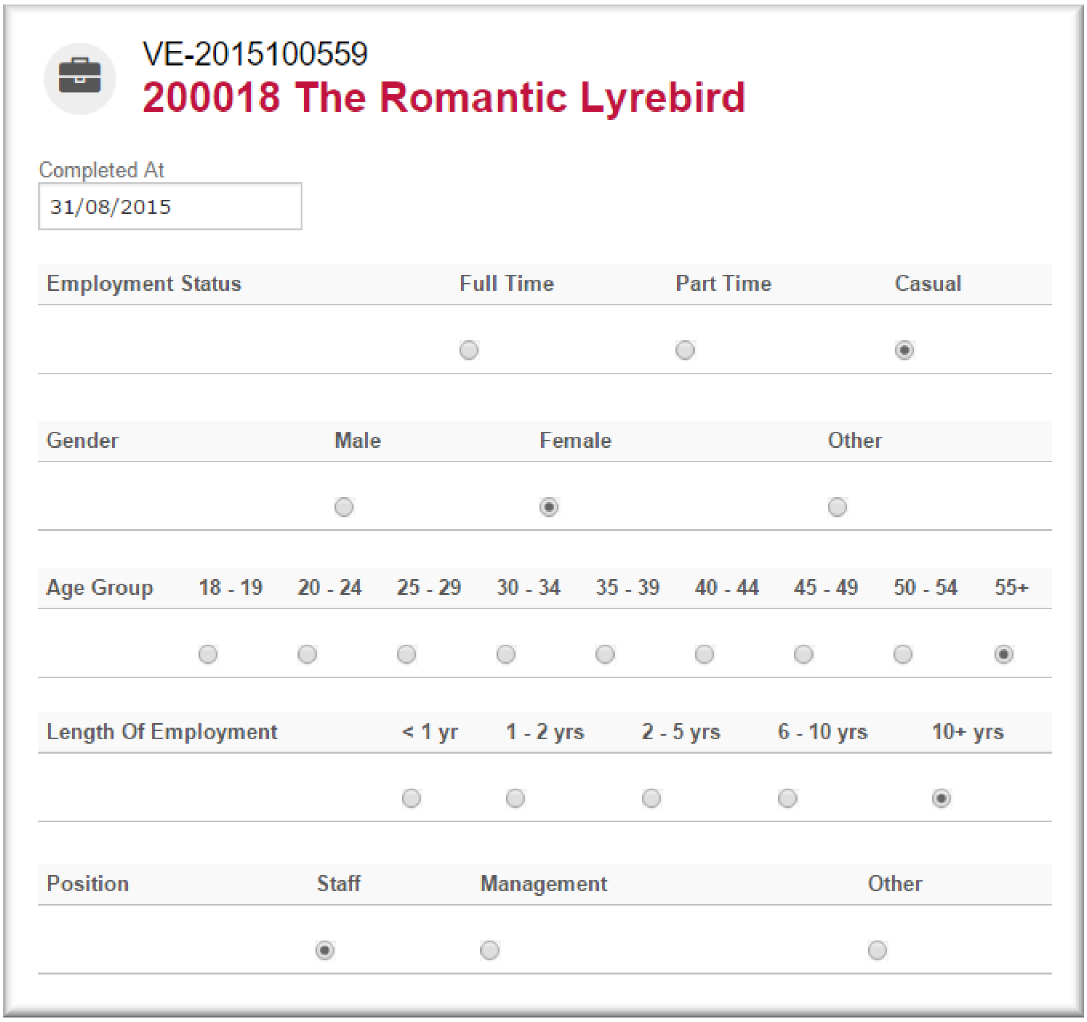
After you provide training to venue workers you need to record their feedback. You do this in the activity for the training session.

When you save and close an activity the record displays in view mode:



1 In the **Feedback** section, click New.
The feedback sheet displays. The completed at date defaults to today's date.

Illustrations of the feedback form are split into sections for easier viewing.



VE-2015100559

200018 The Romantic Lyrebird

Completed At

31/08/2015

Employment Status	Full Time	Part Time	Casual

Gender	Male	Female	Other

Age Group	18 - 19	20 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	55+

Length Of Employment	< 1 yr	1 - 2 yrs	2 - 5 yrs	6 - 10 yrs	10+ yrs

Position	Staff	Management	Other

2 Using the radio buttons enter the personal descriptor values.

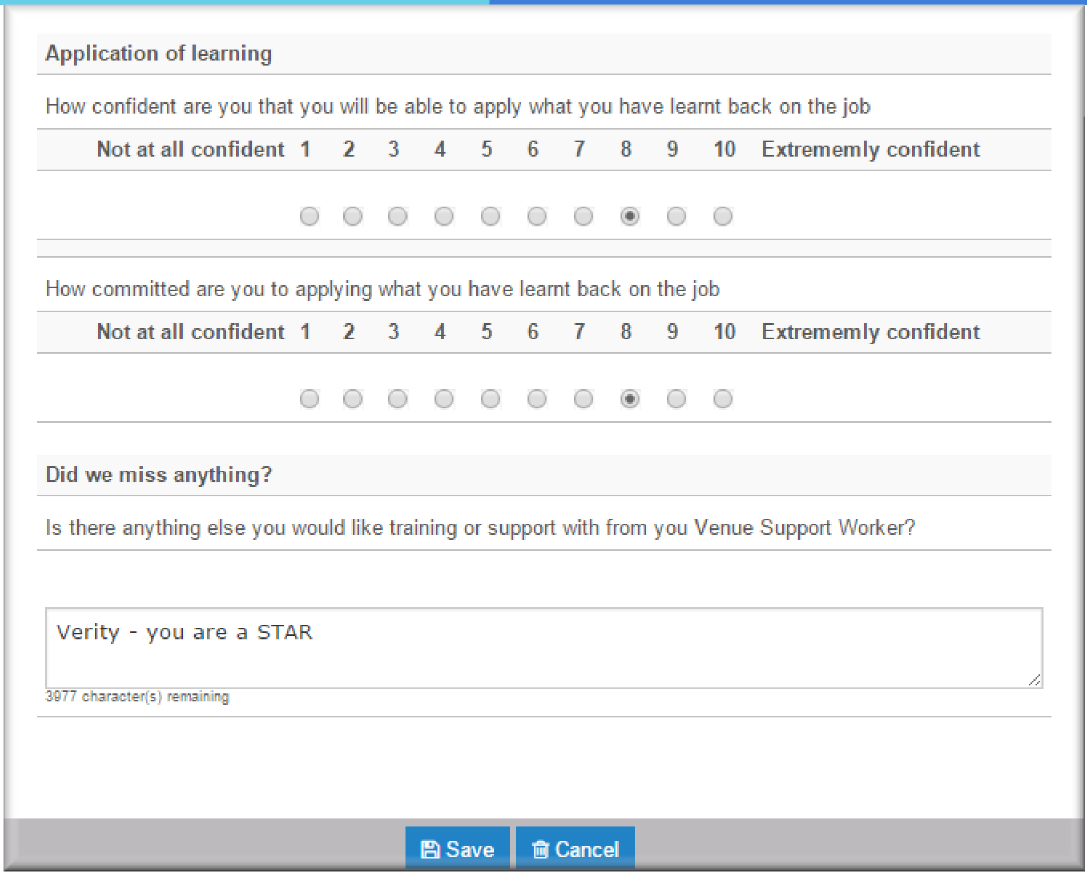
1 = Little or no understanding of the objective	2 = Basic understanding of the objective, but cannot demonstrate it	3 = Understand the objective and can demonstrate it with assistance	4 = Can demonstrate the objective without assistance	5 = Can demonstrate the objective and teach others to do it

Before Training						Objective	After Training					
1	2	3	4	5	N/A		1	2	3	4	5	N/A
○	○	◉	○	○	○	I understand and know how my venue is required to implement the Industry code of conduct	○	○	○	○	◉	○
○	○	◉	○	○	○	I can identify patron behaviours that may be associated with problem gambling	○	○	○	○	◉	○
○	○	◉	○	○	○	I can approach and respond appropriately to patrons displaying problem gambling behaviour	○	○	○	○	◉	○
○	○	◉	○	○	○	I know the Gambler's Help services available in my area, and could refer patrons to these services (including self-exclusion)	○	○	○	○	◉	○

Please indicate how much you agree with each statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Relevance					
The material received in the training will be helpful in my role	○	○	○	○	◉
I will be able to use what I have learnt	○	○	○	○	◉
Delivery					
The information was delivered well by the Venue Suppoprt worker	○	○	○	○	◉
The activities and exercises helped in my learning	○	○	○	○	◉
I was given an opportunity to practice what I had learnt	○	○	○	○	◉
Overall					
The training workshop met my expectations	○	○	○	○	◉
I would recommend this training workshop to my co-workers	○	○	○	○	◉

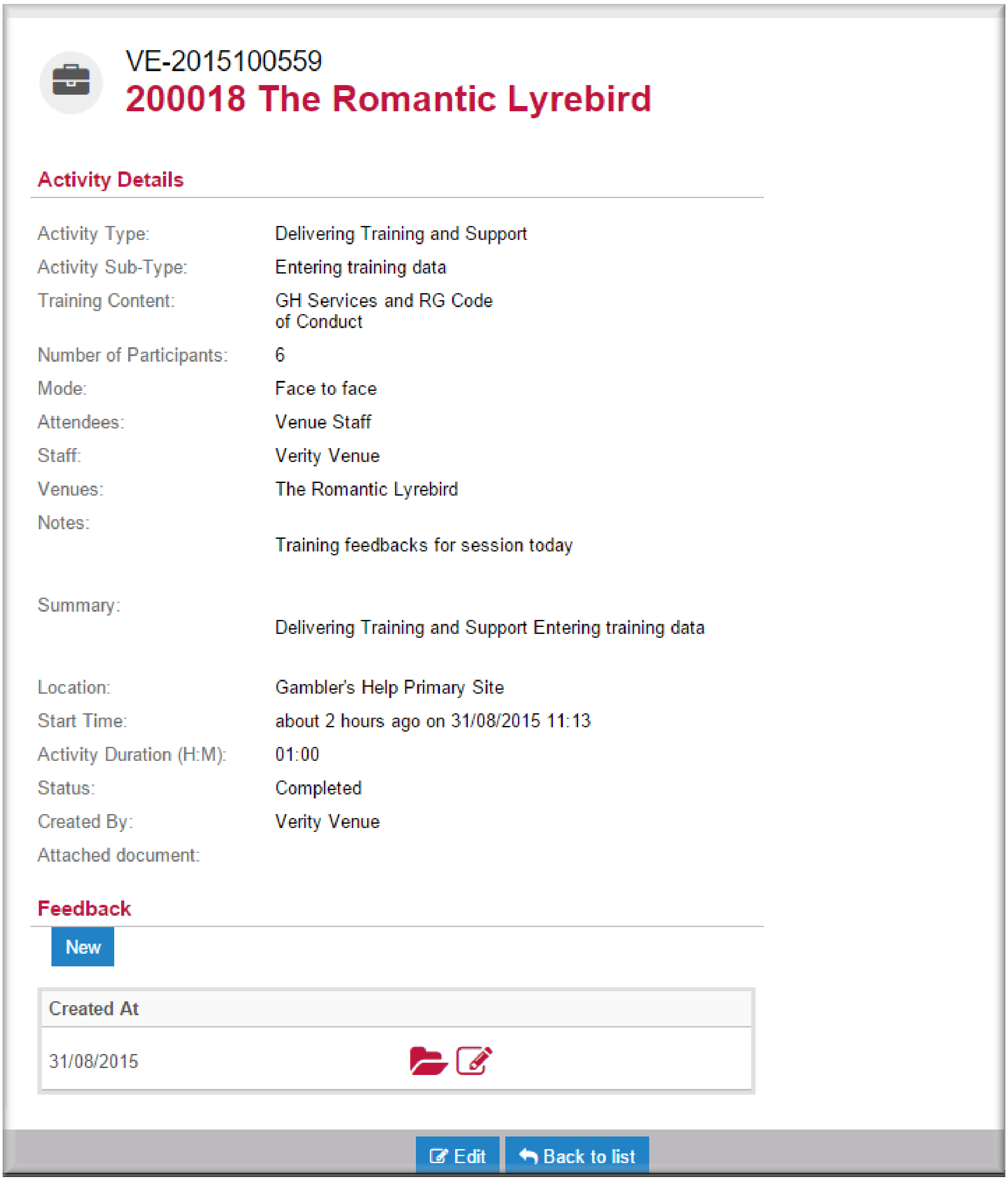
3 Using the radio buttons complete the feedback sections for:

- Objective
- Relevance
- Delivery
- Overall.



4 Complete the Application of learning section and add any additional comments as applicable.

5 Click Save.
The Activity displays in view mode with the feedback record displayed in a list.



VE-2015100559

200018 The Romantic Lyrebird

Activity Details

Activity Type:	Delivering Training and Support
Activity Sub-Type:	Entering training data
Training Content:	GH Services and RG Code of Conduct
Number of Participants:	6
Mode:	Face to face
Attendees:	Venue Staff
Staff:	Verity Venue
Venues:	The Romantic Lyrebird
Notes:	Training feedbacks for session today
Summary:	Delivering Training and Support Entering training data
Location:	Gambler's Help Primary Site
Start Time:	about 2 hours ago on 31/08/2015 11:13
Activity Duration (H:M):	01:00
Status:	Completed
Created By:	Verity Venue
Attached document:	

Feedback

New

Created At	
31/08/2015	

Edit Back to list

6 Repeat **steps 1-5** for each feedback sheet received from the training at the venue.

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, for example feedback sheets from training participants, into a single file, or alternatively attach the documents to the case instead via the **Documents** tab. 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.

1 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.*

2 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 cancel 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 completed activity

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

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

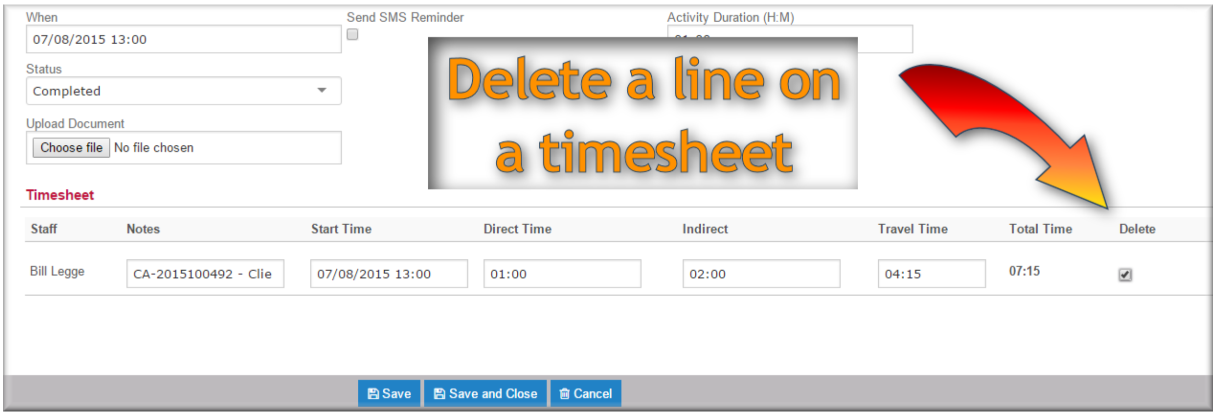
2 Select the **Activities** tab.

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.*

5 Managing cases

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

- Attaching documents to case records
- Closing cases.

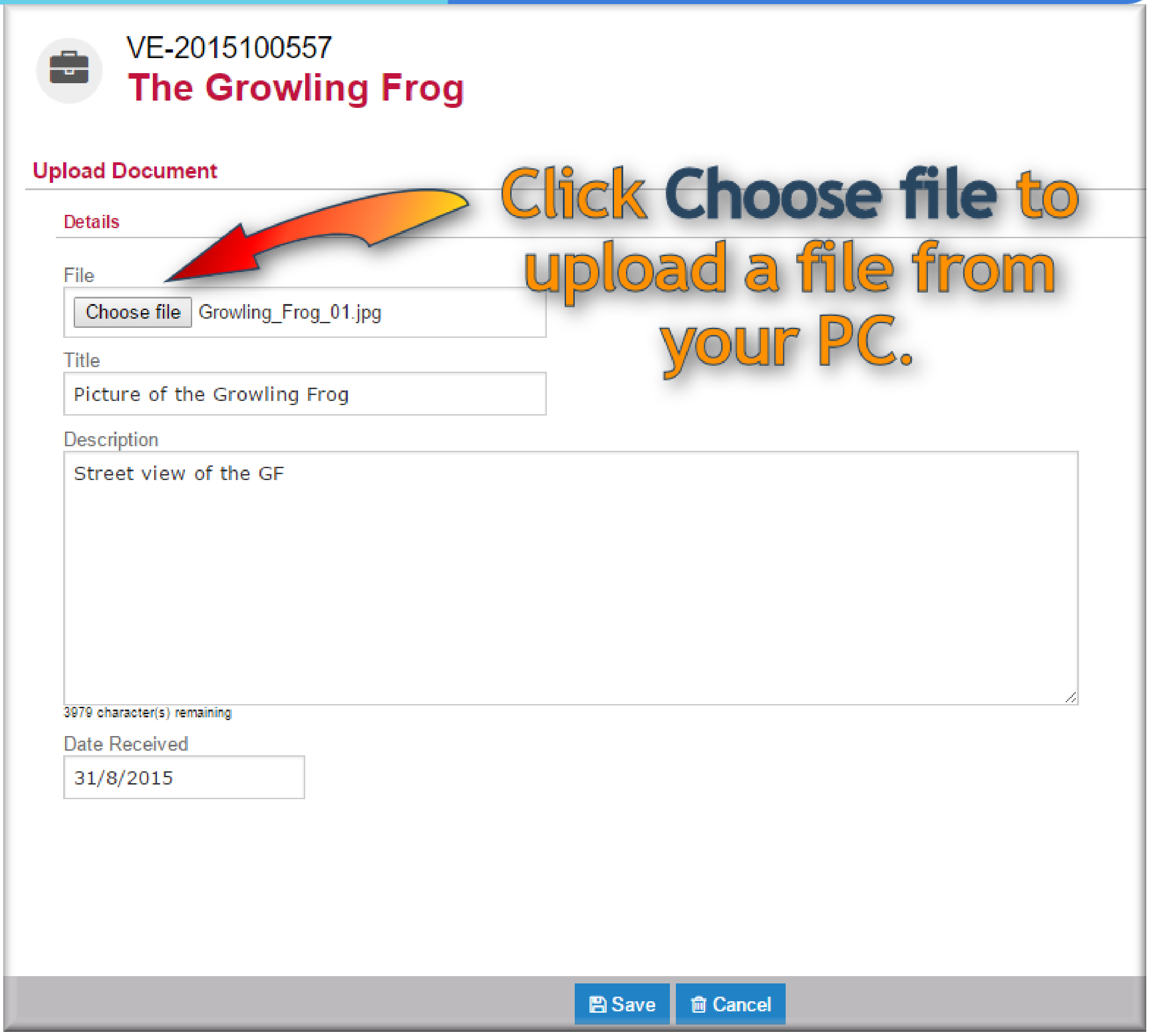
Attaching documents to venue support cases

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

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

To add a document to a case:

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



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

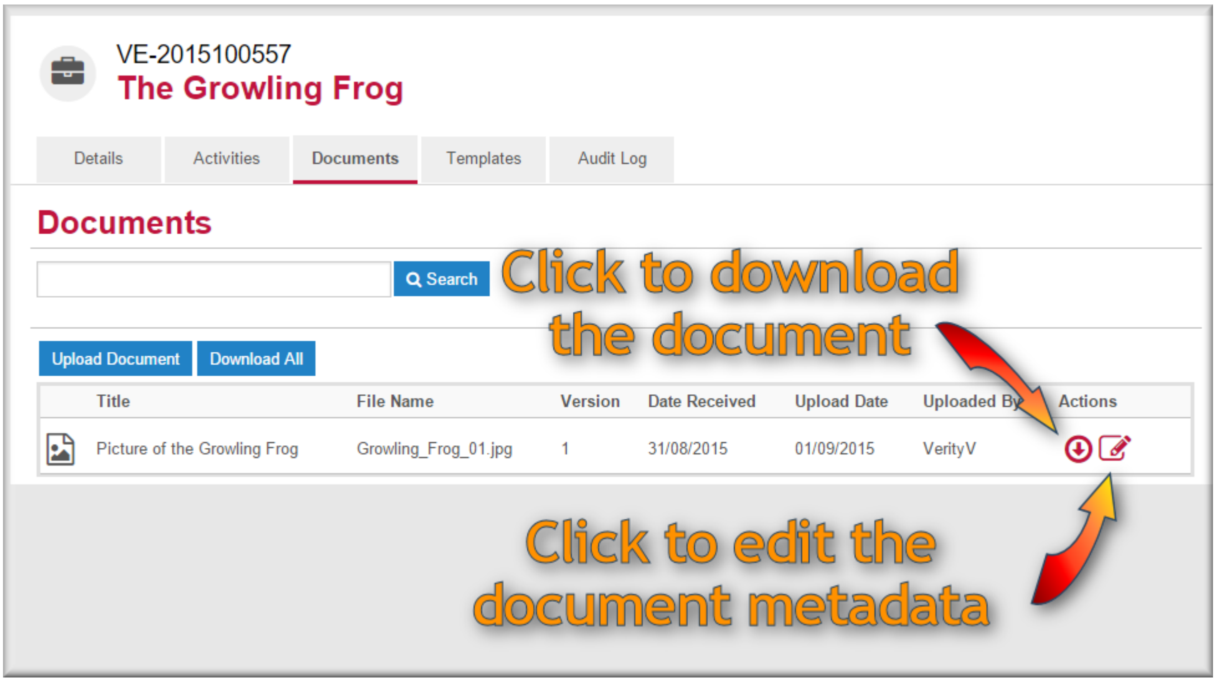
5 Locate the file you want to attach and click Open.
You return to the **Upload Document** *screen with the document listed in the* **File** field.

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

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

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

9 Click 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.

Closing venue support cases

There are three reasons why you might close a case:

- A venue closes or otherwise ceases to operate
- A project, for example an multi-venue training case, is complete
- A case was created in error.

To close a case:

1. Open the case you want to close in view mode.
2. Check that all necessary activities are recorded against the case and any scheduled activities are completed or cancelled.
3. Open the case you want to close and click Edit.
   The case opens in edit mode.
4. In the **Status** section, in the **Stage** field, select **Complete**.
5. In the **Closure** section in the **Closed date** field, select the closure date for the case.
6. In the **Closure Reason** field, select the reason for closing this case.
7. Click Save and Close.
   The case is closed. Add an administrative activity to the closed case to account for your time in organising the case closure if applicable.