DFV CONNECT
USER GUIDE

FASS Women and FASS Men

November 2023

Contents

General

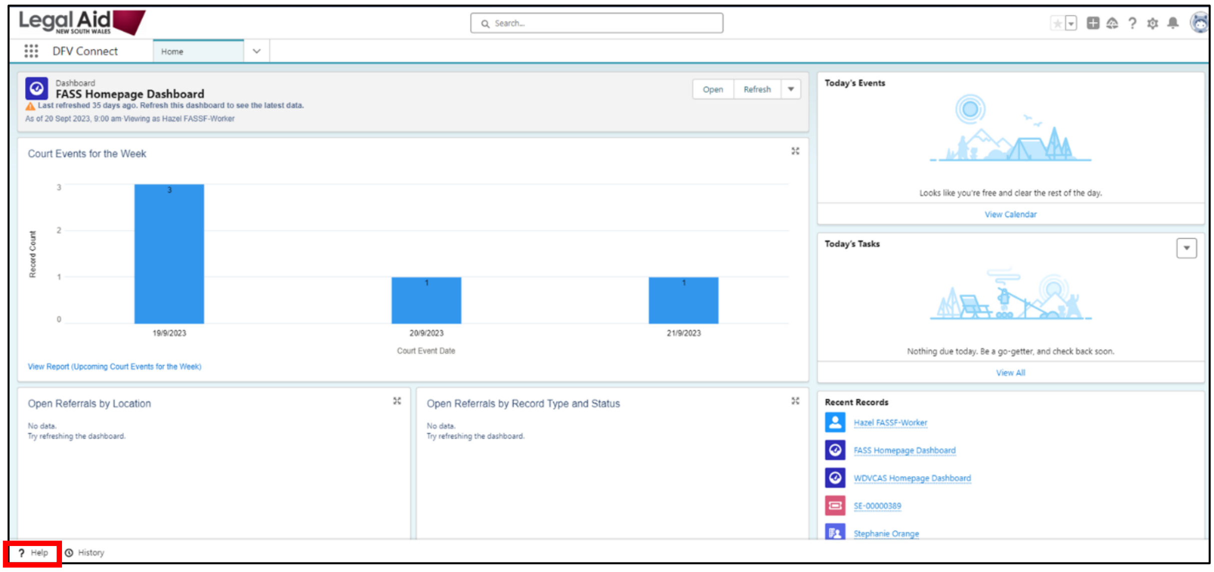
Getting Help

DFV Connect Support website

The DFV Connect Support website contains help resources, support material and information about DFV Connect. On this website, you will find:

- DFV Connect User Guides (for WDVCAS and FASS)
- Quick Reference Guides (QRGs)
- Recorded Training Sessions
- Access and Delete Request Form
- Privacy related information

To access the DFV Connect Support website, click on the **Help** link located in the bottom left-hand corner of the DFV Connect screen.



Support Team

If you need to speak with someone regarding a DFV Connect issue, you can also contact the WDVCAP (Women s Domestic Violence Court Advocacy Program) team:

Type of issue	Legal Aid NSW Team	Contact
Policy or procedure **related questions** **Technical issue**	**WDVCAP Unit** Mon – Fri 08:00 – 17:00	wdvcap@legalaid.nsw.gov.au

Abbreviations

ADVO	Apprehended Domestic Violence Order
DCJ	Department of Communities & Justice
DFV	Domestic & Family Violence
DVO	Domestic Violence Officer
DVU	Domestic Violence Unit
DVSAT	Domestic Violence Safety Assessment Tool
EIU	Early Intervention Unit
FamAC	Family Law Assistance for Aboriginal Communities
FASS	Family Advocacy and Support Service
FCFCOA	Federal Circuit and Family Court of Australia
LGBTIQ	Lesbian, Gay, Bisexual, Transgender, Intersex and Queer
LSS	Local Support Service
SAM	Safety Action Meeting
SMS	Short Message Service (Text Message)
WDVCAP	Women's Domestic Violence Court Advocacy Program
WDVCAS	Women's Domestic Violence Court Advocacy Service

Terminology

Term	Meaning
DFV Connect	DFV Connect is an online client and case management system for WDVCAS and FASS social support staff to process referrals and manage their client caseload.
Accounts	Accounts in DFV Connect is the record type where primary information is stored about clients and external service providers. In DFV Connect, there are two types of accounts: 1. Person Account 2. External Service Provider Accounts
Cases	Case records in DFV Connect are used to record services and support for clients. For FASS staff, there is only case coordination cases.

External Referral	An external referral is a service event to record and/or make referrals to external service providers on behalf of a client and/or dependent child.
Funding Program	DFV Connect will be used by WDVCAS, FASS Women and FASS Men staff. To ensure separation of information in DFV Connect, the information is separated by funding programs. As a FASS user, the funding program will always display as FASS Women or FASS Men.
Internal Referral	An internal referral is an in-system referral made or received by DFV Connect users. For example, a FASS Women user may make a referral to a WDVCAS service area to assist a client with their ADVO (Apprehended Domestic Violence Order). FASS Men will not have access to the internal referral function until LSSs (Local Support Services) are onboarded.
List Views	List views contain high level information about components in DFV Connect. Users can access certain list views depending on the component (e.g., Account, Referral or Case) selected.
Service Area	Service area refers to the catchment area within each funding program. For FASS Women Social Support staff, this is your WDVCAS catchment area. For FASS Men, this is your service provider.
Location	Within a FASS Service Area, there will be one or more service locations. These are your FCFCOA locations. For example, Western Women's FASS will have one service and 3 service locations (for the Dubbo, Orange, and Broken Hill registries).
Other Party	Person of Interest/Other Party in referral received.
Referrals	Users in DFV Connect can receive and create referrals. Types of referrals received: • Manual • Internal Types of referrals made for a client: • External • Internal (currently FASS Women only)
Related Referral	Referral that relates to the **same incident or court matter** as another referral received.
Service Provider	External service provider
Record	Record is a system term relating to the type of component or record in the system. For example, account records, referral records, case records.

Assessment	In DFV Connect, the Domestic Violence Safety Assessment Tool (DVSAT) is recorded as an 'Assessment.'

Introduction

The FASS DFV Connect User Guide - outlines main functions and steps on how to use the system. All FASS Staff must be acquainted with and comply with this user guide.

The DFV Connect User Guide – FASSs (Family Advocacy and Support Service) should be read in conjunction with the FASS Policy and Procedure Manual and FASS Service Agreement.

DFV Connect is an online client and case management system owned and maintained by Legal Aid NSW. Legal Aid NSW is committed to ensuring all users accessing the DFV Connect comply with relevant legislation.

Document purpose

The purpose of this user guide is to detail the DFV Connect system functionality and key features and guide FASS staff through workflow and system processes.

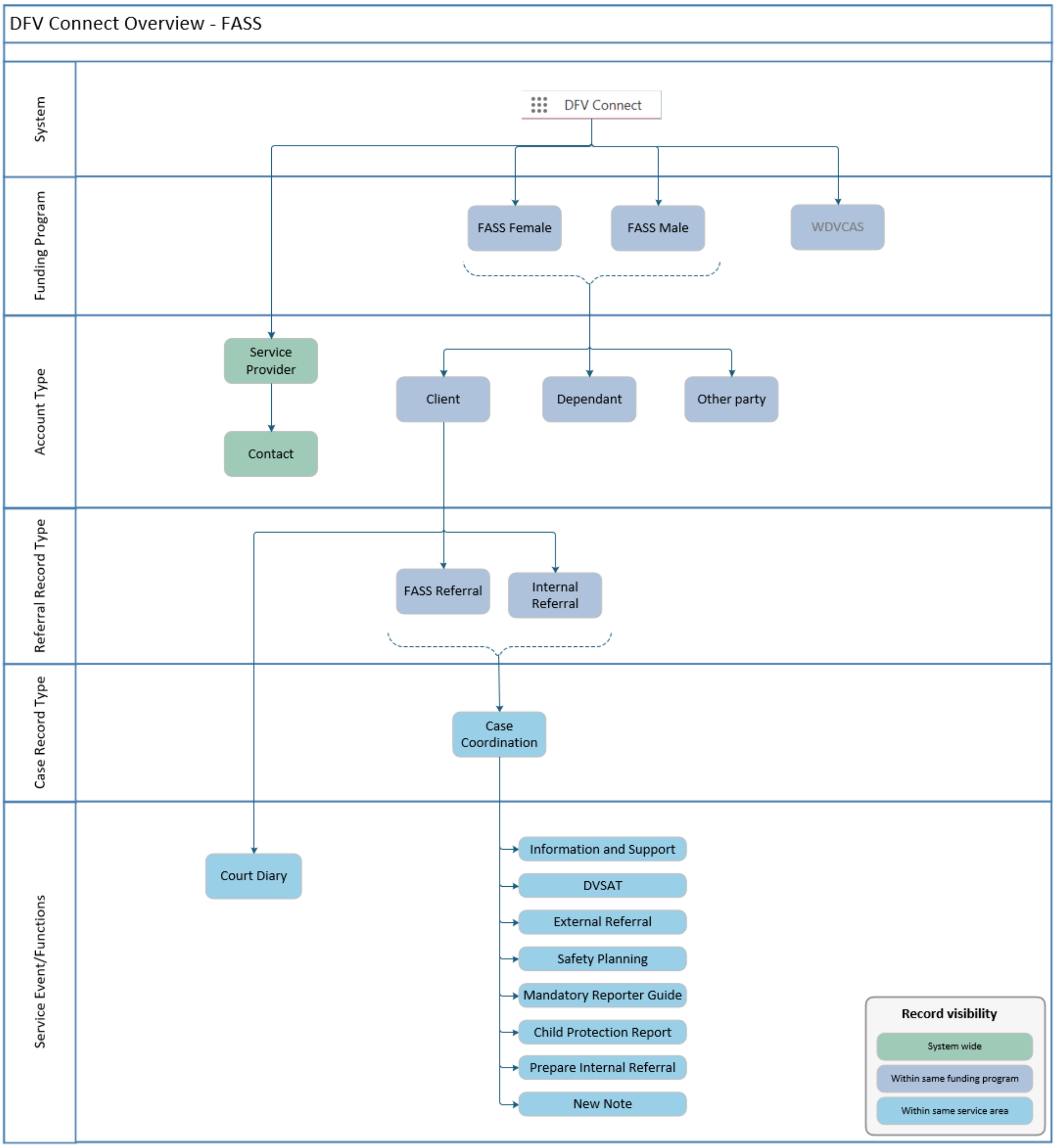
This document aims to assist FASS staff to be able to use the system efficiently and ensure consistent storage information and data.

Information should be recorded at the time of contact or as soon as possible after a service is provided.

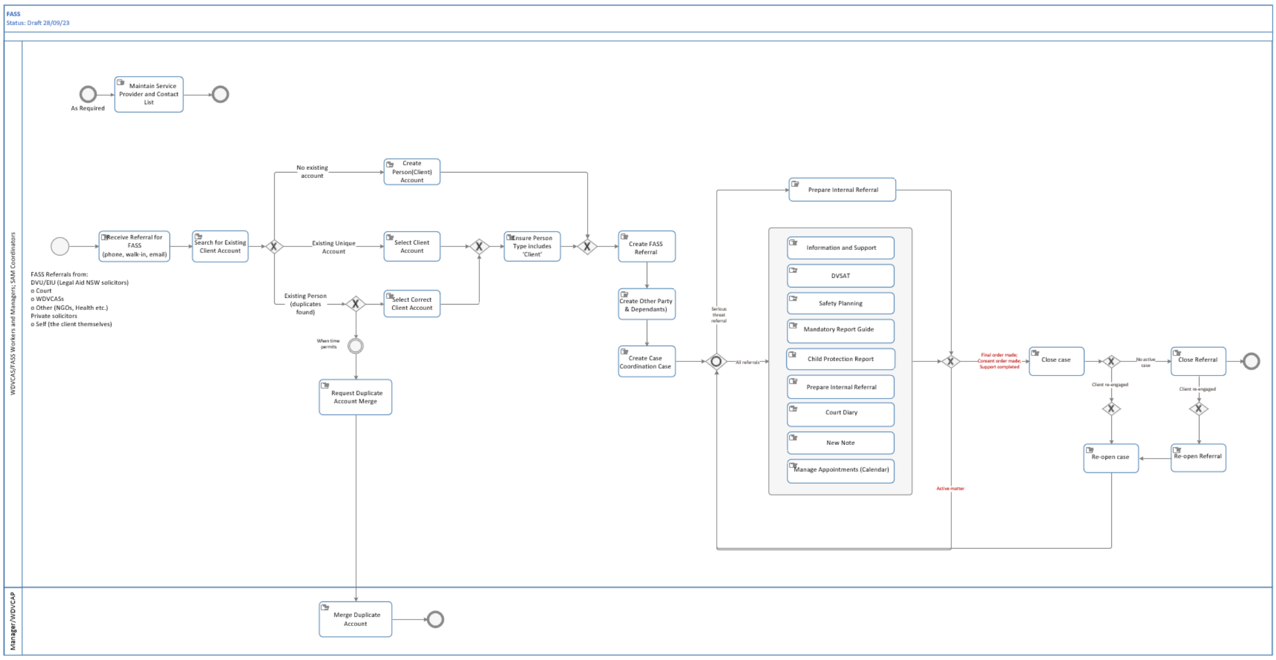
Audience

This user guide has been developed for all FASS Social Support staff using DFV Connect.

System Overview



DFV Connect Process



Visibility

See system overview which includes visibility overview of components in DFV Connect.

Privacy

All users must be aware of their obligations regarding information sharing and privacy, and should only be accessing or using client personal information in DFV Connect:

- to provide WDVCAS or FASS services (i.e. the reason the information was collected) or for another directly related reason, such as referral checks
- where required or permitted by law
- where necessary to prevent or lessen a serious and imminent threat to the life or health of a person, or
- where another exemption under the privacy legislation applies.

Workers should not use or access client personal information on DFV Connect:

- for any reason not listed above unless they have client consent to do so
- to gossip, out of curiosity (e.g. because a case is in the media) or for personal benefit
- as a favour for another person, or
- in a way that is not consistent with the impartial exercise of their FASS functions.

Suspected privacy breaches must be reported to Legal Aid NSW immediately, per clause 18.2(a) of the standard terms and in accordance with privacy roles and responsibilities.

Further information about privacy compliance can be found in the FASS Policy and Procedure Manual and FASS Service Agreement.

FASS social support workers should not be entering identifiable FASS client information into other systems.

User Account Set-up, Login and Navigation

Access and delete request

FASS Managers can access and download the Access and Delete request form on the DFV Connect Support website to request system access for new starters or changes for existing staff. The completed form is to be submitted to the WDVCAP Unit at wdvcap@legalaid.nsw.gov.au.

The following information is to be provided:

- First and Last Name
- Email Address
- Mobile Number
- Role (Manager, Assistant Manager, FASS Social Support Worker)

All users must comply and adhere to the conditions of use contained in the DFV Connect User Agreement.

Managers are also responsible for informing the WDVCAP about staff movements and ensuring all staff attend available training sessions.

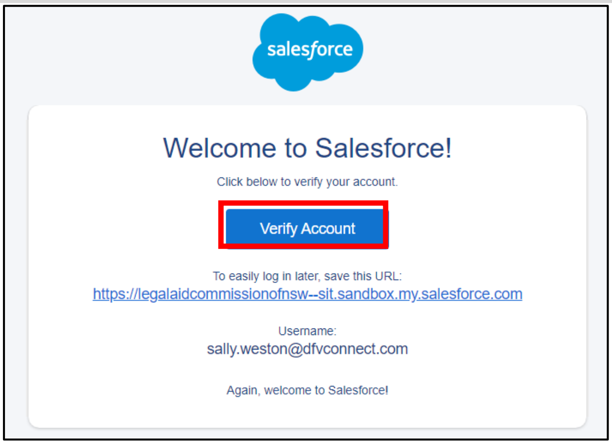
User account set-up

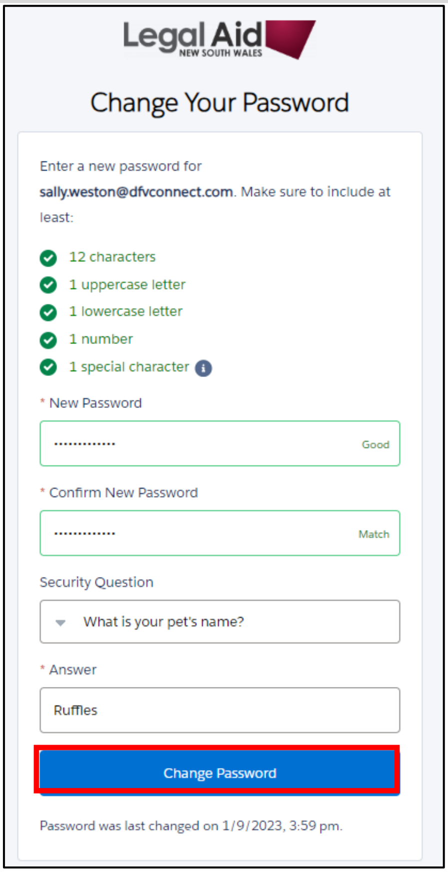
Notes

- You will receive an email from support@emea.salesforce.com when your account has been set up by the business admin team.
- The first time you log in, you will be required to reset your password.

Process steps

Step	Description
1.	In your work inbox, open the email received from support@emea.salesforce.com and click on **Verify Account**

Step	Description
	
2.	The **Change Your Password** screen will display. • Enter a **New Password** making sure to meet the security criteria (12 characters, uppercase and lowercase, number, special character). • Enter your password again in the **Confirm New Password** field. • Select a **Security Question.** • Type in your **Answer.** • Click **Change Password.**

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>3.</td><td>DFV Connect will open and the Home screen will display.</td></tr>
<tr><td>NOTE</td><td>Tip: Save this URL as a favourite or create a shortcut on your desktop by clicking on the ⋮ icon in the upper-right corner of the screen, selecting:
More tools
Create shortcut,
Enter the shortcut name
Click Create.</td></tr>
</table>

Multi-factor authentication (MFA)

The second time you log in, you will be asked to establish a multi-factor authentication method. MFA reduces the risk of unauthorised access and is important feature for DFV Connect - as the system contains sensitive and private information about our clients.

Each time you log in after this first instance, you will need to enter:

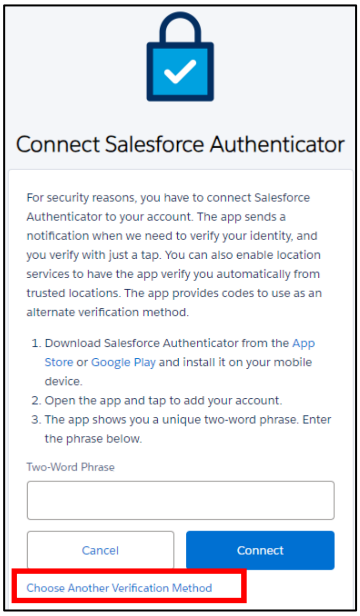
- Your password
- Confirmation of your identity

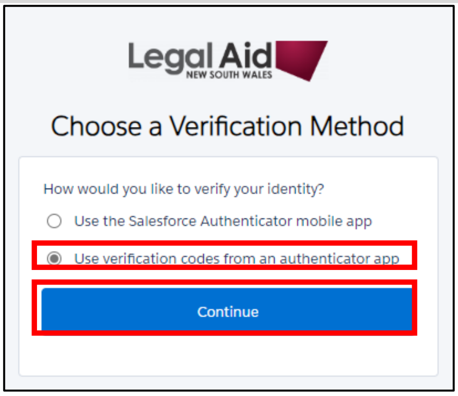
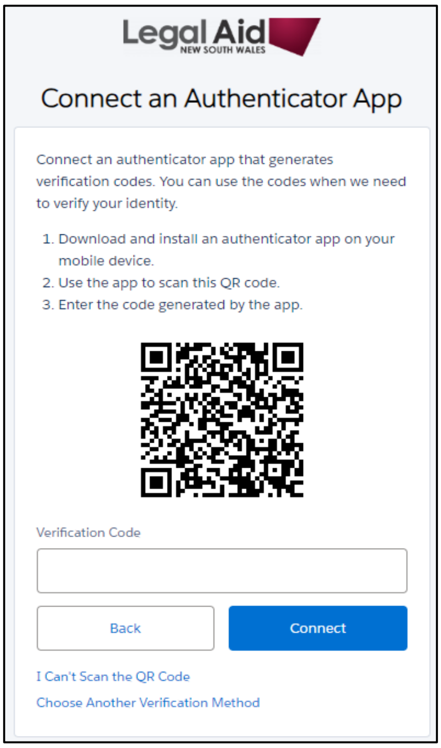
You will need to have the Microsoft Authenticator application installed on your phone to set up multi-factor authentication.

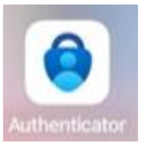
You can download the app from the App Store (for iOS) or Google Play Store (for Android) by searching for 'Microsoft Authenticator' and following the installation instructions.

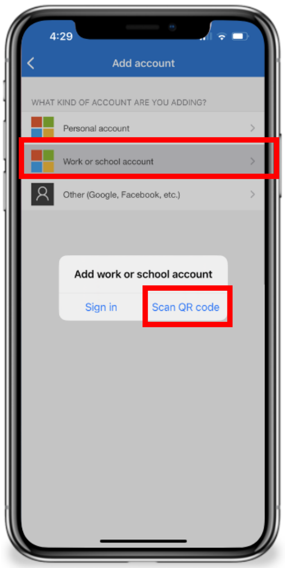
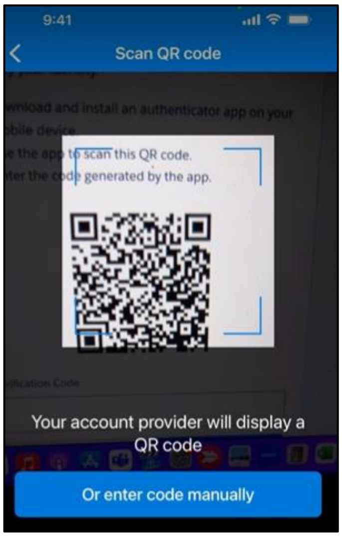
Process steps

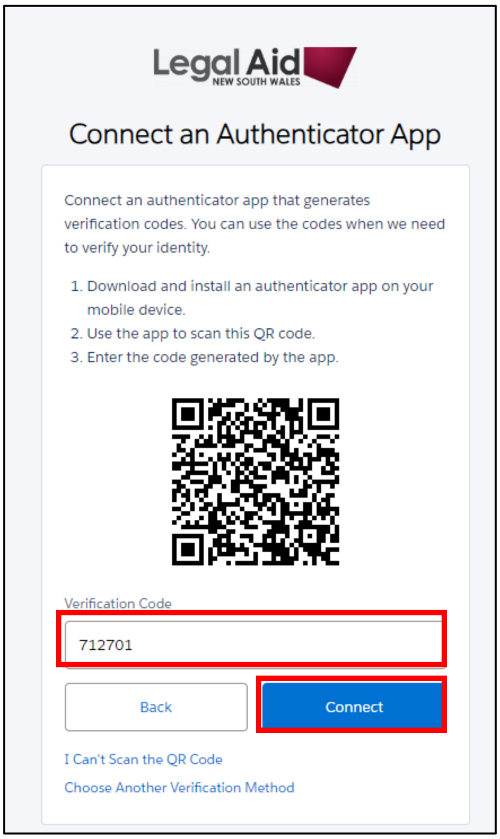
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>Open Google Chrome, the optimum browser to use for this system and enter the URL https://legalaidcommissionofnsw.my.salesforce.com/

or click on your saved shortcut to open the application – see the Tip above.</td></tr>
<tr><td>2.</td><td>The Connect Salesforce Authenticator screen will display. Click Choose Another Verification Method.

</td></tr>
<tr><td>4.</td><td>The Choose a Verification Method screen will display. Select Use verification codes from an authenticator app. Click Continue .</td></tr>
</table>

Step	Description
	
5.	The *Connect an Authenticator App* screen will display. 
6.	If you have not already, go to the **App store** on your **mobile phone**, and download **Microsoft Authenticator.**

Step	Description
	 
7.	**On your mobile phone**, open the Authenticator App and click + to Add an account. 
8.	The Add account screen will display. Select **Work or school account.** Select **Scan QR Code.**

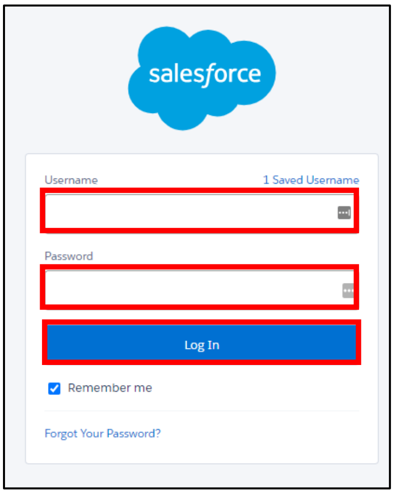
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>9.</td><td>Your mobile phone camera will open.
Hold the phone towards your DFV Connect screen, aligning the frame with the QR Code.

</td></tr>
<tr><td>10.</td><td>If a pop-up displays, click Continue. A verification code will display.</td></tr>
</table>

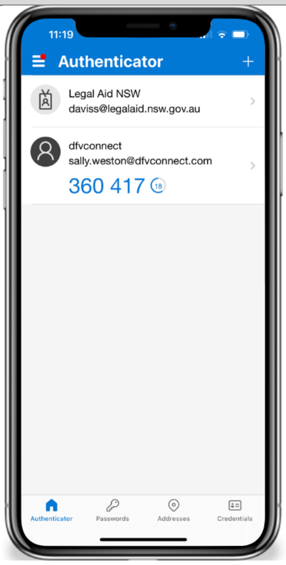
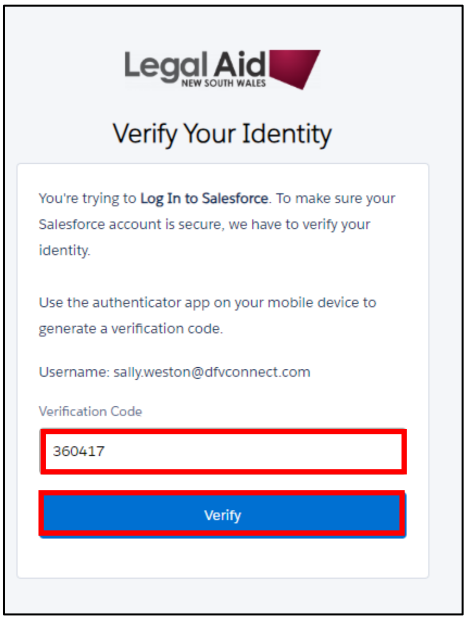
Step	Description
	
11.	Enter the code generated by the app into the Verification Code field box on your computer. Click **Connect.** 
12.	The system will open and the *Home* screen or your last visited page will display.

Log in

Google Chrome is the optimum browser for using the system.

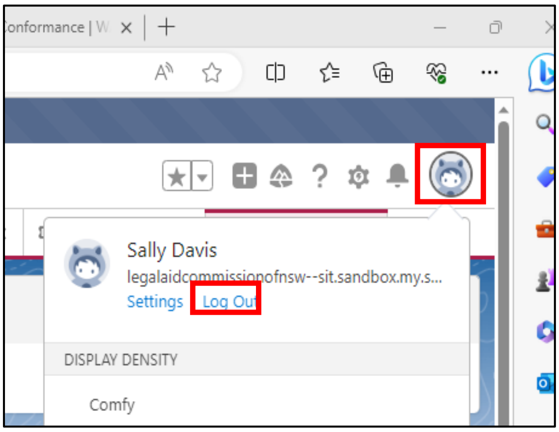
Process steps

Step	Description
1.	In Google chrome, enter the URL: • https://legalaidcommissionofnsw.my.salesforce.com/ It is recommended you save a shortcut to this URL to easily access DFV Connect.
2.	The *Salesforce log in* page will display. Enter your **Username, Password** and select **Log In.** 
3.	The *Verify your Identity* screen will display. On your mobile phone, open the **Microsoft Authenticator App** A verification code will be displayed.

Step	Description
	
4.	Back on the *Verify your Identity* screen, enter the **Verification Code.** Click **Verify.** 
5.	The system will open and the *Home* screen or your last visited page will display.

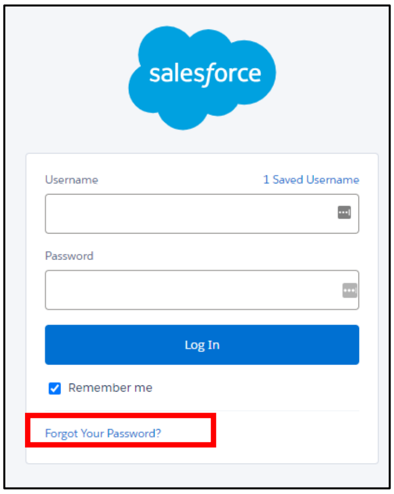
Log out

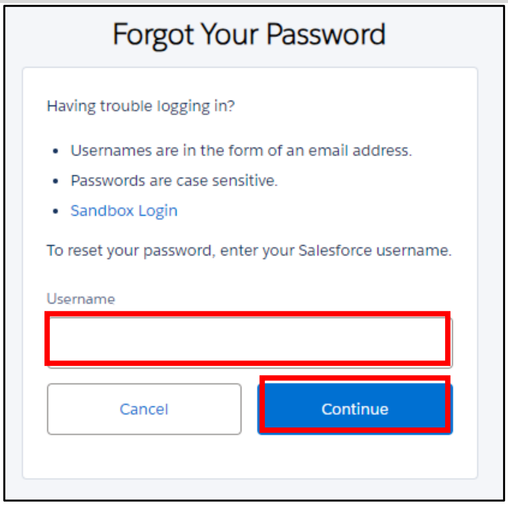
Process steps

Step	Description
1.	At the top of your screen, click your **profile icon.** Click **Log Out.** 

Forgot password

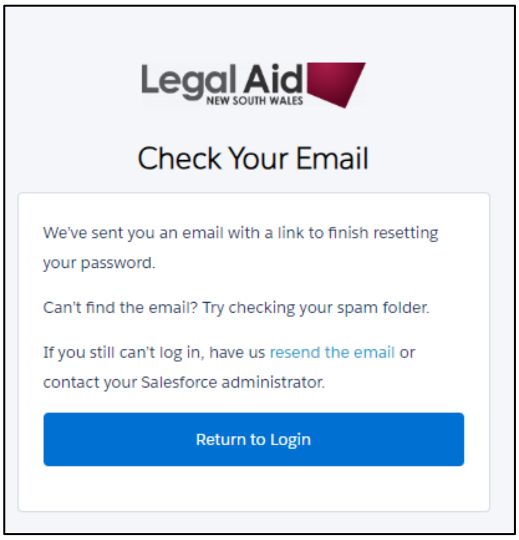
Process steps

Step	Description
1.	From the Log In screen. Click **Forgot Your Password?** 
2.	The *Forgot Your Password* screen will display. Enter your **Username.** Click **Continue**

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>


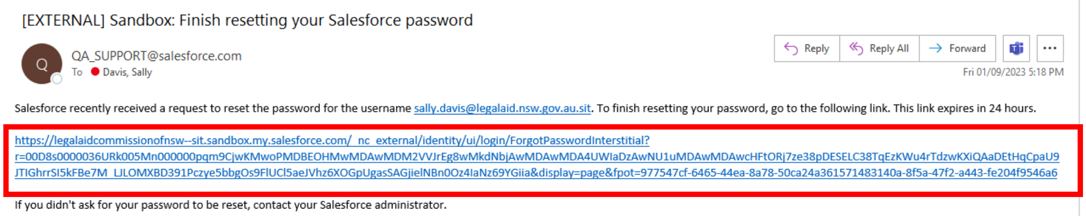
</td></tr>
<tr><td></td><td>
Your username is separate to your Email Address, so on clicking Continue, and email will be sent to your email on record.

Note: Password cannot be reset by you more than once in a 24-hour period.
</td></tr>
<tr><td>3.</td><td>
The *Check your Email* screen will display

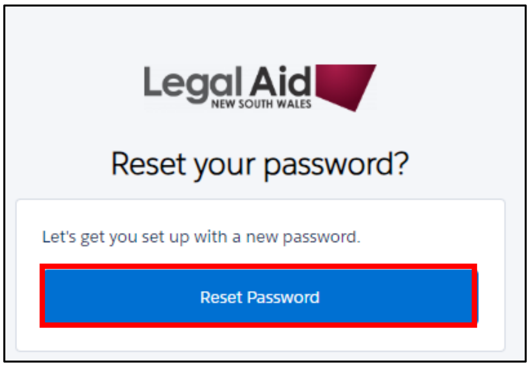
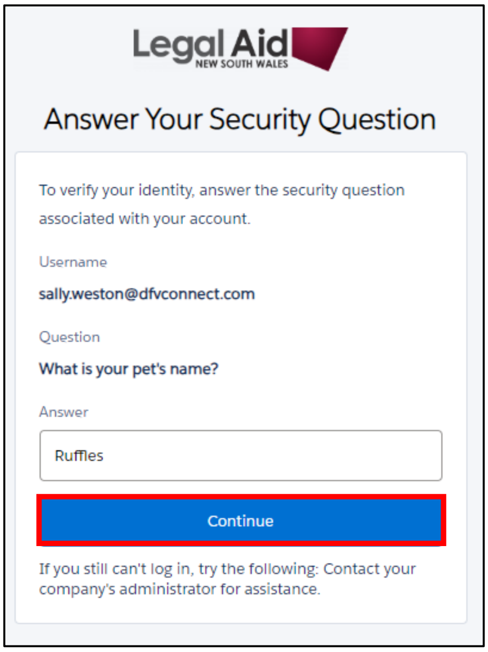


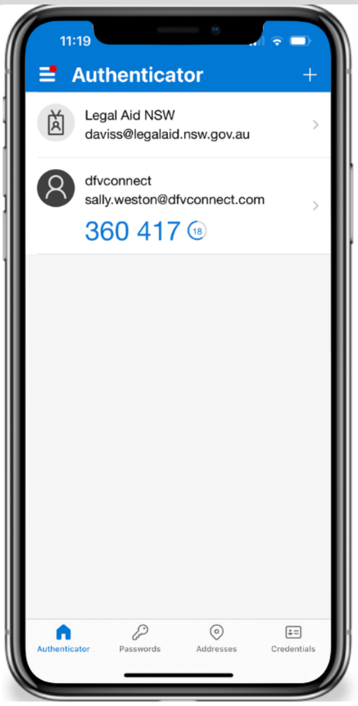
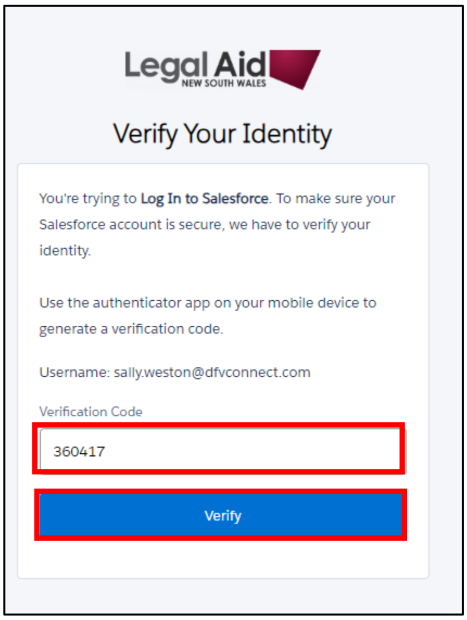
</td></tr>
<tr><td>4.</td><td>
Check your inbox and find an email from @salesforce.com

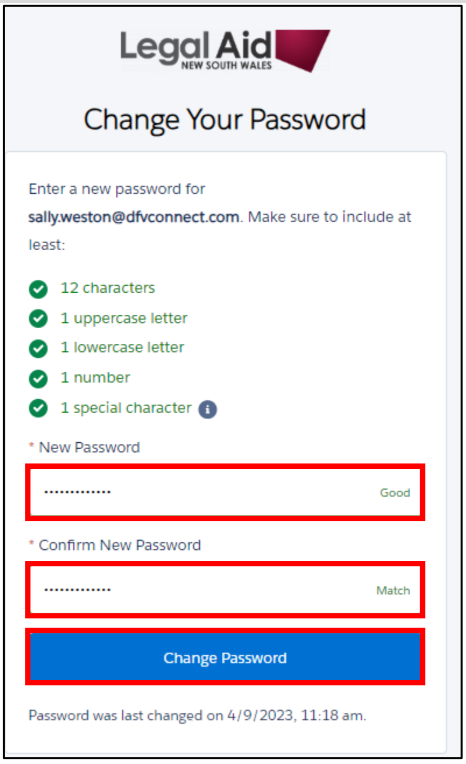
Click on the link in the email.



</td></tr>
</table>

Step	Description
5.	The *Reset your password?* Screen will display. Click **Reset Password** 
6.	The *Answer Your Security Question* will display. Enter your **Answer.** Click **Continue** 
7.	The *Verify your Identity* screen will display On your mobile phone, open the **Microsoft Authenticator App** A verification code will be displayed 

Step	Description
	
8.	On the *Verify your Identity* screen, enter the **Verification Code** and click on **Verify.** 
9.	The *Change Your Password* screen is displayed. Enter your **New Password, Confirm New Password** and select the **Change Password** button.

Step	Description
	
10.	The system will open and the *Home* screen will be displayed.

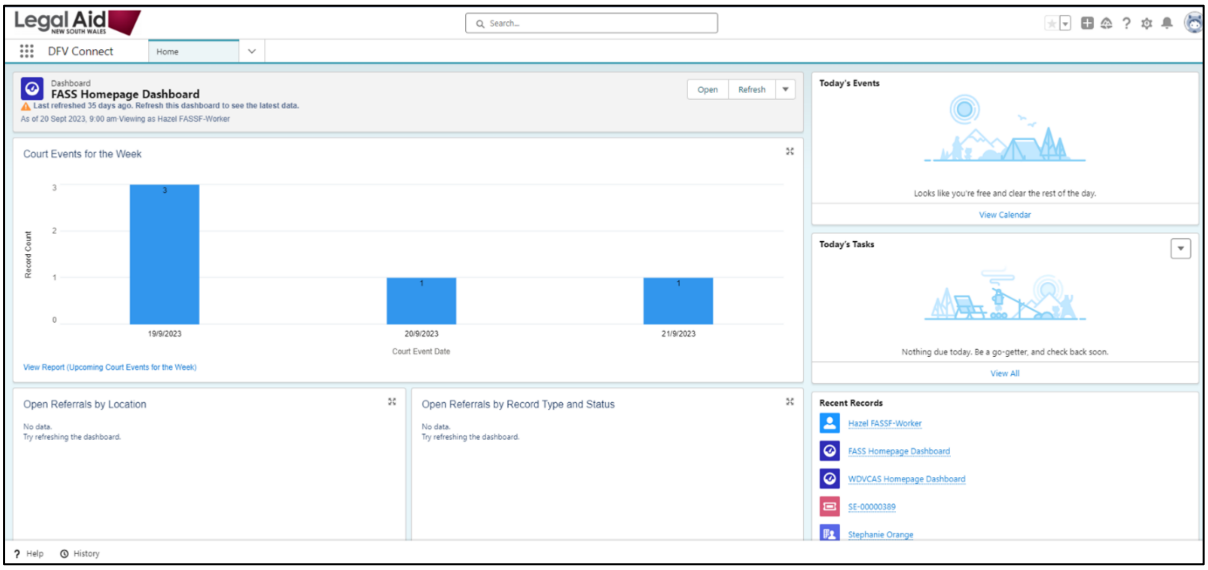
Navigation

Home page

When you first log in, you will see a home page which includes:

- Dashboard reports
- Today's tasks
- Today's calendar events
- Recently accessed records

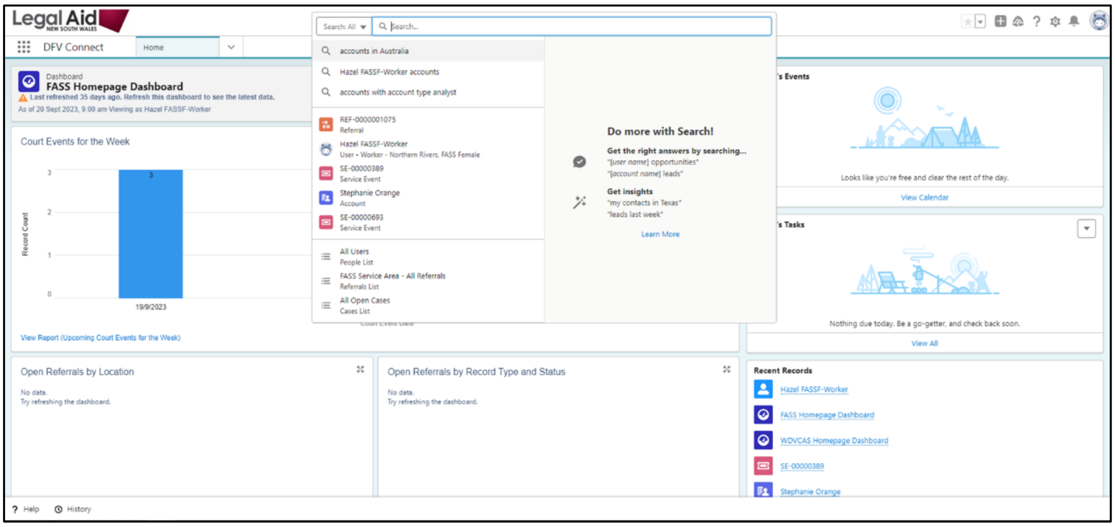
Click **Refresh** to update the data.



Global Search

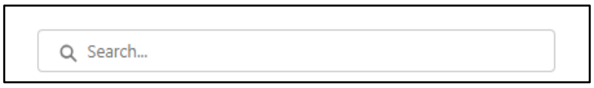
The global search function in DFV Connect are a useful and powerful way to quickly find records and information. You can search for all types of records in the system including:

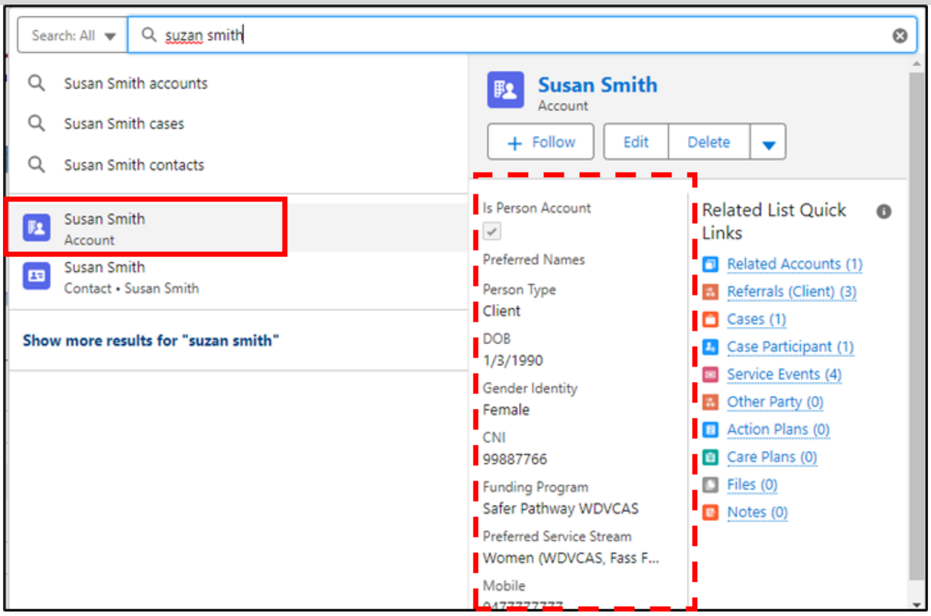
- Person Accounts
- Service Provider Accounts
- Referrals
- Cases
- Contacts
- Calendar events
- Reports
- Service events



The global search functionality uses ‘fuzzy search,’ meaning you can find records which means the system will search for records that match the term provided closely, this includes terms that are misspelled.

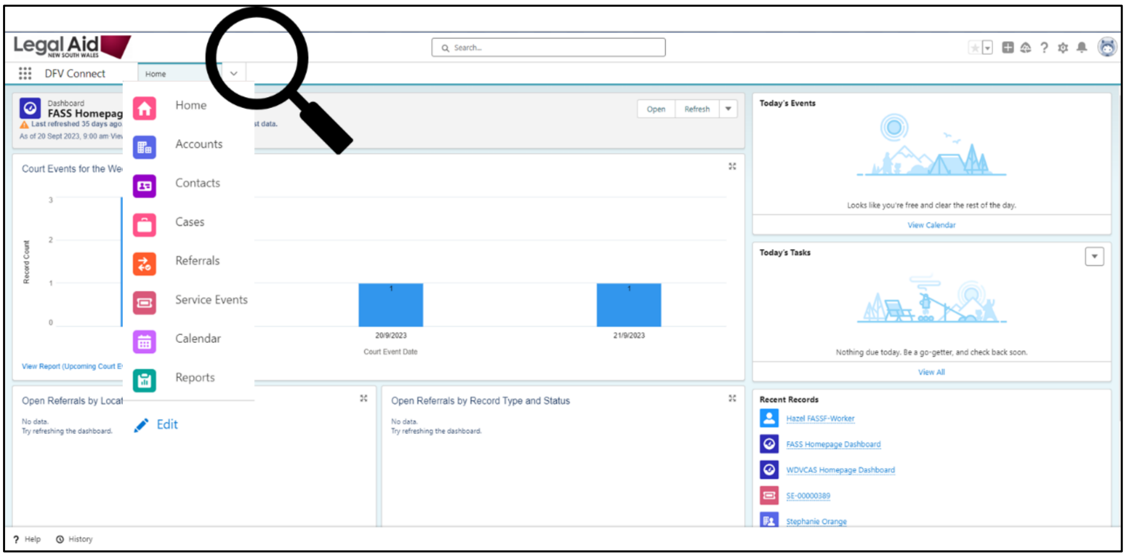
The global search function is recommended for searching for existing records (e.g., client person accounts or referrals) that have already been created in the system. For example, you might use this search function when a client you have previously assisted calls FASS for support, to locate their information.

Step	Description
1.	In the Search bar enter the search criteria, for example: • Person name • Referral number (e.g., REF-0000000251) • Case Number (e.g., C-00001176) • Service Event Number (e.g., SE-00000044) You can search by the exact or partial name or number e.g. Suzan Smith will find Susan Smith and 251 would search all records with these numbers. 
2.	The *Search results* will be displayed. Search results will be restricted to what is visible according to your user profile permissions (e.g. you will not be able to see referrals that are not assigned to your FASS location). If more than one results is displayed, you can hover-over the results (on the left-hand side or the Related List Quick Links on the right-hand side) and the quick view of the record will be displayed. Click on the relevant result to open it.

Step	Description
	

Main Menu

The Main Menu should be used to access specific components/records in DFV Connect. The main records you will use are Accounts, Referrals, Cases, Service Events



Main Menu record/component description

Main Menu Object	Description
Home	The Home page displays dashboard reports, notifications and access to daily tasks, events and recently accessed records.
Accounts	There are two types of accounts in DFV Connect: 1. Person Account (Client, Other Party and Dependant) 2. Service Provider (External Service Provider) A **Person Account** stores details about clients, other parties and dependent children, and associated records including referrals, cases, and service events. You can review a client's person account to understand their history and contact with services. A **Service Provider Account** stores details about all external service providers and individual contacts.
Contacts	Contacts can be created for service provider accounts. Select this option to view, create and manage details of individual (contacts) associated with an external service providers/organisation who made and/or receive referrals.
Cases	A case contains information about services and support provided by your service to a client. You can select this option to access cases created within your service area.
Referrals	Selecting referrals from the main menu will take you to referral list views. You can also create a manual referral when the referral

	record is selected. From the referral record, you can record contact attempts, consent status, and create a case.
Service Events	Selecting service events from the main menu will display all recently accessed service events by you. Service events in DFV Connect are used to record services and support provided, some of these are also functional.
Calendar	The calendar contains all calendar events (appointments, meetings etc.) recorded within DFV Connect. **Note:** This calendar is not synchronised with your email calendar.
Reports	Selecting reports will take you to available reports within DFV Connect. You can use this to create and run reports.

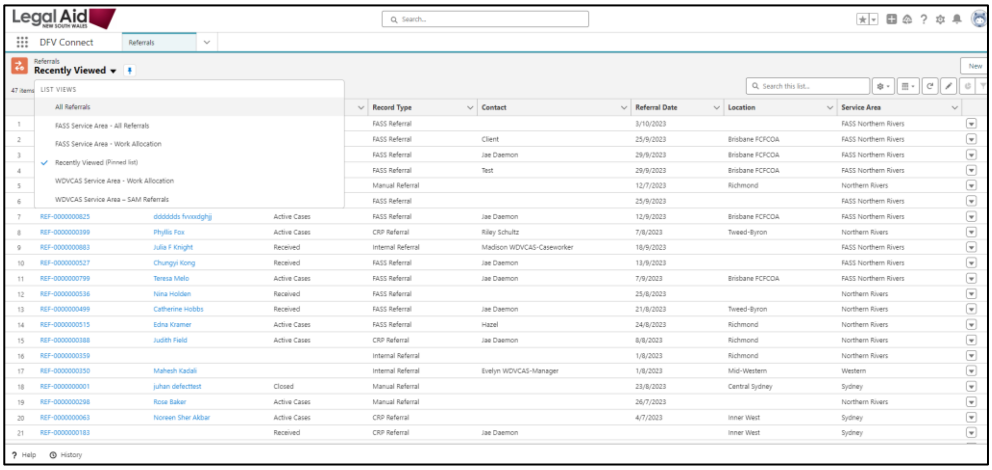
List views

List views provide a way for DFV Connect to group information records (e.g., Referrals, Accounts, Cases etc,) and when you select a particular record, you will be able to quickly see information depending on what you have selected.

When selecting a component from the Main Menu such as Referrals you will be able to access certain list views relevant to their required needs. For example, accessing the FASS Service Area – Work Allocation list view will display all open FASS referrals for your service area.

There are various list views that you can click on depending on what you need to review:

- **Recently Viewed** - This view presents all referrals recently viewed by you.
- **FASS Service Area - All Referrals**: This view lists all referrals within your service area.

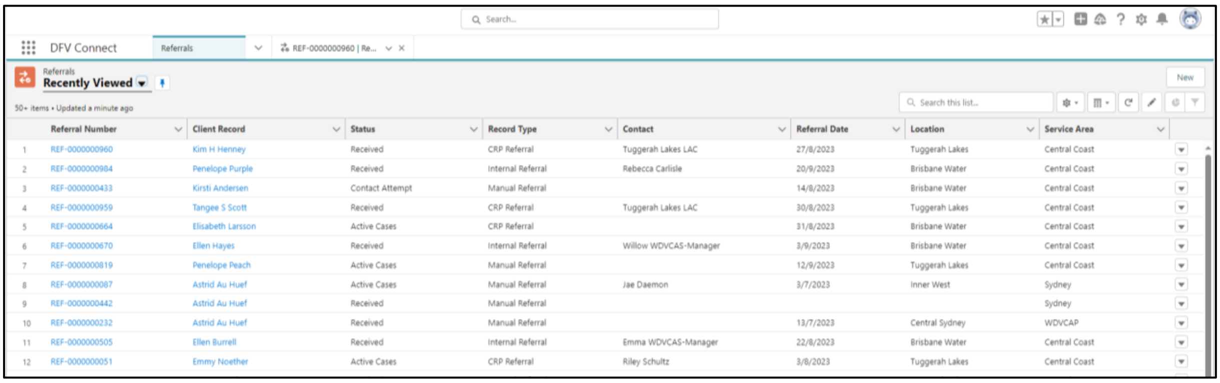


There are two options available for displaying records:

1. Table view
2. Split View

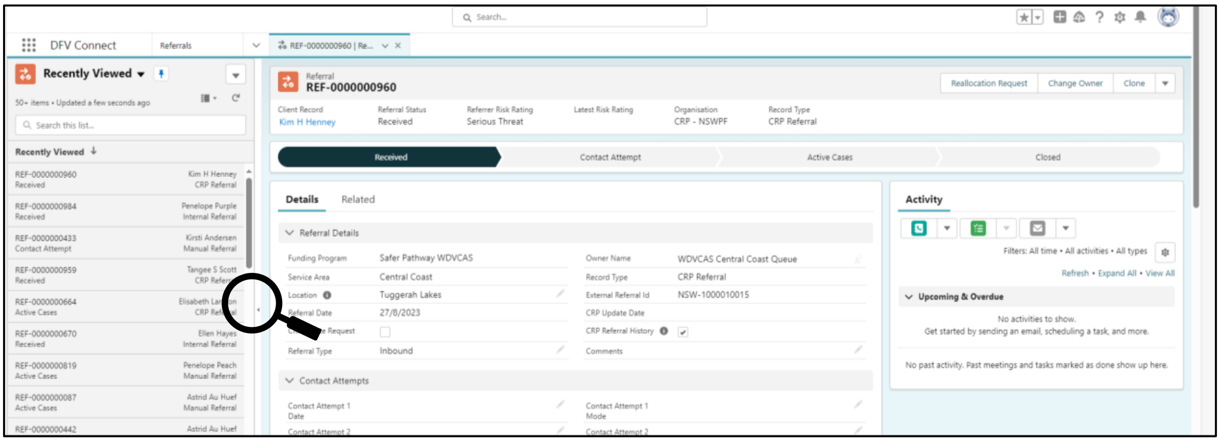
Table view

In this format, data is organised in a table with rows and columns. Use this list view to view high-level information about the record.



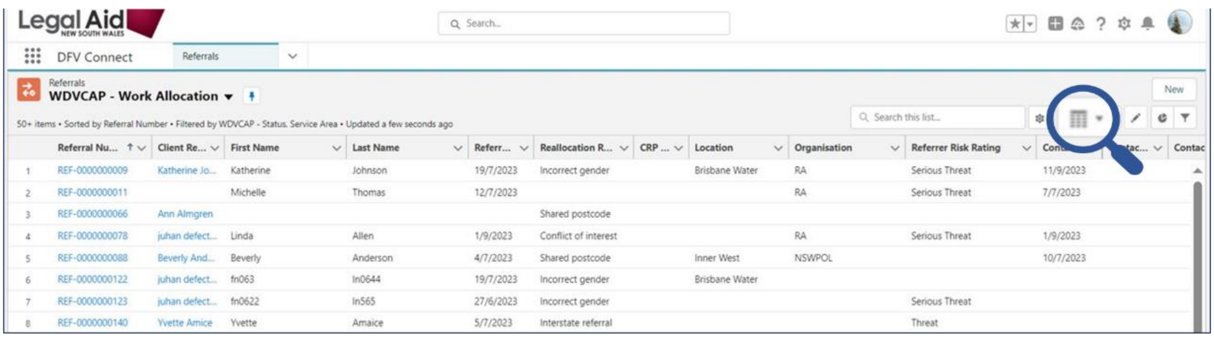
Split view

The split view layout has less information displayed about the record type. You can use this list view to quickly access other records when in a current record.



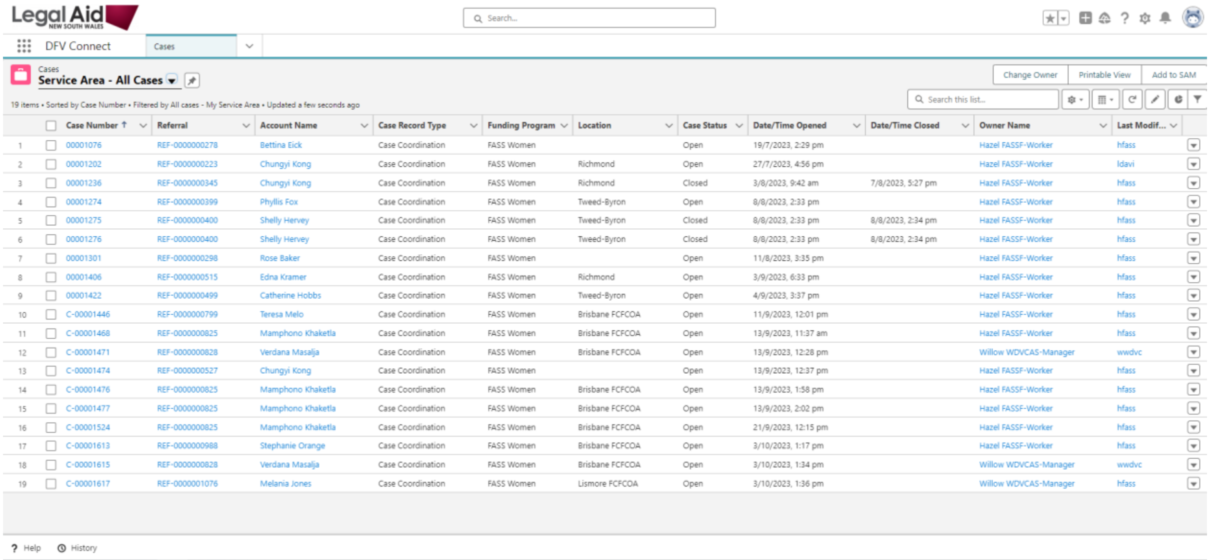
- **Lefthand side pane:** Displays all records within the list view selected.
- **Righthand side pane:** Displays the record selected and accessed.

You can toggle between these views by selecting the table list display (magnifying glass below) and can view the entire record accessed by clicking on the small arrow in the centre of the pane (magnifying glass above).



Case list view

The cases list views will be most relevant to see who your current clients are. For example, the Service Area – All Cases list view will display all open cases for your service area and is useful to see all your clients within your service area.

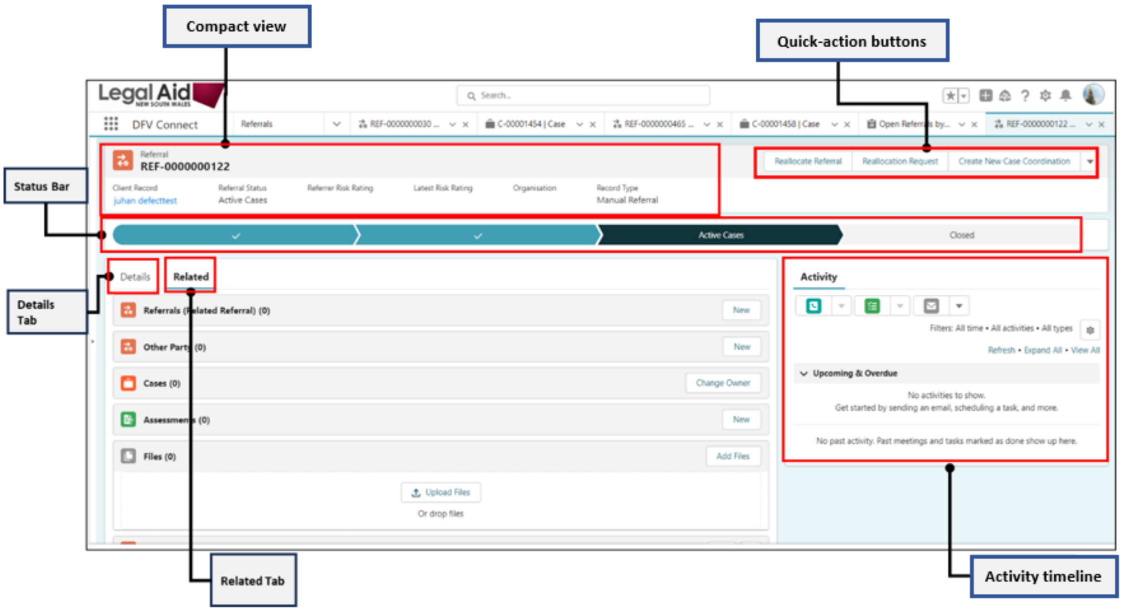


	Case Number	Referral	Account Name	Case Record Type	Funding Program	Location	Case Status	Date/Time Opened	Date/Time Closed	Owner Name	Last Modif...
1	00001076	REF-0000000278	Bettina Eick	Case Coordination	FASS Women		Open	19/7/2023, 2:29 pm		Hazel FASSF-Worker	hfass
2	00001202	REF-0000000223	Chungyi Kong	Case Coordination	FASS Women	Richmond	Open	27/7/2023, 4:56 pm		Hazel FASSF-Worker	ldavi
3	00001236	REF-0000000345	Chungyi Kong	Case Coordination	FASS Women	Richmond	Closed	3/8/2023, 9:42 am	7/8/2023, 5:27 pm	Hazel FASSF-Worker	hfass
4	00001274	REF-0000000399	Phyllis Fox	Case Coordination	FASS Women	Tweed-Byron	Open	8/8/2023, 2:33 pm		Hazel FASSF-Worker	hfass
5	00001275	REF-0000000400	Shelly Hervey	Case Coordination	FASS Women	Tweed-Byron	Closed	8/8/2023, 2:33 pm	8/8/2023, 2:34 pm	Hazel FASSF-Worker	hfass
6	00001276	REF-0000000400	Shelly Hervey	Case Coordination	FASS Women	Tweed-Byron	Closed	8/8/2023, 2:33 pm	8/8/2023, 2:34 pm	Hazel FASSF-Worker	hfass
7	00001301	REF-0000000298	Rose Baker	Case Coordination	FASS Women		Open	11/8/2023, 3:35 pm		Hazel FASSF-Worker	hfass
8	00001406	REF-0000000515	Edna Kramer	Case Coordination	FASS Women	Richmond	Open	3/9/2023, 6:33 pm		Hazel FASSF-Worker	hfass
9	00001422	REF-0000000499	Catherine Hobbs	Case Coordination	FASS Women	Tweed-Byron	Open	4/9/2023, 3:37 pm		Hazel FASSF-Worker	hfass
10	C-00001446	REF-0000000799	Teresa Melo	Case Coordination	FASS Women	Brisbane FCFCOA	Open	11/9/2023, 12:01 pm		Hazel FASSF-Worker	hfass
11	C-00001468	REF-0000000825	Mamphono Khaketla	Case Coordination	FASS Women	Brisbane FCFCOA	Open	13/9/2023, 11:37 am		Hazel FASSF-Worker	hfass
12	C-00001471	REF-0000000828	Verdana Masalja	Case Coordination	FASS Women	Brisbane FCFCOA	Open	13/9/2023, 12:28 pm		Willow WDVCAS-Manager	wwdvc
13	C-00001474	REF-0000000527	Chungyi Kong	Case Coordination	FASS Women		Open	13/9/2023, 12:37 pm		Hazel FASSF-Worker	hfass
14	C-00001476	REF-0000000825	Mamphono Khaketla	Case Coordination	FASS Women	Brisbane FCFCOA	Open	13/9/2023, 1:58 pm		Hazel FASSF-Worker	hfass
15	C-00001477	REF-0000000825	Mamphono Khaketla	Case Coordination	FASS Women	Brisbane FCFCOA	Open	13/9/2023, 2:02 pm		Hazel FASSF-Worker	hfass
16	C-00001524	REF-0000000825	Mamphono Khaketla	Case Coordination	FASS Women	Brisbane FCFCOA	Open	21/9/2023, 12:15 pm		Hazel FASSF-Worker	hfass
17	C-00001613	REF-0000000988	Stephanie Orange	Case Coordination	FASS Women	Brisbane FCFCOA	Open	3/10/2023, 1:17 pm		Hazel FASSF-Worker	hfass
18	C-00001615	REF-0000000828	Verdana Masalja	Case Coordination	FASS Women	Brisbane FCFCOA	Open	3/10/2023, 1:34 pm		Willow WDVCAS-Manager	wwdvc
19	C-00001617	REF-0000001076	Melania Jones	Case Coordination	FASS Women	Lismore FCFCOA	Open	3/10/2023, 1:36 pm		Willow WDVCAS-Manager	hfass

Record navigation

A record in DFV Connect is how information is stored, there are various record types including a referral, case, client account etc. When you access a record type (i.e.., a referral, case, or client account) in DFV Connect, you will have various functions and types of information available that are specific to the record selected.

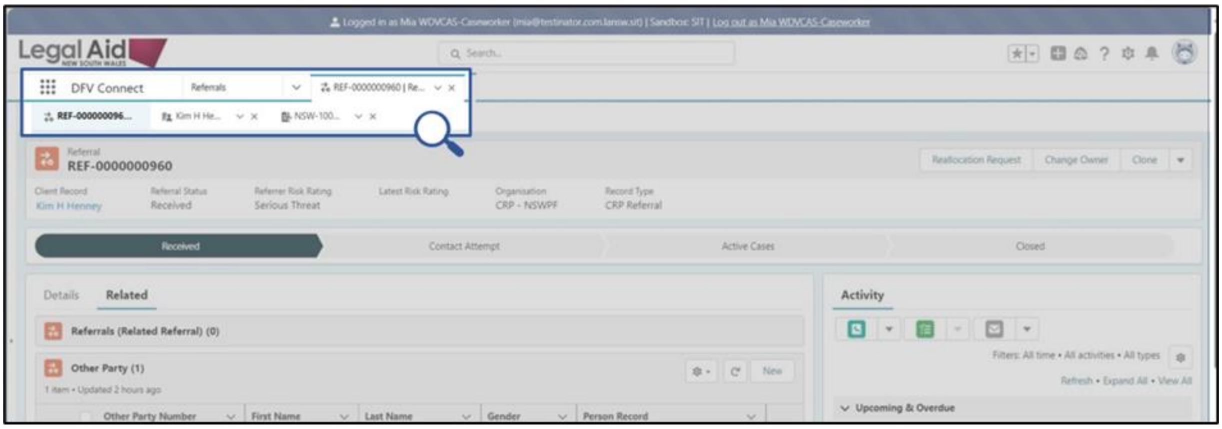
To access a certain record, click record number. For example, you can access a referral by clicking on the REF-00000122.



Object	Description
Compact view	Situated at the top of the record, displays specific information about the record.
Quick-action buttons	The quick action button function allows users to perform actions directly relating to the specific record. Availability of buttons will vary depending on the type of record selected as the functions differ with record type.
Status bar	Displays the record's current status.
Details tab	Displays details about the record selected.
Related tab	Displays information and records relating to the record selected.
Activity timeline	The activity function allows users to log activities for the specific record (e.g., log a call, create a task or email). Once an activity is record, it will appear on the activity timeline.

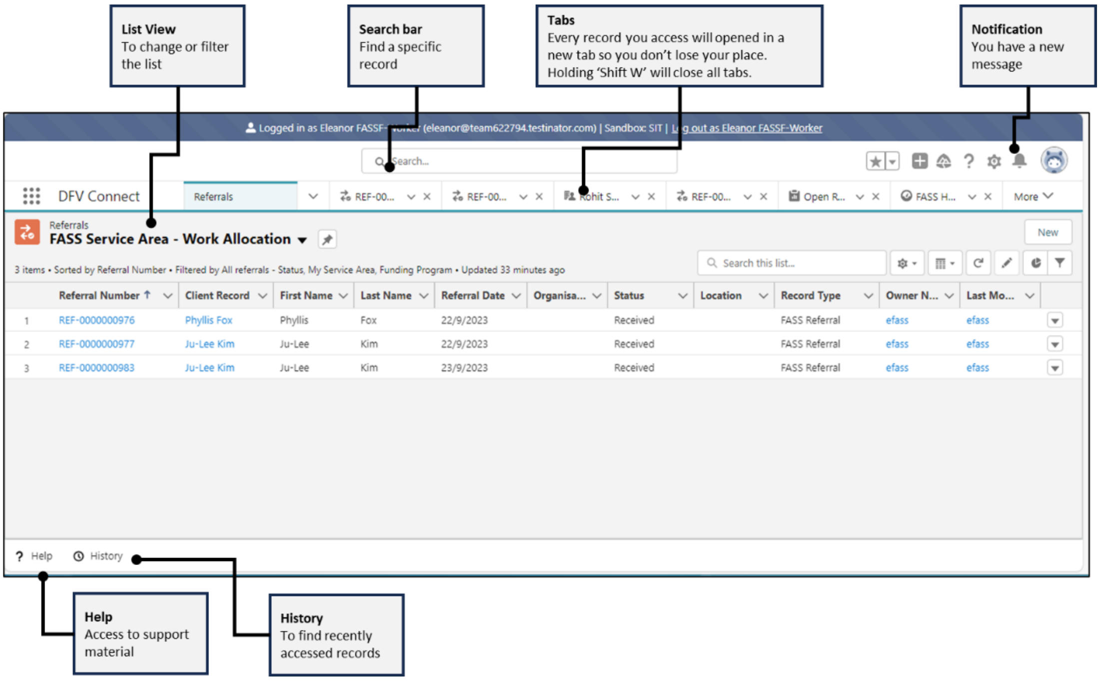
Opening multiple related records

When you open a record related to a parent record, it will open in a 'sub-tab' either beneath or to the right of the original record opened. This hierarchical arrangement allows you to navigate between connected records.



General terms

See below diagram for key terms in DFV Connect.



Accounts

'Accounts' in DFV Connect is the record type where primary information is stored about clients and external service providers. In DFV Connect, there are two types of accounts:

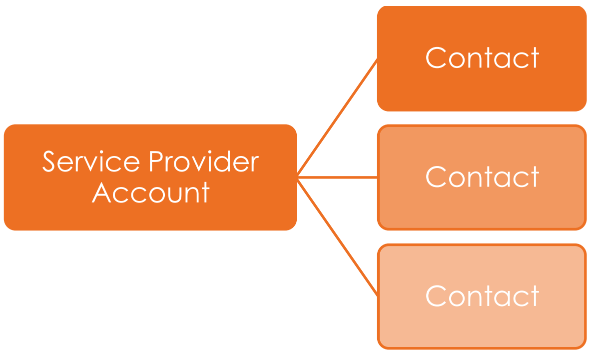
3. Person Account
4. External Service Provider Accounts

Service Provider Accounts

The Service Provider Account stores details about **external service providers** (e.g., external referral partners) and their individual contact information.

These accounts are an effective way to store information about all your external service providers and relevant individual contacts.

Visibility	All external service provider accounts are visible and editable by all users across funding programs within the system.



Practice rules

- Your **local external service provider** list maintained outside of DFV Connect should be updated with DFV Connect Service Provider Account name to avoid duplicates within the system. At a local level it is recommended that staff regularly review their local external service provider list on a quarterly basis, to ensure it is current and up to date with the Service Provider Account stored in DFV Connect.

Create service provider account

Notes

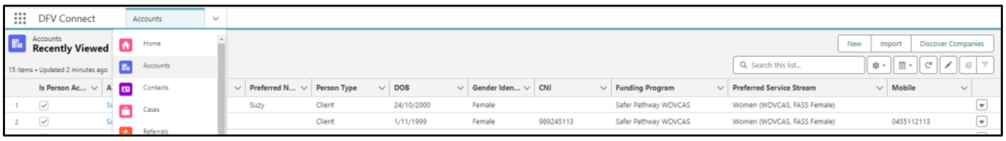
- You should always **search** for a service provider account before creating a new one

Process steps

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>

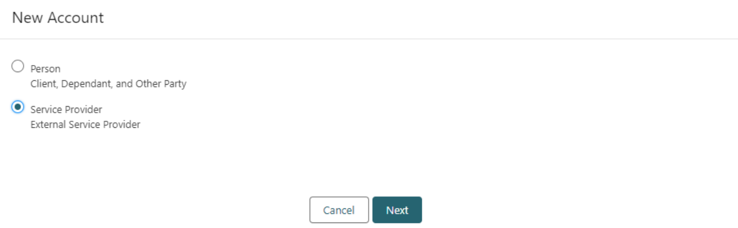
After searching for the service provider account and no existing account is found, to create a new account:

- Select **Accounts** from the main menu and
- then **New** in the top righthand corner.



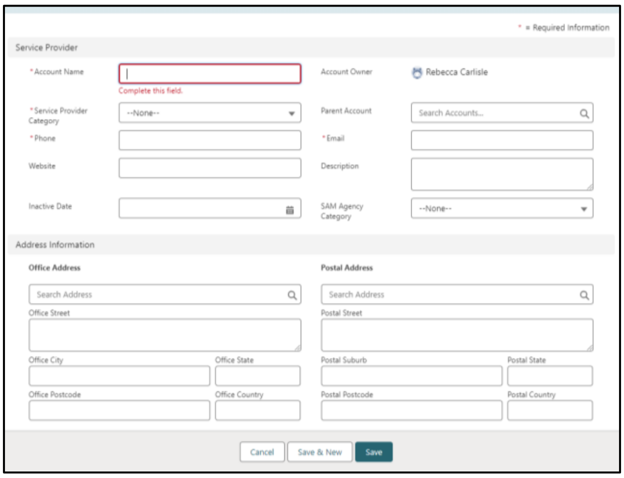
</td></tr>
<tr><td>2.</td><td>

The *New Account* screen will be displayed. Select **Service Provider - External Service Provider** radio button. Click **Next.**



</td></tr>
<tr><td>3.</td><td>

The *New Account: Service Provider* screen will be displayed. Enter as many details as possible and select **Save.**



</td></tr>
<tr><td>NOTE</td><td>

Service provider category: There are a few fields on the service provider account that are mandatory, including the Service Provider Category field - this ensures reporting is easy to categorise.

External referral service event: The service provider account option is available on the external referral service event.

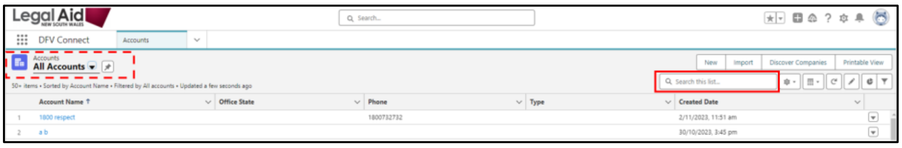
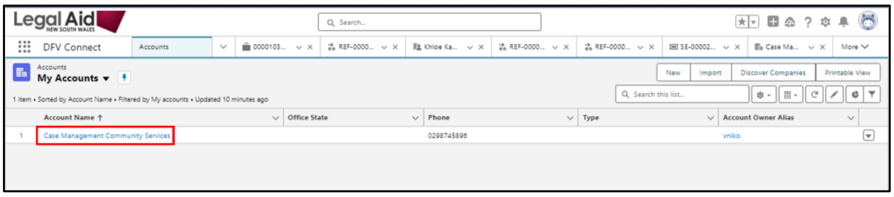
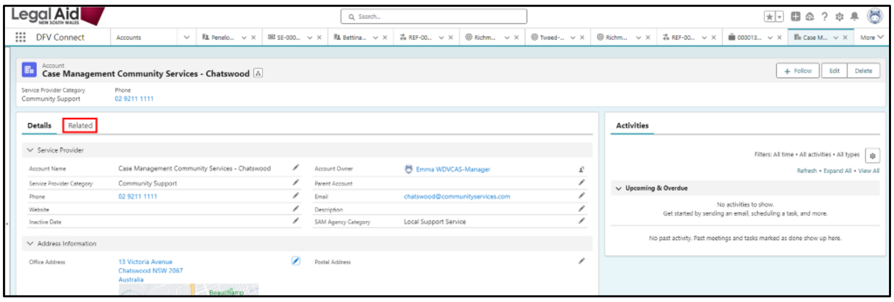
Remove service provider account: To remove a Service Provider, you can do a global search to locate the account, click a pencil icon to edit and enter the date of inactivity.

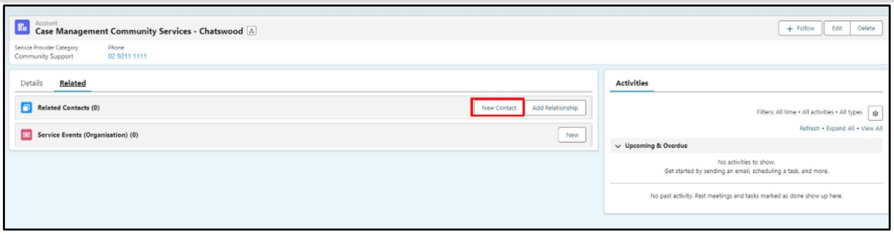
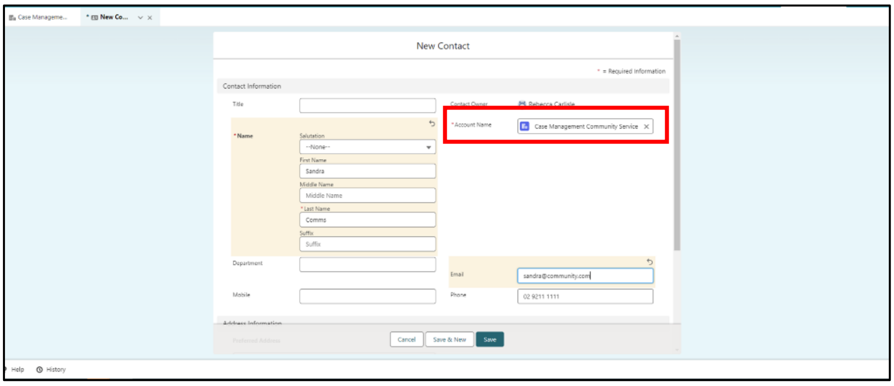
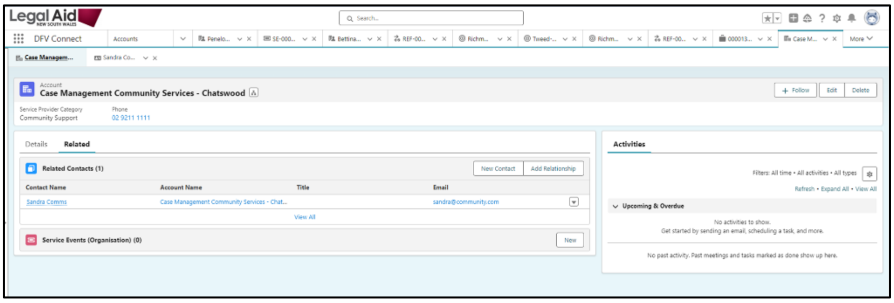
</td></tr>
</table>

Create contact

You can create multiple individual contacts for a service provider account. There must be an existing service provider account before you can create a contact.

Process steps

Step	Description
1.	From the Main Menu, select **Accounts** to open the list of existing service provider accounts. Ensure the ‘All Accounts’ or ‘Service Provider Accounts’ list view is selected before searching for the existing account. 
2.	Once the relevant account is located, select the hyperlink on the account name to access the account.  Where no existing account is located, see steps on creating a service a provider account to proceeding with creating a contact.
3.	Click on the **Related** tab on the Service Provider record. 
4.	Select New Contact button to add an individual contact person. You can add as many individual contacts as required per service provider account.

Step	Description
	
5.	The account name will automatically populate with the service provider account details. Enter the details and click on the **Save** button. 
6.	The individual contact is now saved as a contact on the service provider account. 

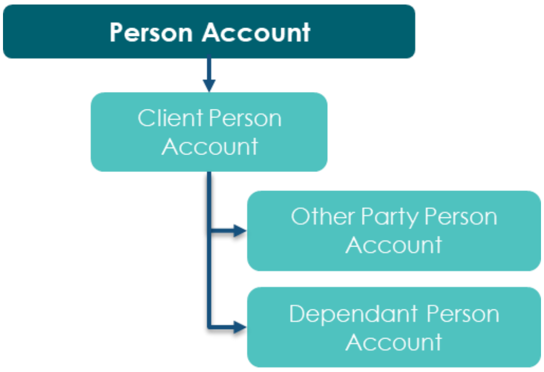
Person Account

The 'Person Account' in DFV Connect stores details and information about all FASS clients, the Other Party, and their Dependent Children. There are three types of Person Accounts:

- Client
- Other Party
- Dependent Children

To add information about your client's dependent children, you can add the relationship and create a new account to save information about these related parties.

Visibility	All person accounts are **visible and editable** by users within your funding program (i.e. FASS Women and FASS Men only). All edits are tracked when updated so you can easily see when an account was last modified.



When to create a client person account

As all information is stored within the client person account, a client person account must be created and/or linked to all referrals received. See create and/or link client person account for process steps.

Practice rules

a. All **client person accounts** should be created from a referral (i.e., manual, and internal referrals). See link and/or create client person account for process steps.

b. Client person account can also be created for women involved in Apprehended Personal Violence Order (APVO) matters, i.e., personal violence orders such as stalking, sexual assault offences and vulnerable women and for women with whom your service has not had contact with but there has been a link to:

   - A critical incident
   - Serious concerns from a stakeholder and the matter needs to be tracked
   - No contact 'at serious threat' referral which will be referred to a SAM.

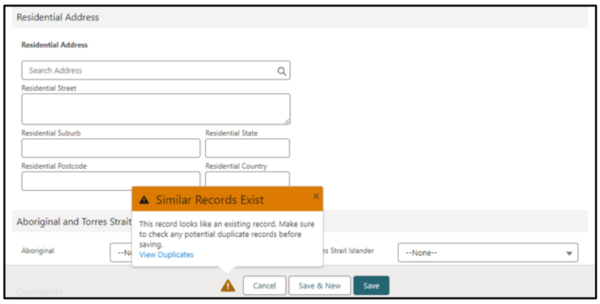
Duplicate person accounts

As it is general practice to check for an existing person before creating a new one, over time there should be less duplicate person records created. The system will identify duplicates where the first name, last name, funding program (FASS Women, FASS Men) and either:

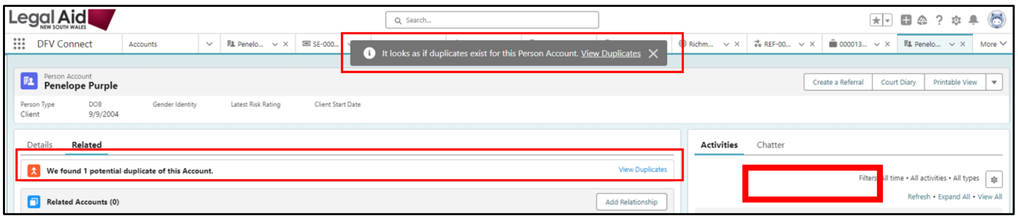
- Date of Birth
- Email
- Street and city or postcode
- Mobile
- Work phone

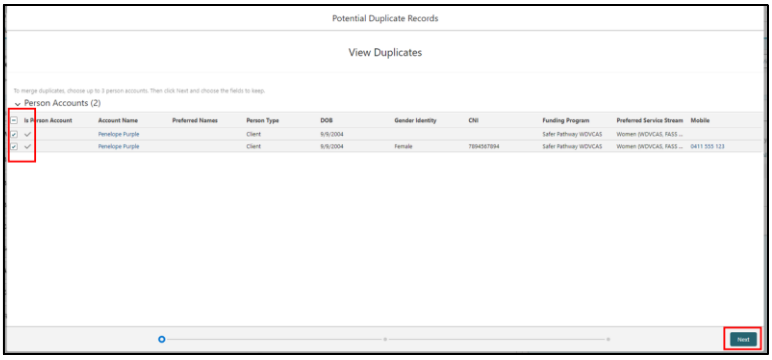
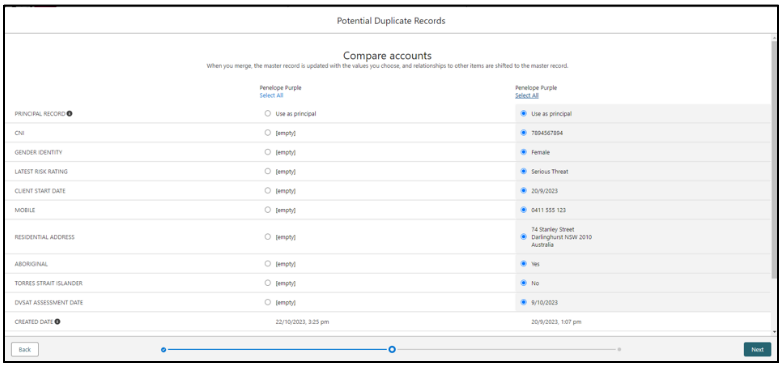
are a match or a partial match. For example, it will identify Amanda Smith and Amanda Smith with the same address as being a potential duplicate.

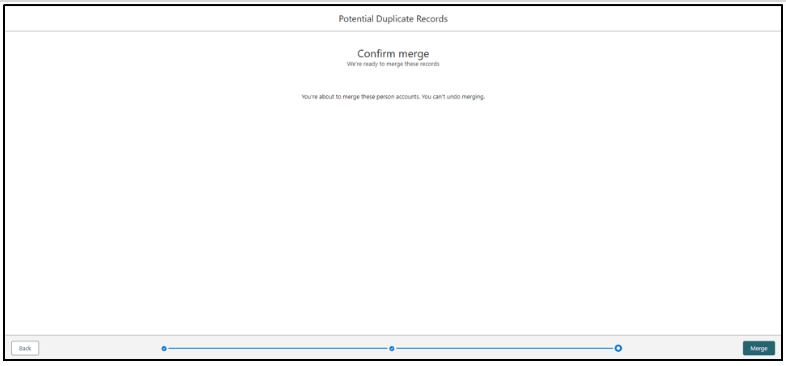
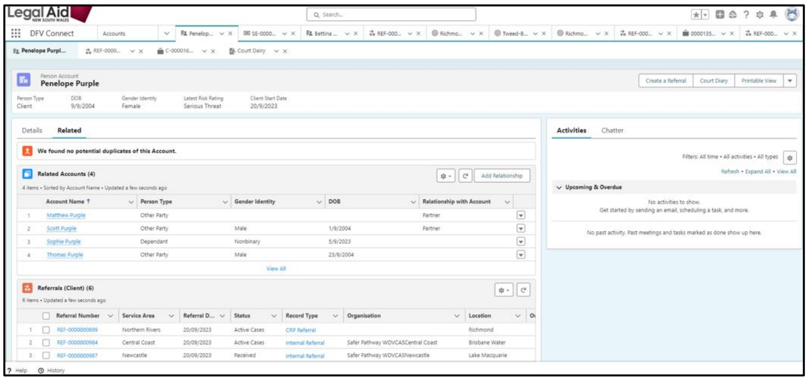
- Only Managers and assistant managers have permissions to merge duplicate accounts.
- Where you identify a duplicate account, contact your manager to about merging the duplicate account.
- If you are creating a person record and the system recognises there is a potential duplicate you will receive a notification, 'It looks as if duplicates exist for this Account.'



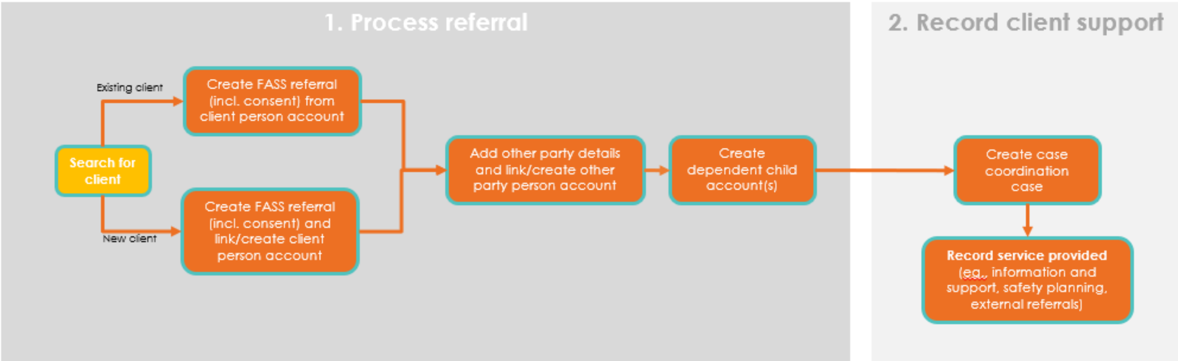
Process steps (Managers)

Step	Description
1.	To merge a duplicate account, from the Person Account, click on the **Related** tab and then **View Duplicates.** 
NOTE	Amanda Smithers may not be automatically picked up as a duplicate of Amanda Smith with the same address unless both records also have the same email, work, or phone

Step	Description
	number. If you are certain they are duplicates, add the same phone number to each record, and the system will then identify the duplicate.
2.	The *Potential Duplicate Record* screen will display the overview of duplicate client details. Select the checkbox on the records and **Next**. 
3.	The *Compare accounts* screen will be display displayed. By default, the duplicate screen will show initially fields that are different, you should review to ensure they are duplicates. • Select the most up-to-date fields to be merged. • To save time, select 'use as principal' where the fields are most correct. • Once you have selected all of their details, click **Next** 
4.	The *Confirm merge* screen will display. **It is important to review the accounts before merging as it is an extremely complex task to be undone.** When you are certain the records are the same person, click **Merge.**

Step	Description
	
5.	Once merged, all records will appear on the principal account selected. 

Client Intake



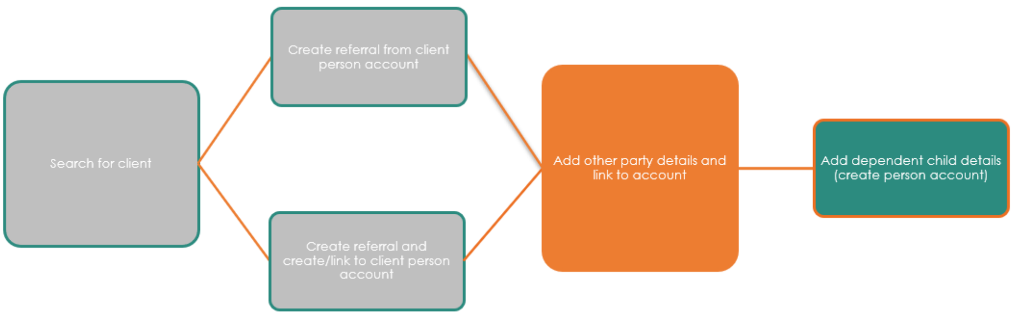
Process Referrals

FASS Social Support Staff receive referrals for persons affected by domestic and family abuse with family law issues. These referrals may come from the DVU (Domestic Violence Unit), EIU, FAMAC (Family Law Assistance for Aboriginal Communities), judicial officers, private lawyers, NGOs, or self-referrals to provide legal or social support while one navigates the family law system or continues to have family law challenges.

All referrals received by FASS Women and FASS Men are recorded in DFV Connect as two types of referrals:

1. **FASS Referral:** referrals that are manually entered in the system (i.e.., referrals received by phone, email and at court)
2. **Internal Referral:** referrals made internally through DFV Connect by DFV Connect users, for example, referrals made from a FASS Social Support Service to a WDVCAS (see 'Prepare Internal Referral' service event for more information on how to create an internal referral).

Visibility	All referrals are **visible** by users within your funding program (e.g., FASS only). Users can only **edit** referrals assigned to their service area.

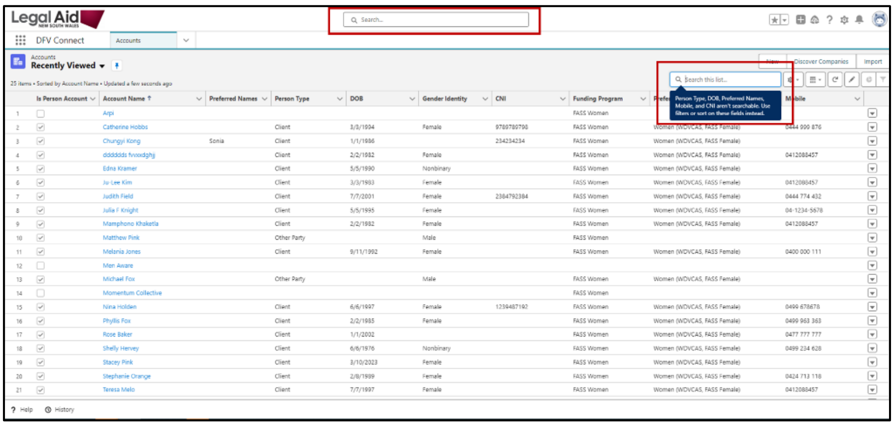


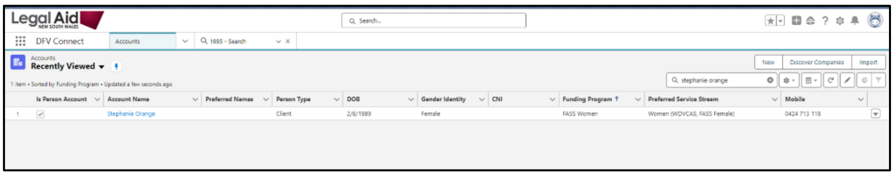
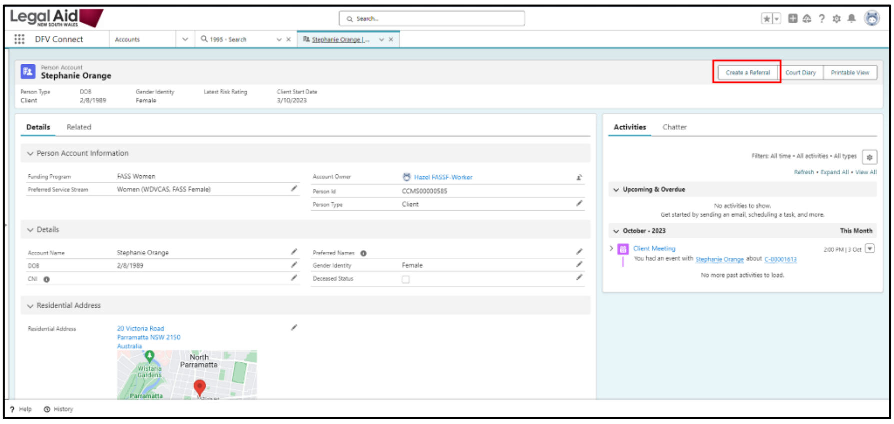
To create a FASS referral, you should search for an existing client person account in DFV Connect.

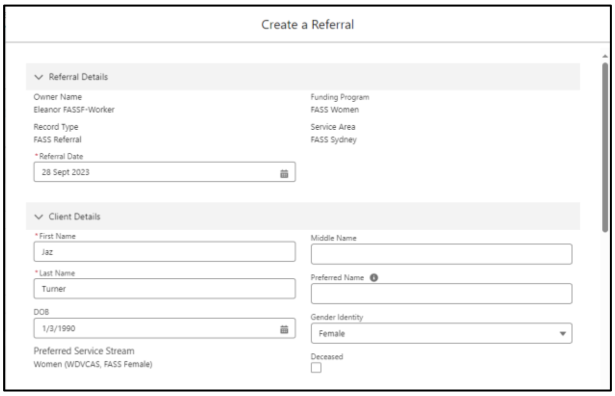
You can create a FASS Referral from a person account, or you can create a referral and link the referral to a person account. **All Referrals must be linked to a Person Account.**

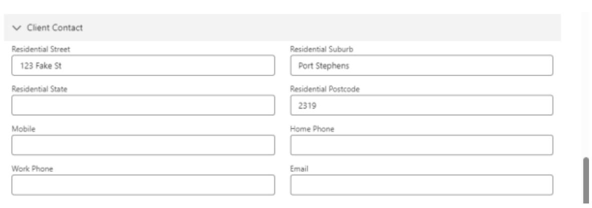
Create a referral for existing client

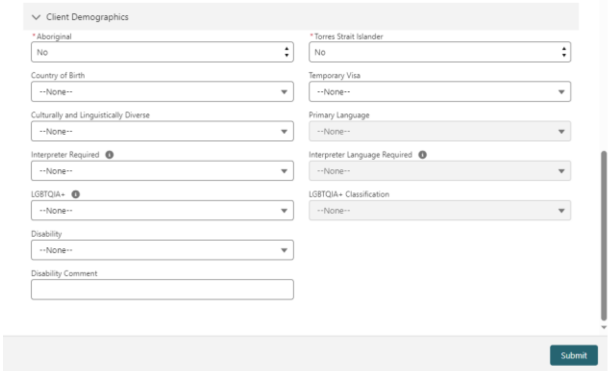
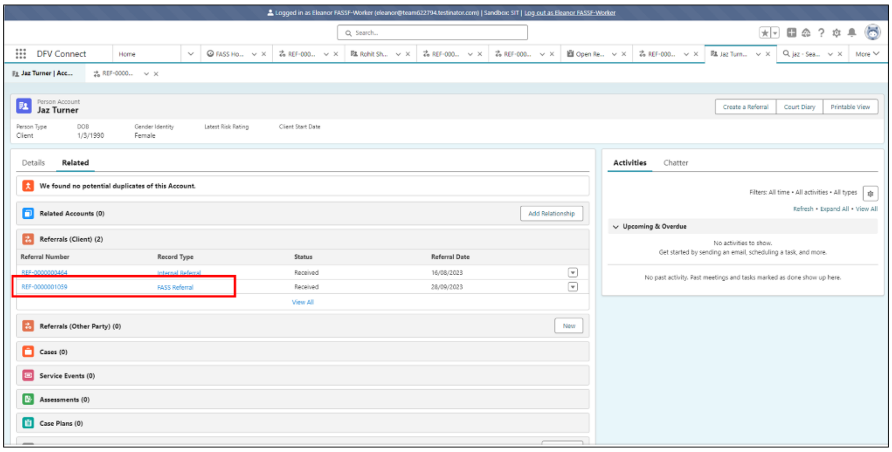
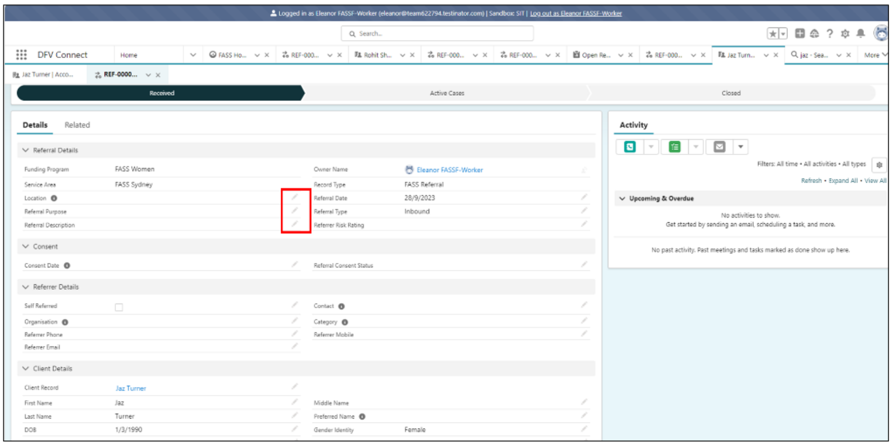
Process steps

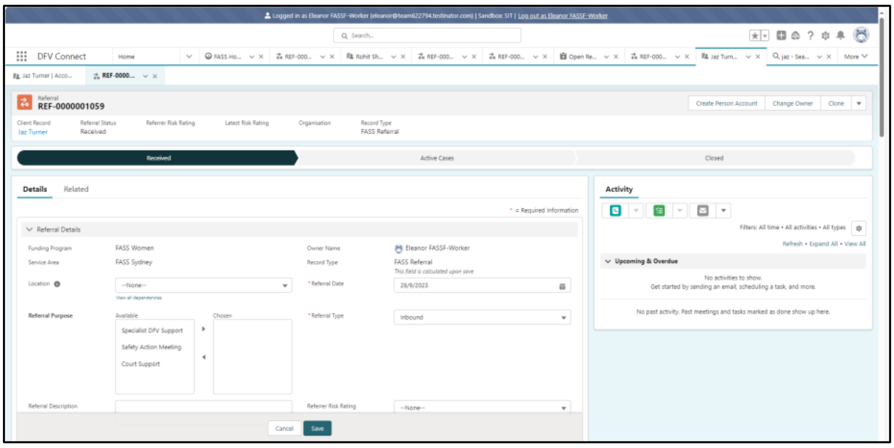
Step	Description
1.	Search for your client person account using one of the methods: 1. Using a global search function. This searches for all records and components in the system. This is the search bar at the top of the screen. 2. Accessing the record type from the main menu and searching when in the particular record type. In DFV Connect, all client records are stored as 'Accounts,' so we have selected 'Accounts' from the main menu to search for a particular person using the search button on the righthand side. Only names can be searched using this function, but you can filter by columns selected to see other information. If you need to search by other criteria, you can use the global search function. 

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>2.</td><td>In this scenario, we have found an existing client record for the person searched for. To access the account and create a referral, you can click on the link in the account name column.
</td></tr>
<tr><td>3.</td><td>The client Person Account will be displayed. Click on the quick-action button Create a Referral.
</td></tr>
<tr><td>4.</td><td>The Create a Referral quick-action pop-up screen will display with all client information pre-populated onto the new referral.

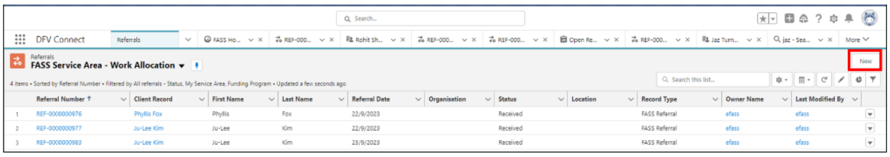
Referral Details section:
Service Area will be defaulted to your FASS Service Area
Enter Referral Date
Client Details and Demographics sections
Enter Client Details including First Name, Last Name, DOB, Gender Identity, Preferred Service Stream, and other contact details</td></tr>
<tr><td></td><td>

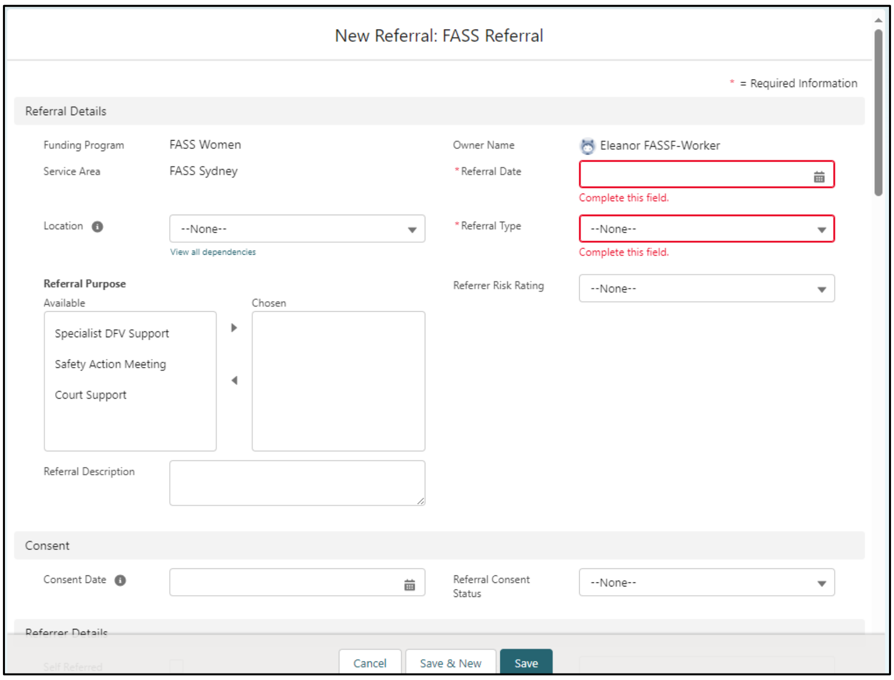
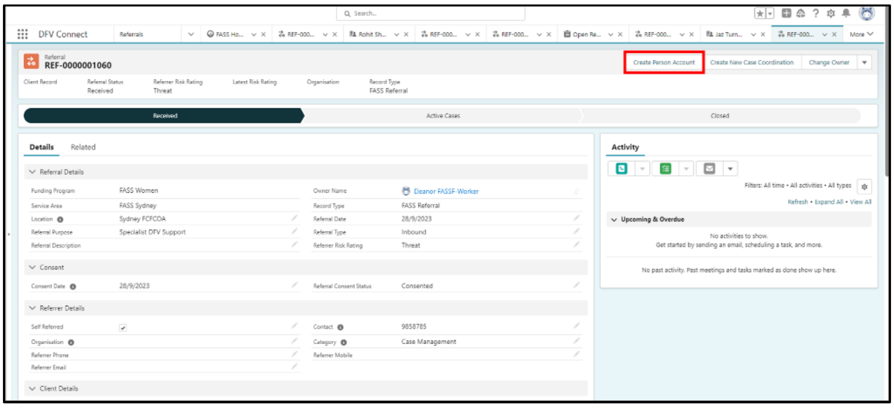

</td></tr>
</table>

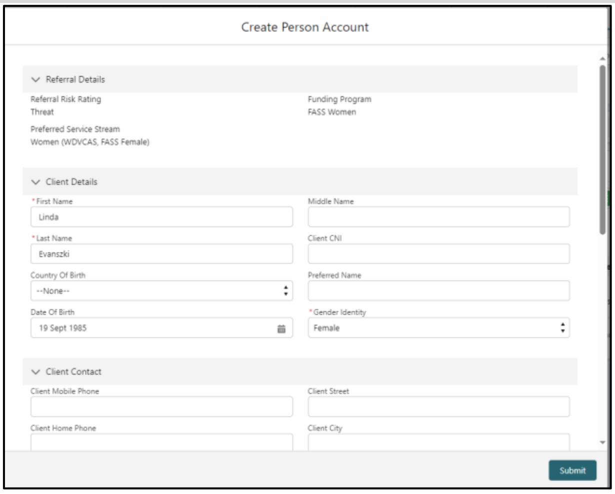
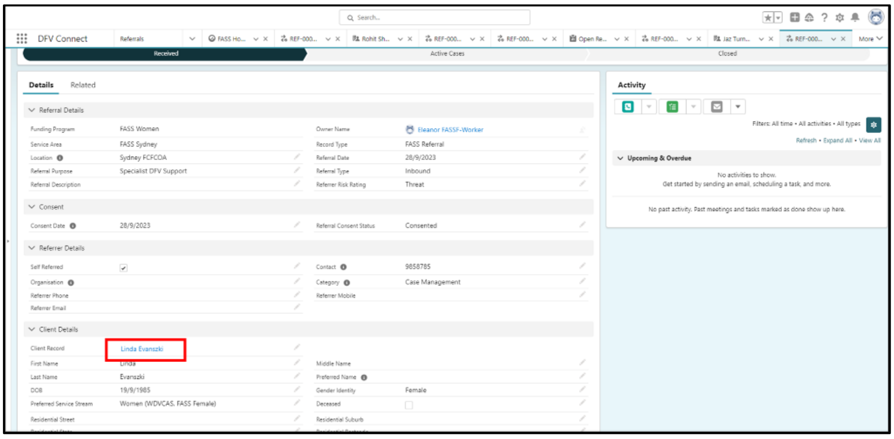
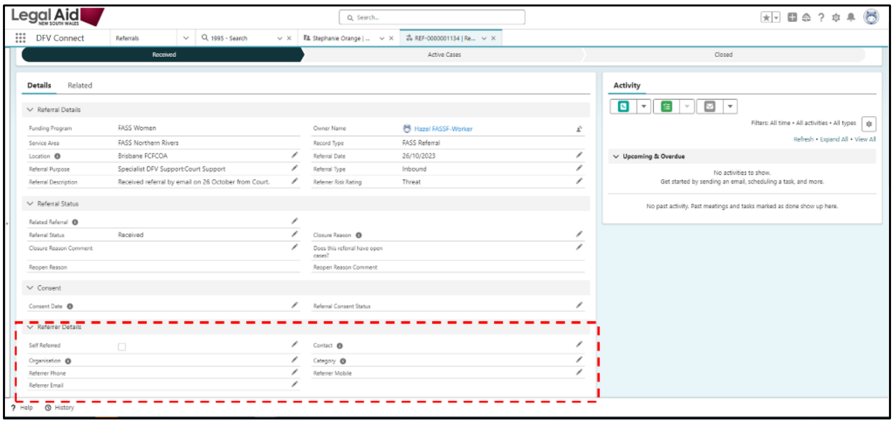
Step	Description
	• Select whether Aboriginal/Torres Strait Islander Complete as many fields as you can and click on the **Submit** button. 
5.	The referral will be saved. You can access the newly created referral from the **Related** tab of the client's Person Account. Click on the referral to open it and continue the referral creation process. 
6.	The referral will be displayed. Click on the Edit icon to complete all required fields. 
7.	Complete the Referral sections and select **Save** once completed.

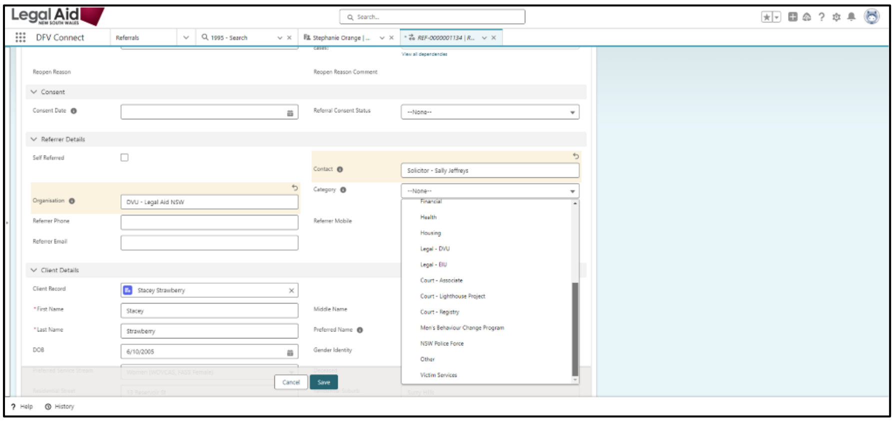
Step	Description
	• **Referral Details** – Location, Purpose, Description, Date, Type (**Referral Type** field is a system generated mandatory field. Either ‘Inbound’ or ‘Outbound’ can be selected – it does not affect the referral information), Risk Rating • **Consent** – record consent date and status • **Referrer Detail** - Indicate whether referral is Self-Referred, or client was referred by an organisation • **Client details** – some of the fields will be prepopulated from client’s Person Account, complete as many as you can • **Client Demographics** - some of the fields will be prepopulated from client’s Person Account, complete as many as you can • **Family Cout Details –** Court File Number, Client Represented, Representation Details • **ADVO and Charge Details** – Existing ADVO, Current ADVO Conditions • **Additional Referral Details** – Sexual Assault, Homicide, Victim aged under 18. Strangulation Disclosed, Child Protection Concerns, Dependent Child Information • **Conflict of Interest** – Conflict of interest (Y/N), Conflict of Interest Description • **Referral Status** – Related Referral, Referral Status, Closure Reason, Closure Comment, Does this referral have open cases, Reopen Reason, Reopen Reason Comment 
8.	Once you populated all fields and saved the referral you will be able to add other party details and add dependent child details.

Create a referral for new client

Step	Description
1.	Select the **Referrals** component from the Main Menu and click **New.** 
2.	The **New Referral: FASS Referral** screen will be displayed. Complete sections and select **Save** once completed. • **Referral Details** – The funding program and service area will always default to yours, if you work across one or more family courts within your service area, you must select this location. Enter Location, Purpose, Description, Date, Type (**Referral Type** field is a system generated mandatory field. Either 'Inbound' or 'Outbound' can be selected – it does not affect the referral information), Risk Rating • **Consent** – record consent date and status • **Referrer Detail** - Indicate whether referral is Self-Referred, or client was referred by an organisation • **Client details** – complete as many fields as you can – fields marked with * are mandatory fields • **Client Demographics** - complete as many fields as you can – fields marked with * are mandatory fields • **Family Cout Details –** Court File Number, Client Represented, Representation Details • **ADVO and Charge Details** – Existing ADVO, Current ADVO Conditions • **Additional Referral Details** – Sexual Assault, Homicide, Victim aged under 18. Strangulation Disclosed, Child Protection Concerns, Dependent Child Information • **Conflict of Interest** – Conflict of interest (Y/N), Conflict of Interest Description

Step	Description
	• **Referral Status** – Related Referral, Referral Status, Closure Reason, Closure Comment, Does this referral have open cases, Reopen Reason, Reopen Reason Comment 
3.	Once you complete the form and save it, the Referral will be opened. Click on the **Create Person Record** button, to link the referral to a client person account. *All referrals **must** be linked to client person account to maintain a client history.* 
4.	The Create Person Account screen will be displayed. Complete as many fields as you can and click on the **Submit** button.

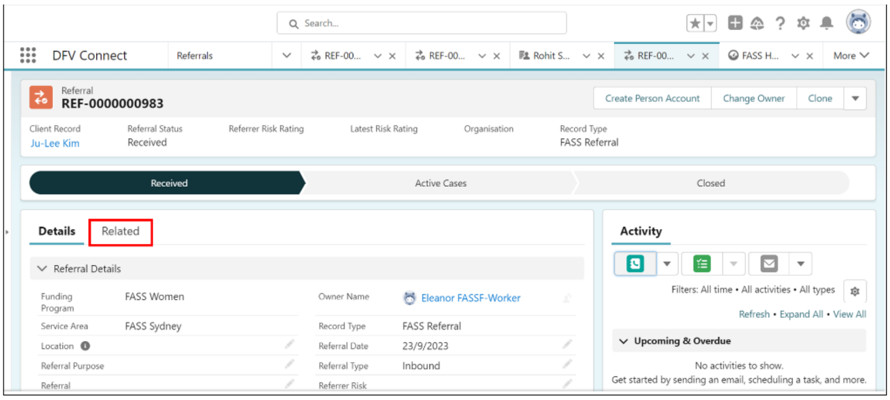
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>5.</td><td>Now that the client's details are saved into a person account, the referral will show that client record exists (there is a link under the Client Details).

</td></tr>
<tr><td>6.</td><td>Complete the referral details (click on the edit (pencil) icon) and complete add information about the referrer – either self-referred or an individual.

</td></tr>
</table>

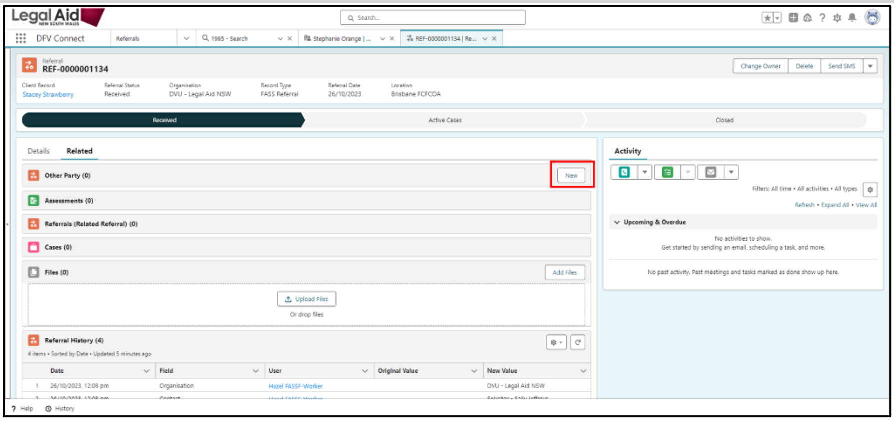
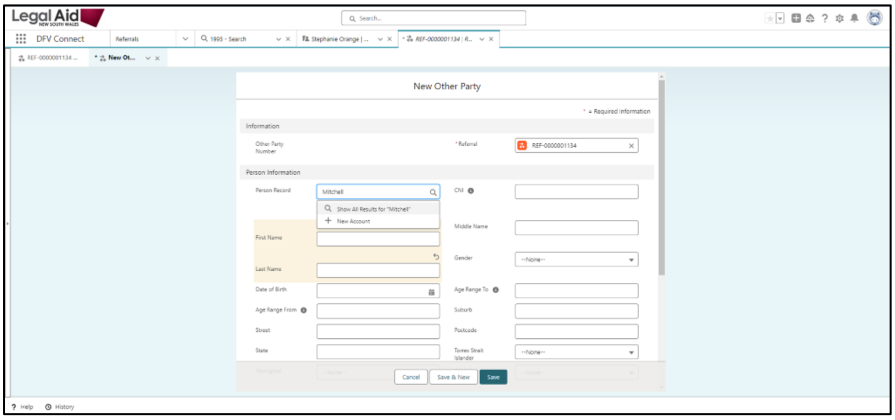
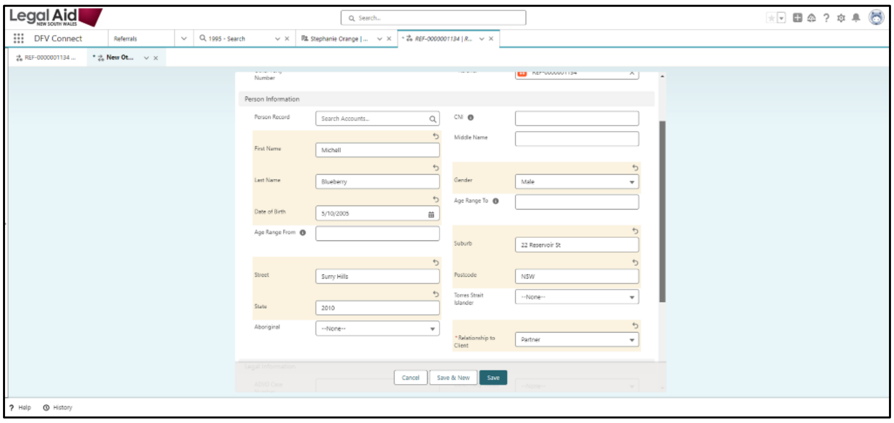
Step	Description
7.	When entering referrer details that are not self-referred, you must select the category they relate to. These categories are relevant to FASS and it is important it is recorded so we can report on all FASS referrals received. Once you have entered in all information about the referral received on the referral details page received, click save. 

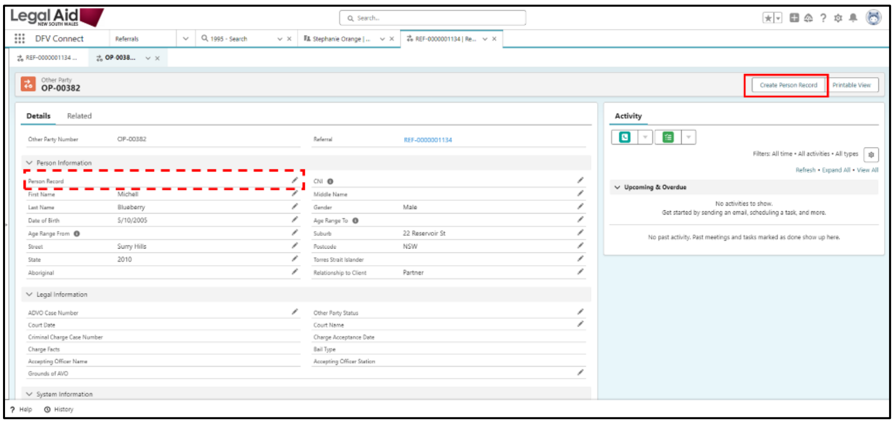
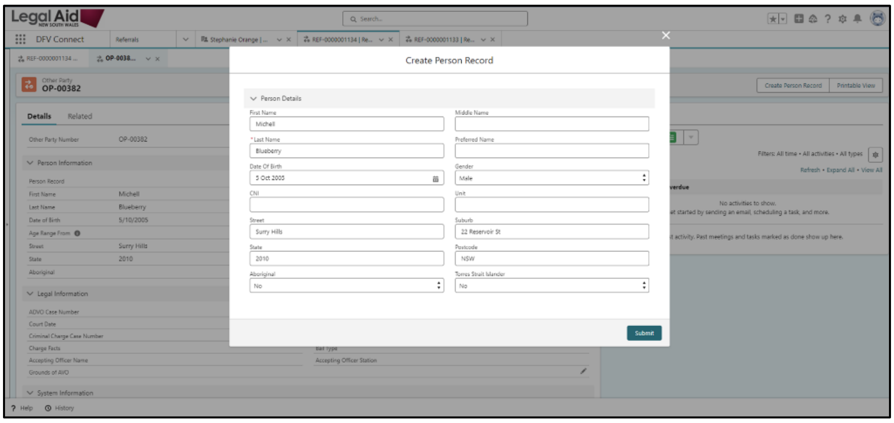
Add other party to referral and link/create account

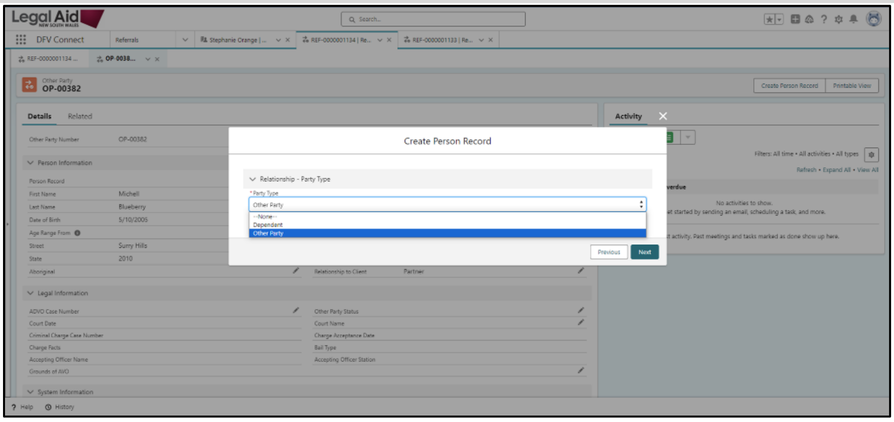
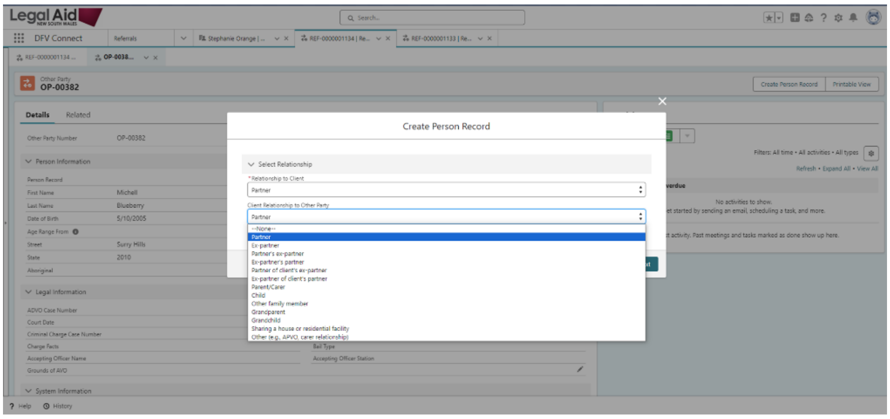
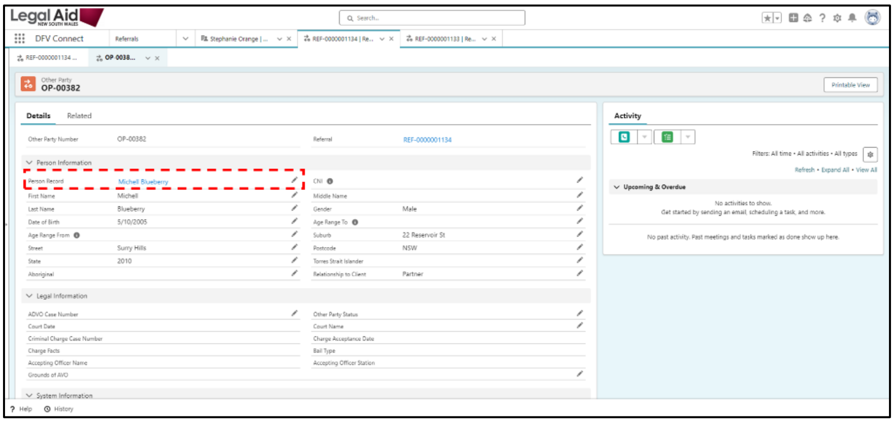
Once you have created a referral, you can add the Other Party details to record their information on the referral record.

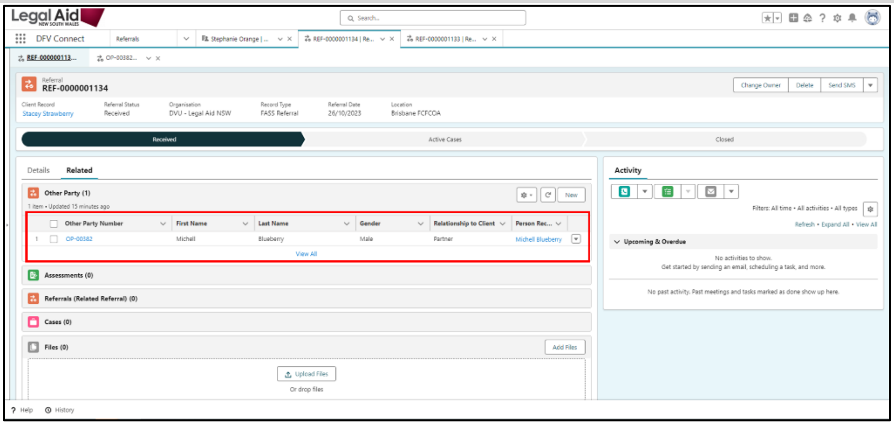
The other party person account must be created from the FASS referral record. You should always add the other party information to the referral and then create the person account once you have entered their information on the referral.

Step	Description
1.	To add the Other Party details, select the related tab on the referral. 
1.	Select **New** on the other party section.

Step	Description
	
2.	The other party component for the referral will appear. Check to see if there is already an other party person account, by searching their name in the person account field. • If the other party person account exists in the system, select person account so it is saved to the record. 
3.	Enter the other party details and save. 

Step	Description
4.	The other party information is now saved to the referral. While it has been opened in a separate tab, you can see the referral this information relates to by the referral number hyperlink. If there was no existing other party person account, you will need to link and create the other party person account to ensure the other party information is saved to the client’s person account, you can link and create a person account for the other party. To create the other party person account click on the create person record button. Note: all other party person accounts must be created from the referral record as this ensures that information is linked and contained properly. 
5.	A quick-action pop-up will appear Similar to creating the client person account, the information will be pre-populated. 
6.	You will need to select the type of person account as ‘other party’.

Step	Description
	
7.	Select the relevant relationships. 
8.	The other party person account has now been created and linked to the referral. To back to the referral record, you can click on the hyperlink or click on the referral number tab to the left. 
9.	You can now see the other party has been added to the referral and that it has linked to an other party person record account – indicated by the person record column. This would be blank if it hadn't been linked.

Step	Description
	

Create dependent child account

You can record details for your client's dependent children by adding the children's relationship to the client's person account. This process is referred to as 'creating a dependent child account' and can be located on the related tab of your client's person record.

This information may not be obtained when you initially speak with your client, but you can record their information at any time during supporting your client. It is best practice to confirm the dependent child's information before adding the relationship to the client account.

When you add the dependent children account as a relationship on the client's account, their person account will be linked to the client's person account as a 'related account'.

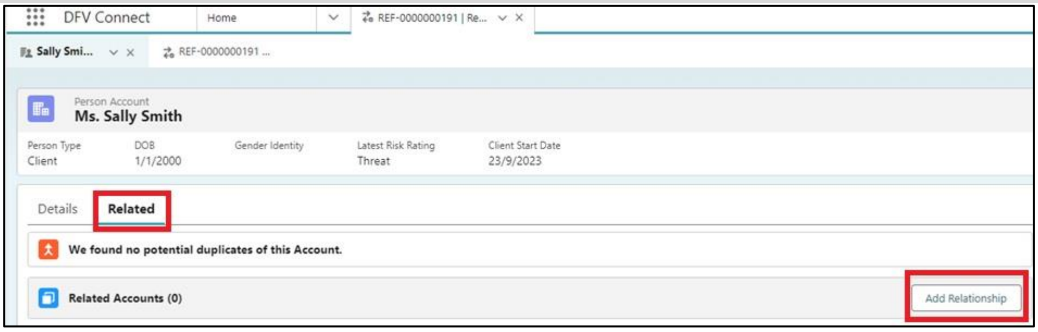
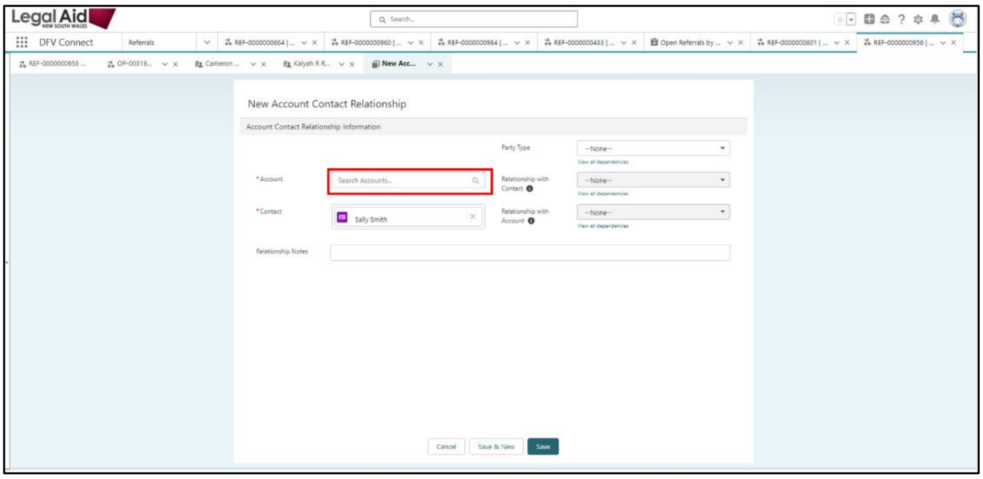
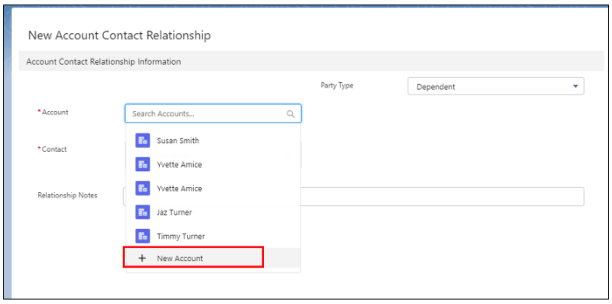
Practice rules

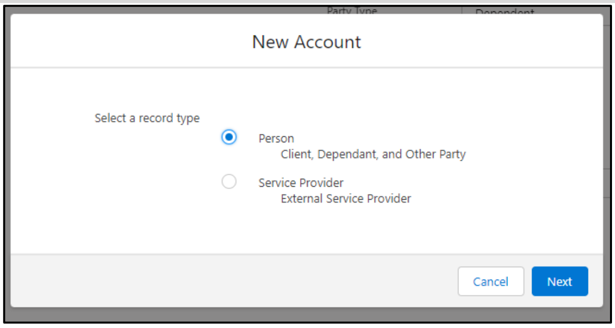
- Dependent Children are:
  - Children aged 16 and under
  - In the client's care (including children, who from time to time, reside with another parent or caregiver)

Process steps

Process steps

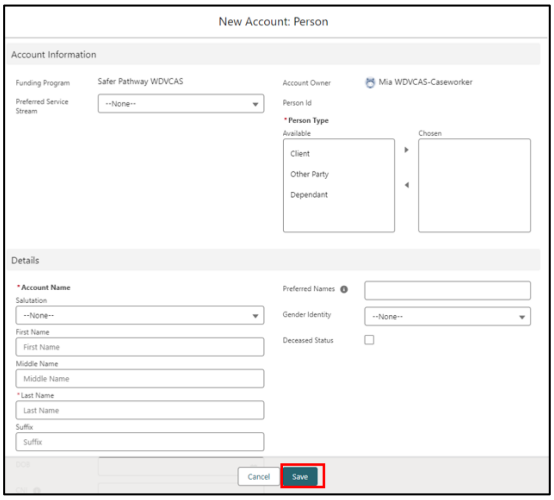
Step	Description
1.	From the Client Person Account, click on the **Related** tab. Click **Add Relationship**.

Step	Description
	
2.	The *New Account Contact Relationship* screen will be displayed. Search the dependent child's name to see if there is an existing account. 
3.	If the dependent child's person account already exists, you can select their account to add the relationship in the **Account** field. If they do not exist, select **+New Account** to create the dependent child's persona account. 
4.	The *New Account* screen will be displayed. Select **Person** record type and click on **Next**.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>


</td></tr>
<tr><td>5.</td><td>
The New Account: Person quick-action pop-up will be displayed. Complete the details as required:

Person type (Dependant)
Details (Name, DOB)
Demographics (Aboriginal or Torres Strait Islander)
Additional Information (including school/childcare details and where they reside)

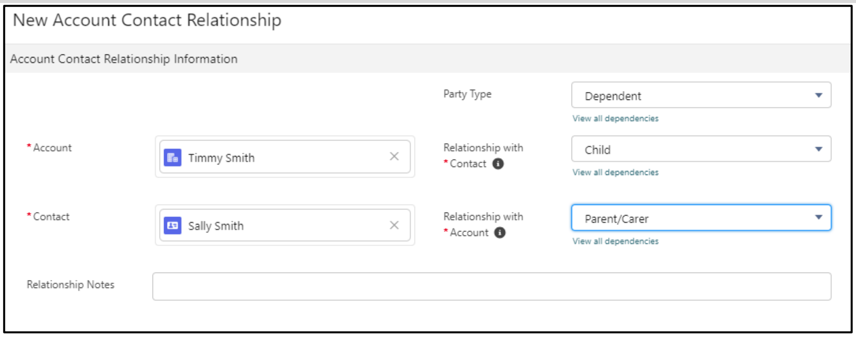
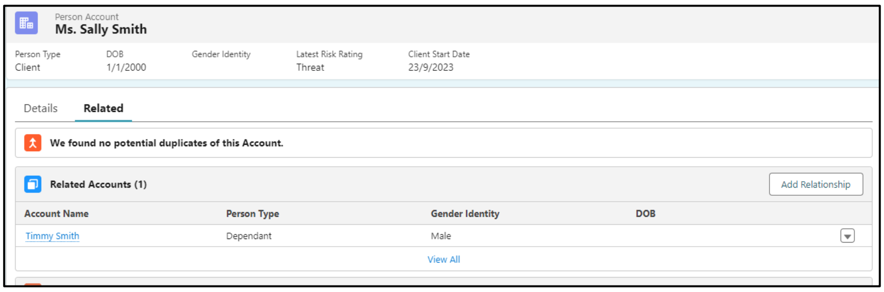
Select Save.


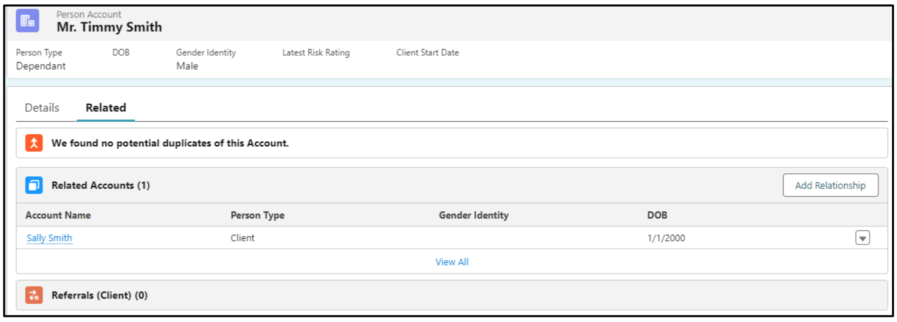
</td></tr>
<tr><td>6.</td><td>
You will be taken to the New Account Contact Relationship screen and the Dependent Account will be populated in the Account field.

Select the Dependents relationship with the Contact, and the Contacts Relationship with this Account (see below where Timmy Smith (Dependant Child Account) is the Child, and Sally Smith (Client Account) is the Parent or Carer.

Add Relationship Notes if required.

Select Save.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>7.</td><td>Once you have saved this information, the dependent child person account will appear in the Related Accounts section.


The client’s account will also be linked to the dependent child’s person account (see below example).

</td></tr>
</table>

Record client support

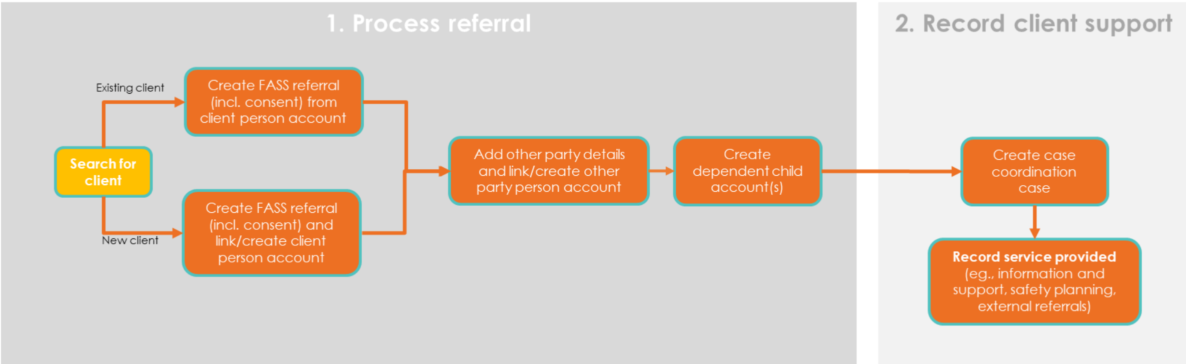
To record client support, you will:

1. Create a case coordination case and
2. Record services provided to clients using service events in the case coordination case created.

For process steps, see **clients and case coordination**.

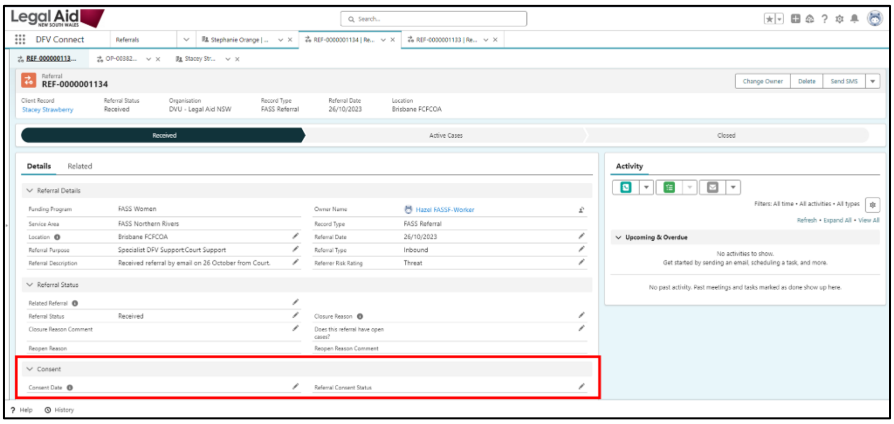
Clients and Case Coordination

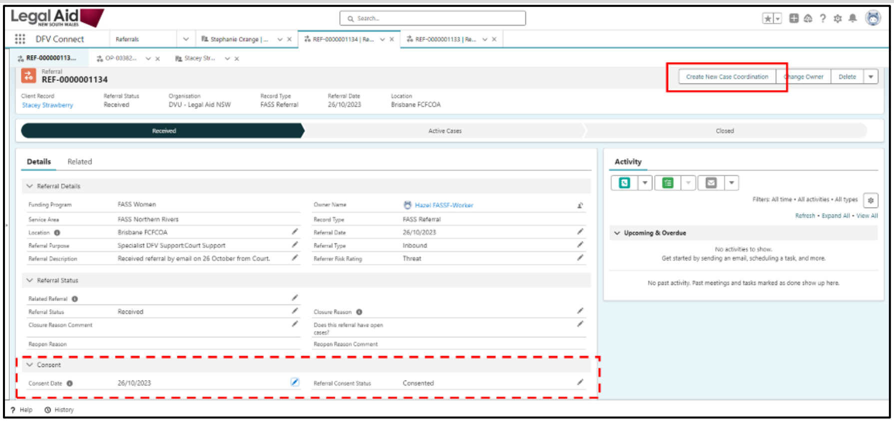
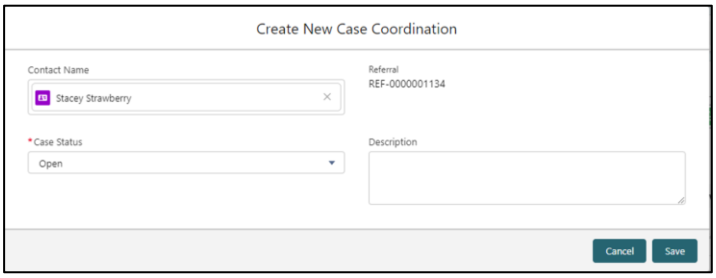
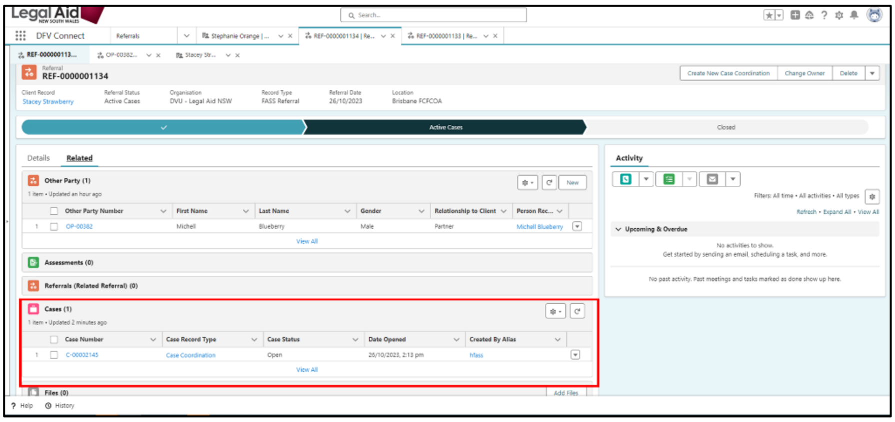
After you have created the Person Account and the Referral you can create a case coordination case.

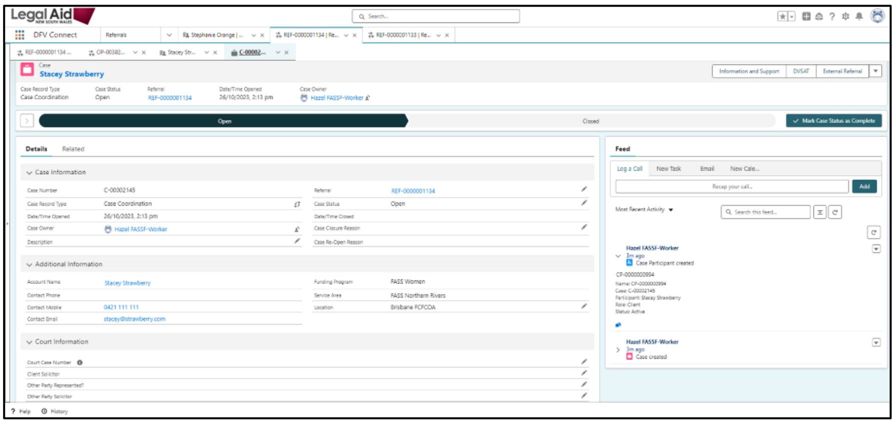


Create a case coordination case

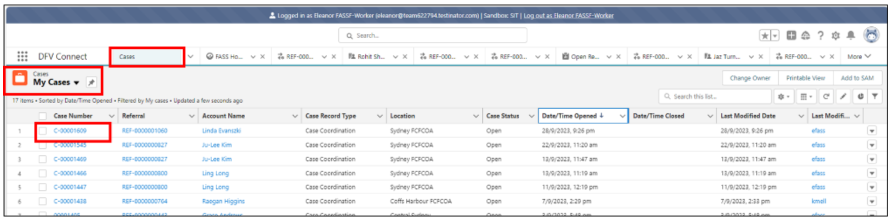
Pre-requisite to create a case is to receive and record consent from the client. If you have not done this when creating the referral, you can navigate to the referral, click a pencil to edit the referral, and enter a Consent Date and Status.

Step	Description
1.	Only once you record client consent you will be able to create case coordination case. Open referral and click on the edit (pencil) icon on the Consent area. 
2.	Now that we have recorded that the client has consented to providing support, the **Create New Case Coordination** button will appear on the referral record.

Step	Description
	
3.	The *Create New Case Coordination* pop-up screen will be displayed. The Contact Name, Referral, Case Status (will default to Open). You can change the status and date if you are recording this on a later day. Enter a **Description** (optional) and select the **Save** button. 
4.	The *Case "00000xxx" was created* pop-up will appear. Click on the *"00000xxx"* number on this pop-up to navigate to the Case.  Alternatively, if the pop-up disappears before you click on it, you can navigate to the Related tab and click on number under Cases. 

Step	Description
5.	The *Case* record will be displayed. You can now record Service Events such as Information and Support, Safety Planning etc. Click a **pencil** icon to edit the case details if required. 
6.	Make required changes and select the **Save** button.

View open cases

Step	Description
1.	Once you are logged on, from the **Main Menu** drop down, select **Cases**. Then from the List View drop down, select **My Open Cases**. The list of all cases you are owner will be displayed. To open the Case, simply click on the link. Click on the relevant Case Number to open it. 

Service events

Service events typically refers to an interaction or action related to providing service or support to a client. Service Event is a comprehensive record of all interactions and activities related to clients and are crucial for tracking client history ensuring the accountability and delivering consistent and effective service.

Case

Service Events/Functions

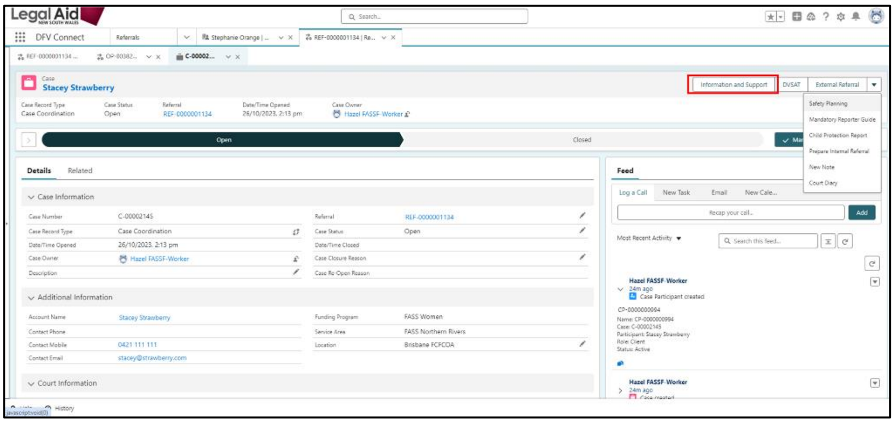
- Information and Support
- DVSAT
- External Referral
- Safety Planning
- Mandatory Reporter Guide
- Child Protection Report
- Prepare Internal Referral
- Case Management Assessment
- New Note (like a file note or post-it)

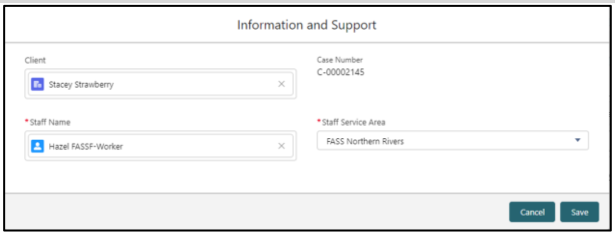
Information and support

The 'Information and Support' service event enables you to record the date, mode and write notes about information and support services provided to your client. As a FASS social support worker, you can use this service event to record:

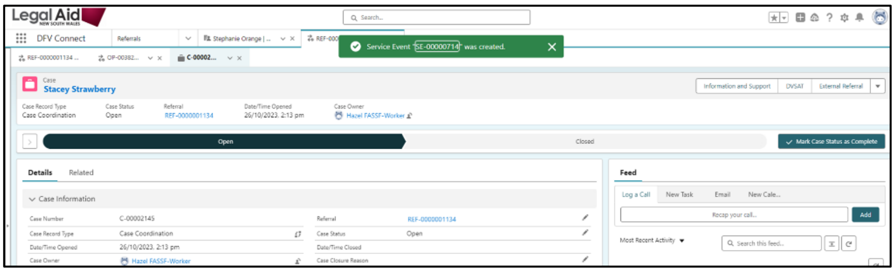
- Screening for social welfare issues provided
- Emotional support
- Information provided (including information about court).

Where information is provided, this must be recorded by following these steps:

Step	Description
1.	From the Case, click on **Information and Support** in the quick action bar (top menu). 
2.	The *Information and Support* pop-up screen will be displayed. The Client, Case Number, Staff Name (you) and the Staff Service area (your location) will be pre-populated. Click on the **Save** button.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>


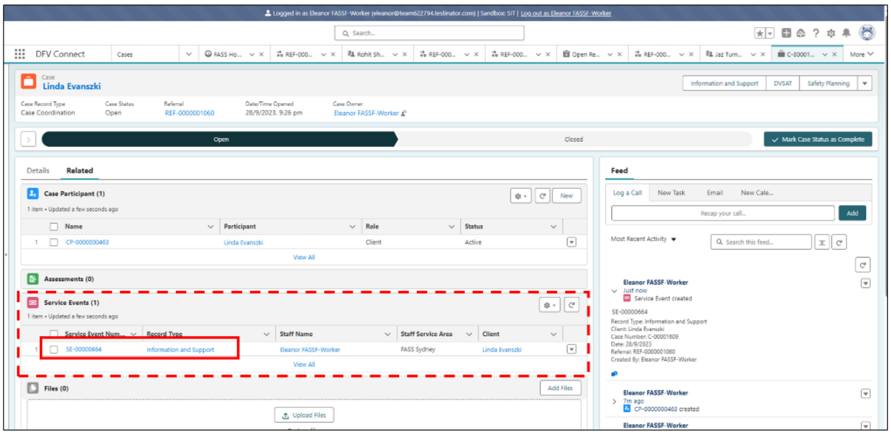
</td></tr>
<tr><td>3.</td><td>
The Service Event “SE-00000xxx” was created pop-up will appear.



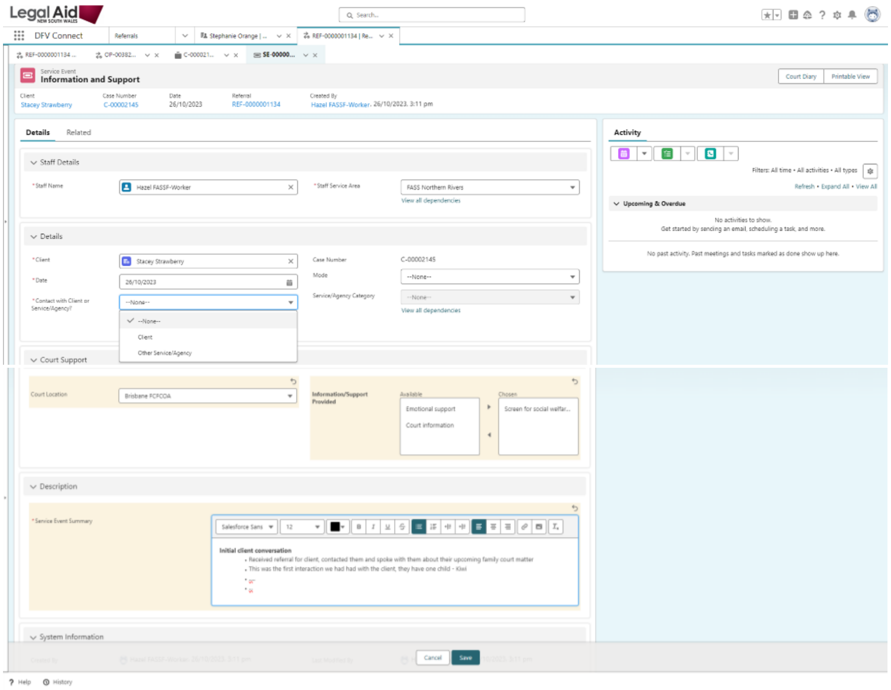
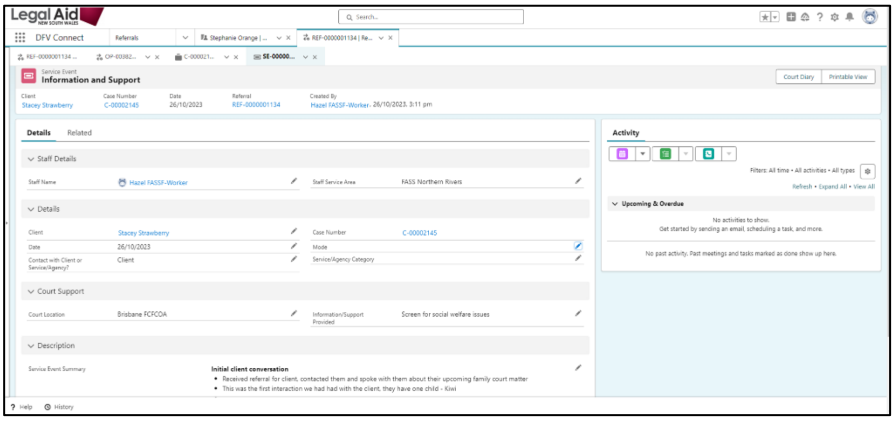
Click on the SE-000 number on this pop-up to navigate to the Service Event.

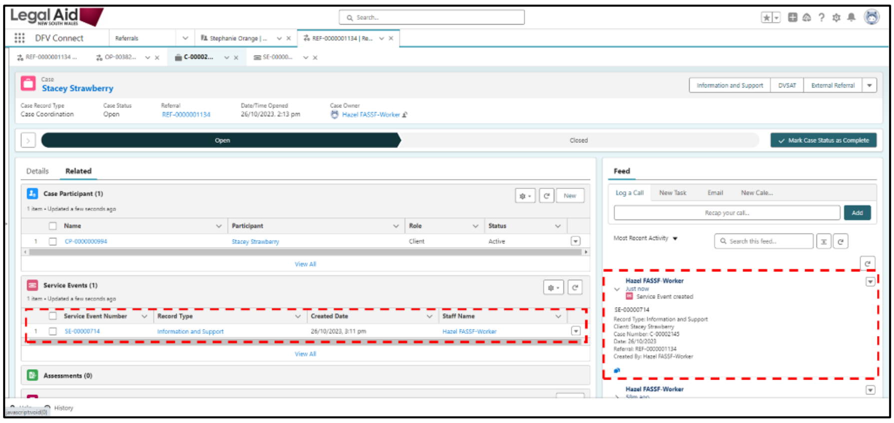
Alternatively, if the pop-up disappears before you click on it, you can click on the SE-000 number in the Feed on the right-hand side.

Or, you can find the Service Event on the Related tab of the case record, under the Service Events area.



</td></tr>
<tr><td>4.</td><td>The Service Event will open. Click a pencil icon to edit the details. Complete as many fields as you can.</td></tr>
</table>

Step	Description
	• Select one of the available options for **Contact with Client or Service/Agency**. • If you contacted a Service or Agency, you will also need to select a **Service/Agency Category** to assist with reporting. • Select the **Mode** of how you provided the information and support e.g. Telephone • Select the option that represents what type of **Information/Support** you provided (e.g. emotional Support, Court Information, Screen for social welfare). • Complete the **Service Event Summary** – Type in the Service Event Summary e.g., a description of what you provided. This a rich text area that will allows you to format your text (e.g., bold, bullet point,) with a character limit of 120,000 characters (approx. 4 x A4 size pages document). • Click **Save** 
5.	The Information and Support Service Event will be saved, and a record of the service provided to the client is available from the case. 

Step	Description
6.	The Service Event is available from the Case page, under the Related tab. It is also saved on the case feed activity. The feed will populate with all activity for the client. 

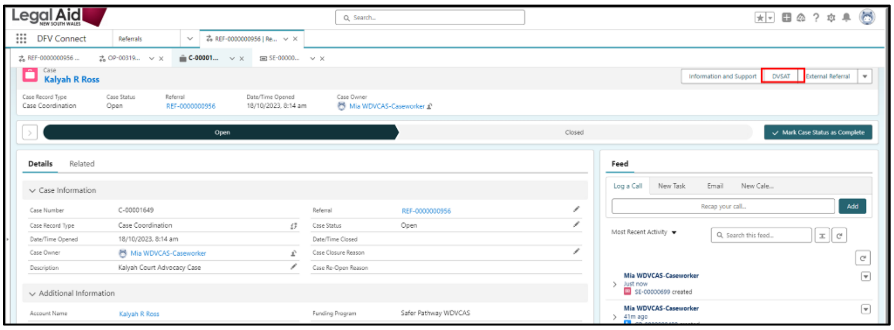
DVSAT

The Domestic Violence Safety Assessment Tool (DVSAT) is a standardised tool used for assessing the level of threat to people experiencing domestic and family violence. A person may be assessed as either ‘at threat’ or ‘at serious threat’ due to domestic and family violence through completion of the DVSAT.

FASS Social Support Staff may from time to time complete a DVSAT in DFV Connect.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>

From the Case, click on **DVSAT** in the quick action bar (top menu).



</td></tr>
<tr><td>2.</td><td>

The DVSAT *Part A: Risk identification checklist* will be displayed.

Answer all Part A questions by selecting Yes, No, Don’t Know or Don’t want to answer, and entering any additional Notes for each question.

Click **Next**

</td></tr>
<tr><td>3.</td><td>

The DVSAT *Part B: Professional Judgement* screen will be displayed.

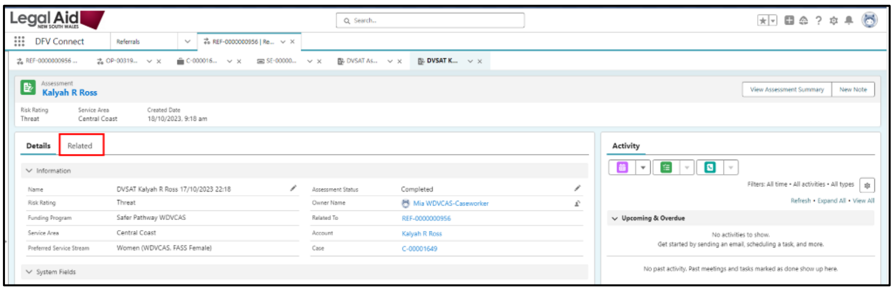
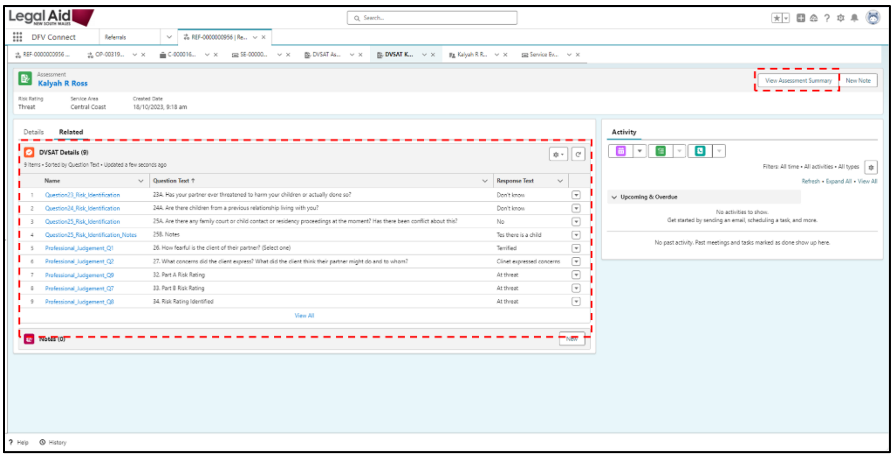
Answer the Part B Professional Judgement questions.

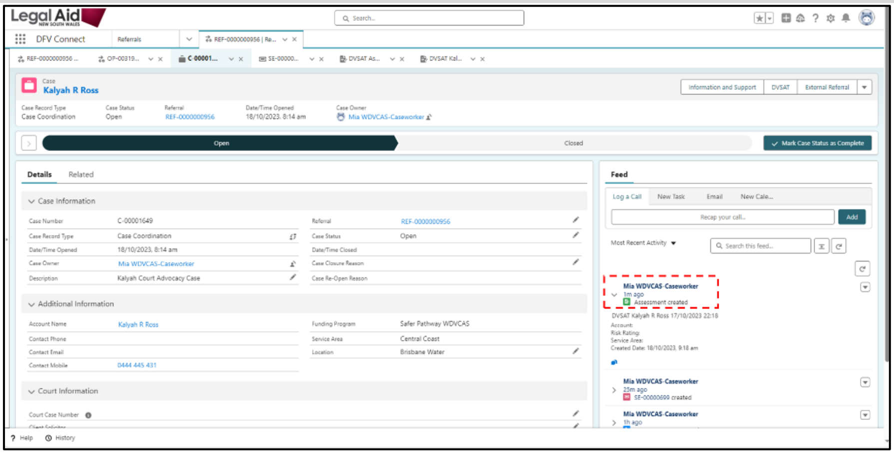
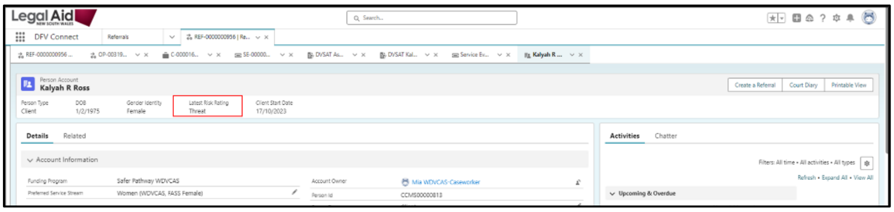
The Part A Risk Rating will be pre-populated based on the Part A answers.

Select a **Part B Risk Rating**

Select a **Risk Rating Identified** based on the highest rating from Part A and Part B i.e. if either are Serious Threat, then the overall Risk Rating should be Serious Threat. Please note that we have asked for an enhancement so that this is pre-populated with the option to edit it. Click **Submit**

</td></tr>
</table>

Step	Description
	
4.	The *Competed* page will be displayed. Click **Next** 
5.	Once you have submitted the DVSAT, your responses can be viewed on the related tab on the assessment. Click on the Related tab. 
6.	Viewing responses from the related tab is an easy way to view all the responses to the DVSAT questions, however you can also click on the ‘assessment summary’ button to view the DVSAT form. 
NOTE	If you navigate back to the Case you will see that the DVSAT will appear in the **Feed** and will also be available from the **Related** tab/**Assessments** area. You might need to refresh the page for it to appear here.

Step	Description
	 If you navigate back to the Person Account, the Latest Risk Rating will display this latest risk rating. 
	If the client is at serious threat, then you should make a referral to your local WDVCAS or LSS.

External referral

An external referral is used when sending the referral to any provider that it not using the DFV Connect system, e.g., a Family Support Service for counselling. This may be a warm or supported referral with the client's consent.

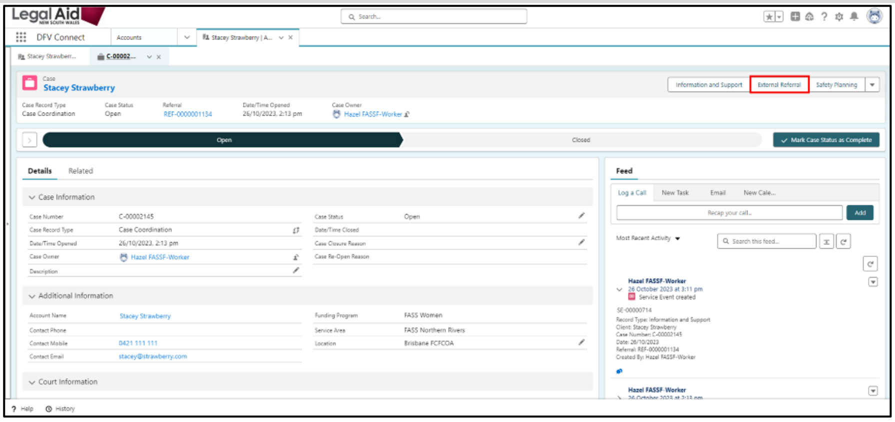
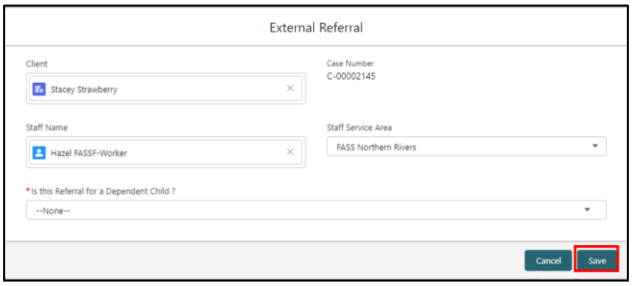
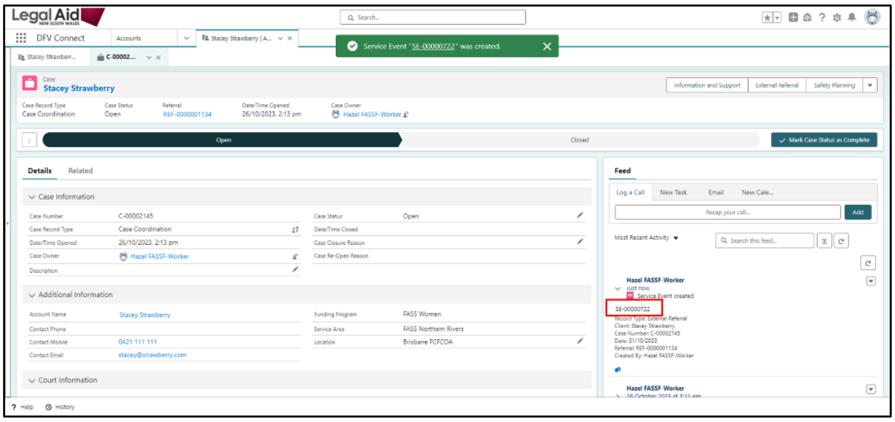
Practice rules

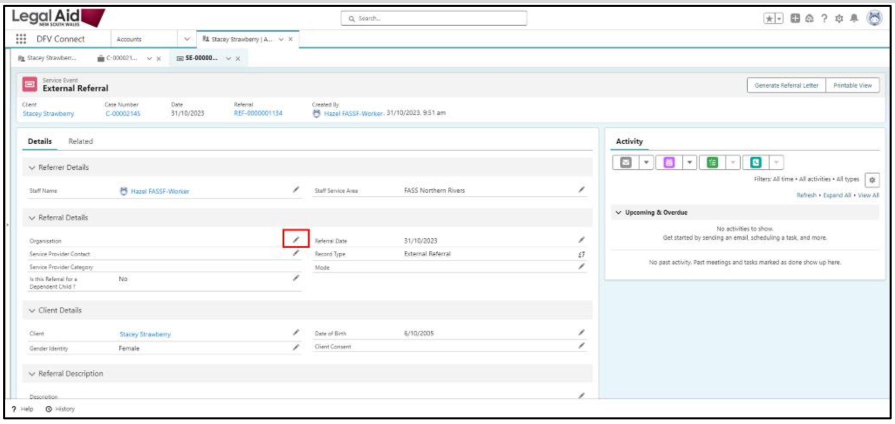
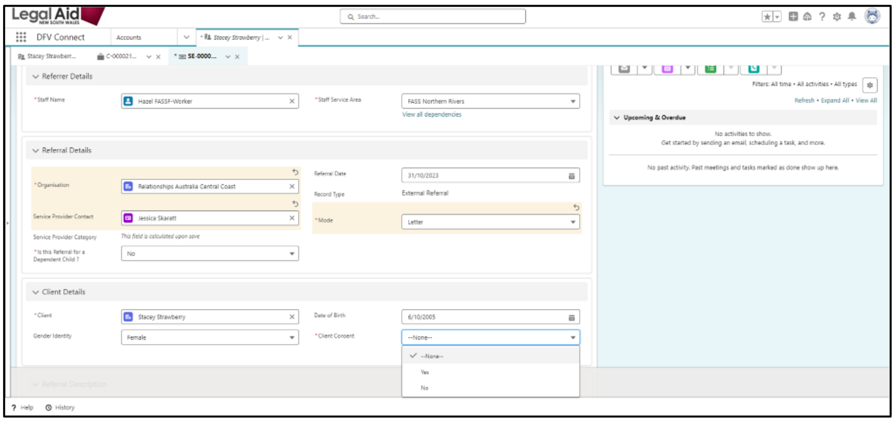
a. Obtain consent from the client to make an external referral on their behalf

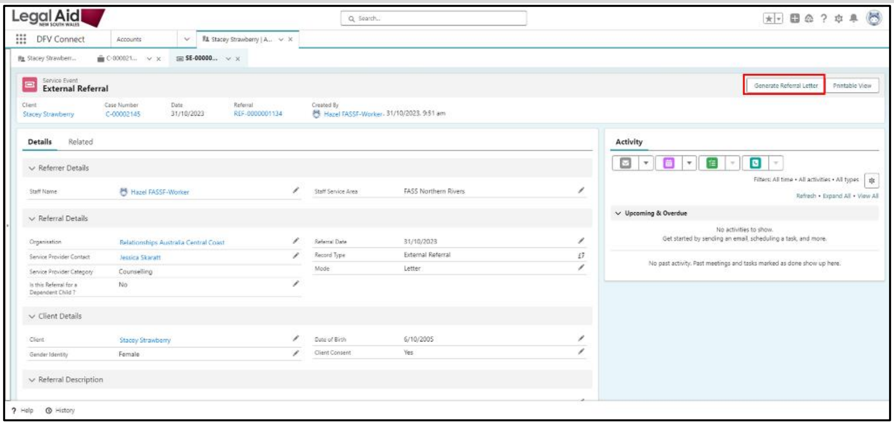
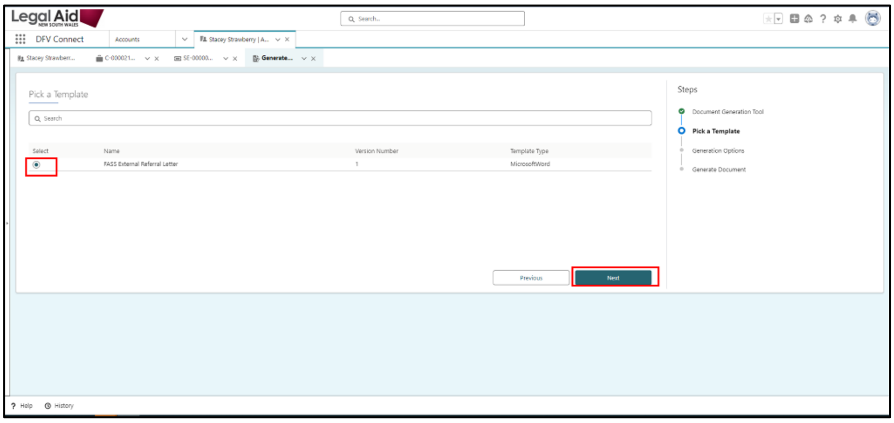
b. Create an external referral for each separate referral made for the client

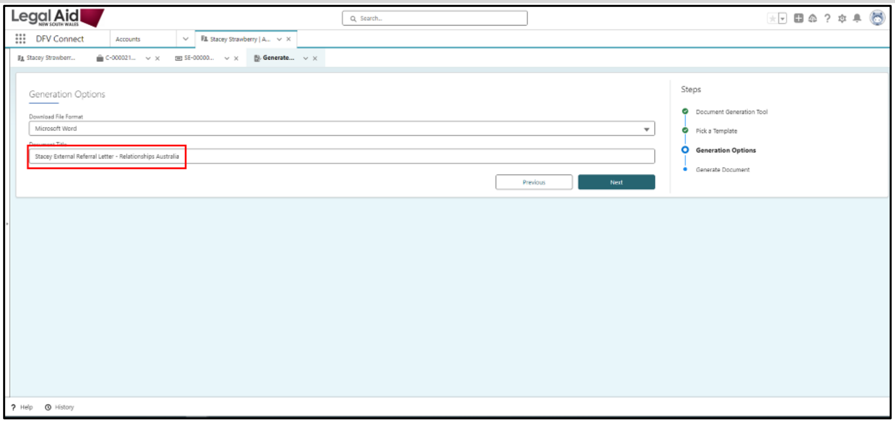
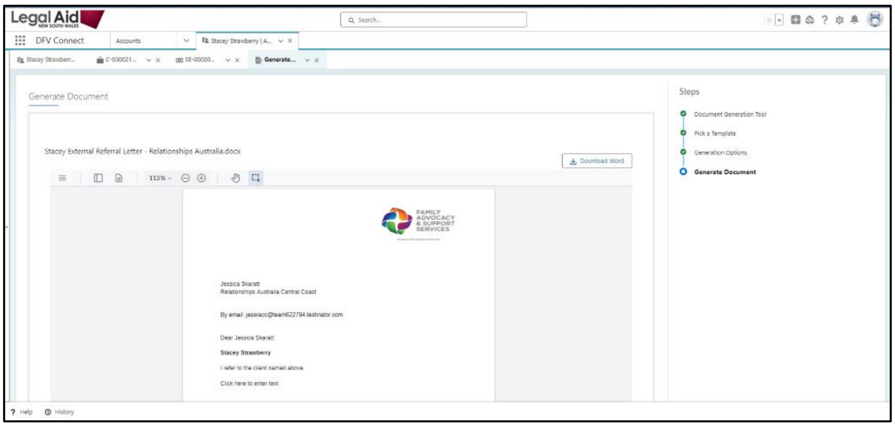
Process steps

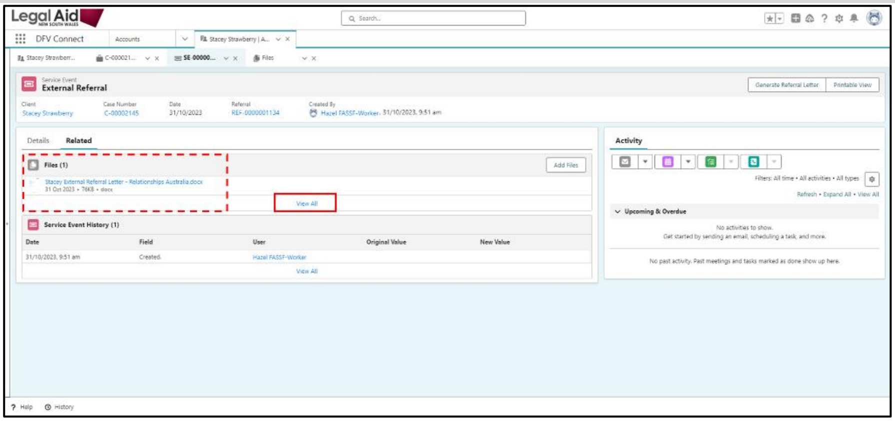
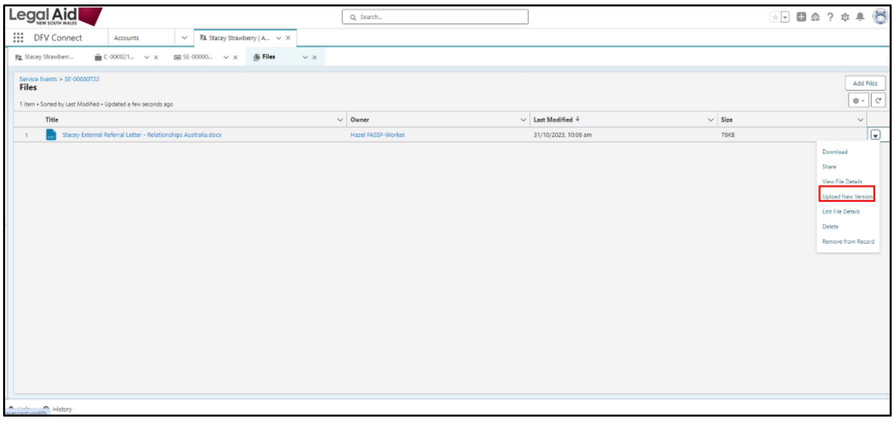
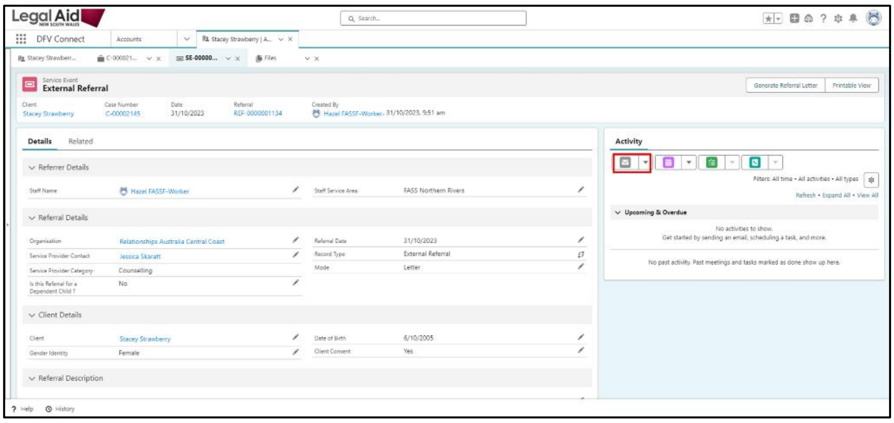
Step	Description
1.	From the Case record, click on **External Referral** in the quick action bar (top menu).

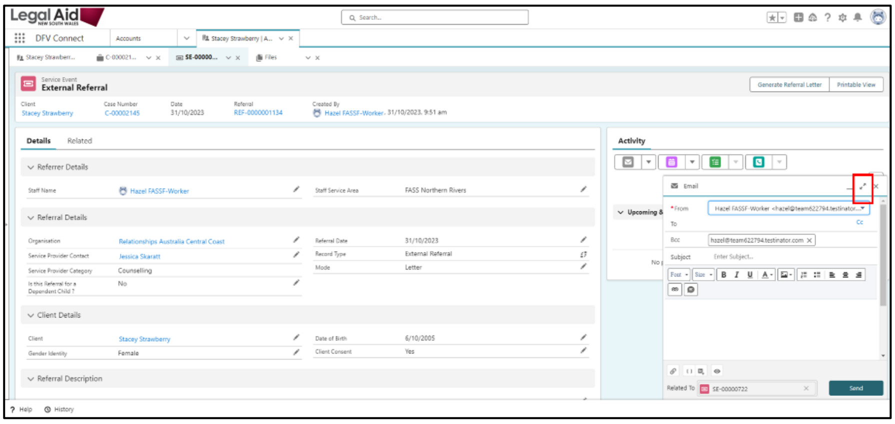
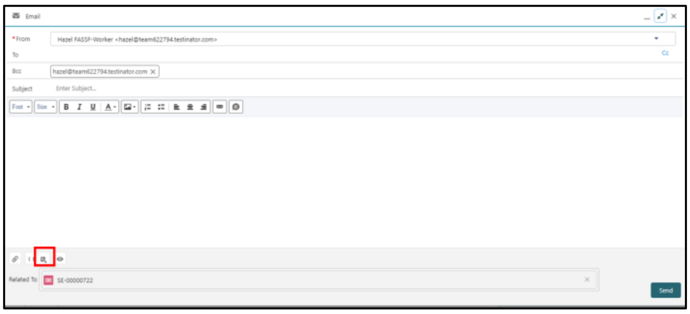
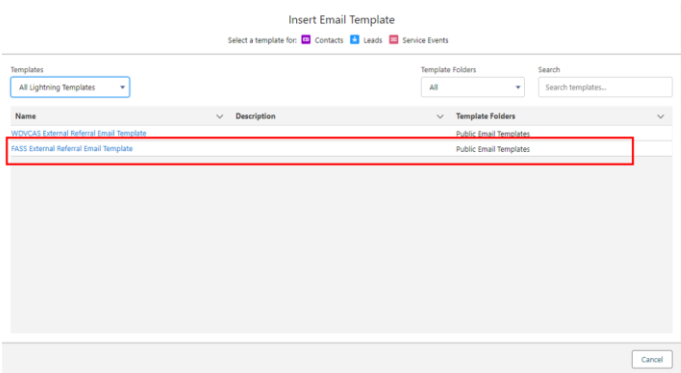
Step	Description
	
2.	The *External Referral* pop-up screen will be displayed. Select if this **Referral is for a Dependent Child** (Y/N). Click **Save** 
3.	The *Service Event "SE-00000xxx" was created* pop-up will appear on top of the screen. Click on the SE-000 number on this pop-up to navigate to the Service Event Alternatively, if the pop-up disappears before you click on it, you can click on the SE-000 number in the **Feed** on the right-hand side, or you can access it form the **Case Related** tab, under the Service Events area. 
4.	The Service Event will open. Click a pencil icon to edit the details.

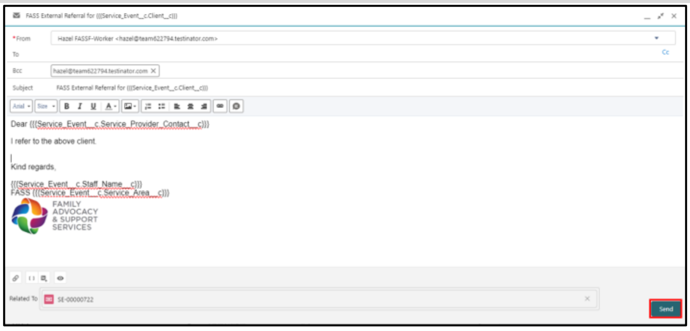
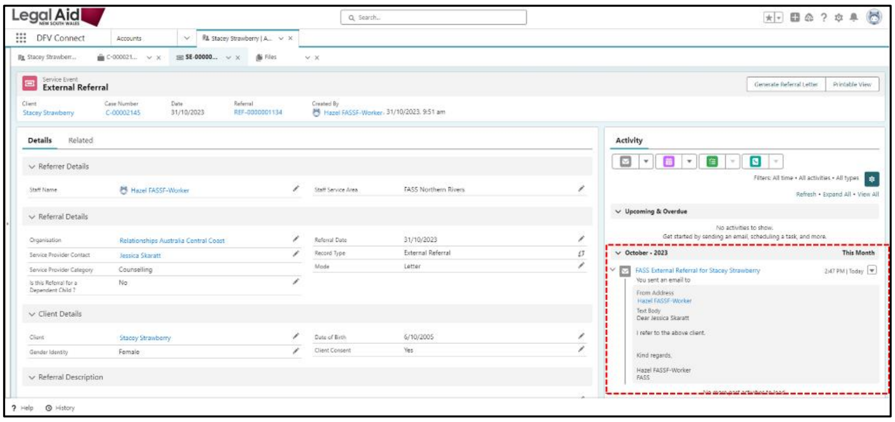
Step	Description
	
5.	Complete the fields in the **Referral Details** including the Organisation, Service Provider Contact, Referral Date, Mode (e.g. letter) Complete the **Client details** ensuring to record the Client Consent (mandatory) for this referral. Add **Referral Description** (mandatory) and select **Save** button. 
6.	The information recorded on the service event (including contact, external provider account and email) will automatically populate onto the letter (If your service provider prefers sending referral letters). Select **Generate Referral Letter** button.

Step	Description
	
7.	The *Document Generation Tool* screen will be displayed. Click on **Generate Document** 
8.	The Pick a Template screen will display. Select the **FASS External Referral Letter** and select the **Next** button. 
9.	The *Generation Options* screen will display. Select the **Downloaded File Format** (Word or PDF). Provide a **Document Title.** Click **Next**

Step	Description
	
10.	The Document will be generated. The information recorded on the service event (including contact, external provider account and email) will automatically populate onto the letter. Please ensure that all details you want to be included in the letter are in the system, so you do not have to edit the contact information again. The generated, un-edited letter automatically saves to the service event. • To make edits to the letter, you will need to download the letter (Download Word) Close the Generate Letter tab. 
11.	The original unedited file will automatically be saved in the Service Event. Click on the **Related** Tab and you can see that it appears under **Files**. If you have made changes to your local version, upload the new version by selecting the View All**.**

Step	Description
	
12.	To upload a new version of the file (if you have downloaded the Word document click on the drop-down menu and select **Upload New Version**. 
13.	Find the new version of the generated letter and select OK. The new version of the document will be uploaded.
14.	You can also send an email to an external referral service provider from DFV Connect External Referral. Open an external referral and select the Email icon in the Activity area. 

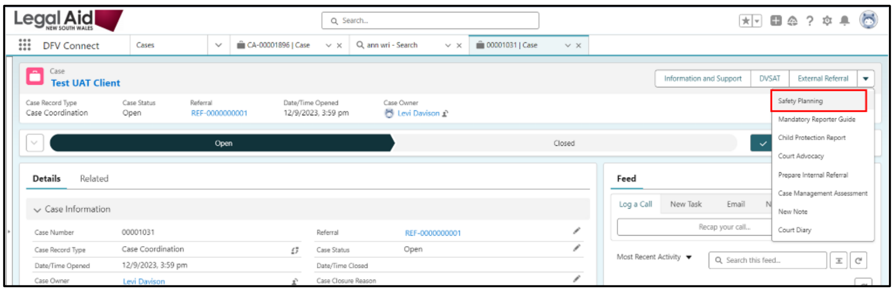
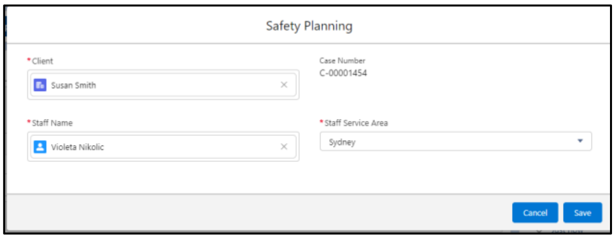
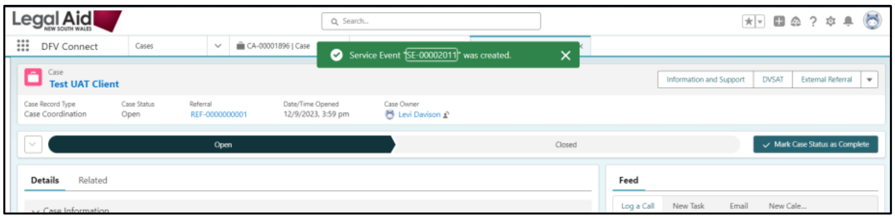
Step	Description
15.	The email window will be displayed in the bottom right corner. To expand the window, click on the “maximise” arrows. 
16.	The email window will be expanded. To generate an email template, you can click on the template hyperlink in the bottom left-hand corner of the emails and select the relevant template. 
17.	Select Insert Template and select the FASS External Referral Email template. 
18.	The email template will be displayed in the email body. Please note the information in brackets automatically populates after sending the email. You can type all details of your referral in the email body and send.

Step	Description
	
19.	The details that the email was sent will appear on the Activity timeline. 
20.	The provider will receive the email from noreply@salesforce.com on behalf of the user. 

Safety planning

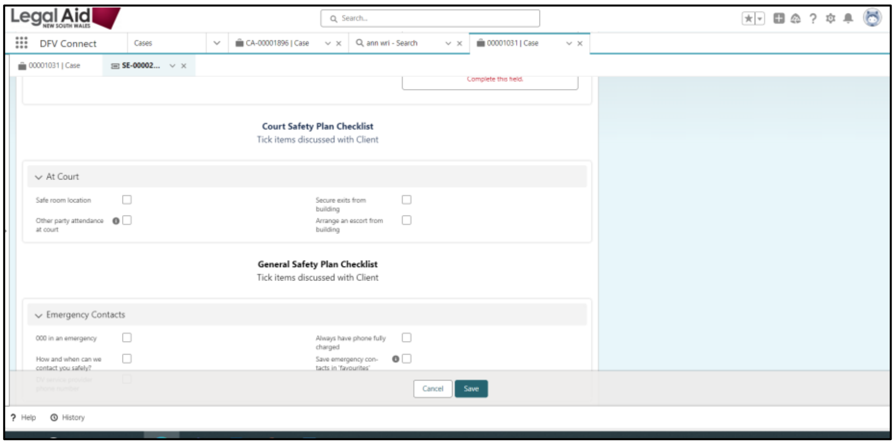
FASSs should seek to address clients' immediate safety needs when first speaking with them. This checklist can be used to help guide your conversation and remind you of some critical discussion points.

Process steps

Step	Description
1.	From the Case, click on **Safety Planning** in the quick action bar (top menu). 
2.	The *Safety Planning* pop-up screen will be displayed. The Client, Case Number, Staff Name (you) and the Staff Service area (your location) will be pre-populated. Click on the **Save** button. 
3.	The *Service Event "SE-00000xxx" was created* pop-up will appear.  Click on the SE-000 number on this pop-up to navigate to the Service Event Alternatively, if the pop-up disappears before you click on it, you can click on the SE-000 number in the **Feed** on the right-hand side, or you can access it form the **Case Related** tab, under the Service Events area.
4.	The *Service Event* will open. Click a **pencil** icon to edit the details. There are no additional mandatory fields, so complete the relevant fields to ensure we have a record of your discussion.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>
In the Details section:

Enter the Location of Safety Concerns – At Court, in General, or both
Type in a general description of the Service Event Summary
Select the Mode of your conversation, e.g. Telephone

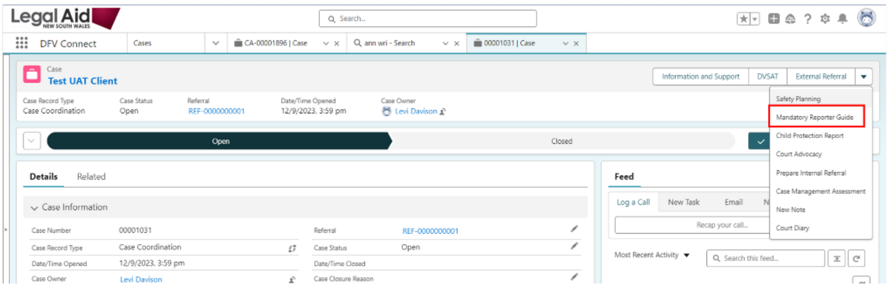
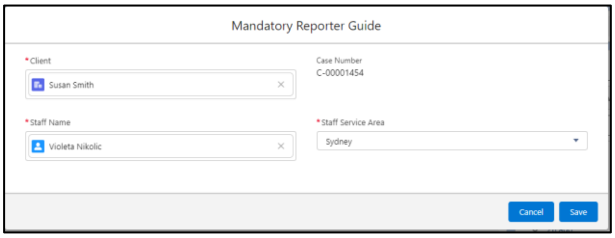
If you discussed ways to remain safe during Court, complete the Court Safety Plan Checklist.
In the General Safety Plan Checklist, tick the items that you discussed with the client. The items are grouped into Emergency Contacts, Safety Bag, Staying Safe at Home, and Preparing to Leave.
Click on the Save button.


</td></tr>
</table>

Mandatory reporter guide (MRG)

After you report on an MRG on the website (as you may currently do from time to time), you will record this in the system as a service event. This action is used to have a record that the MRG is completed.

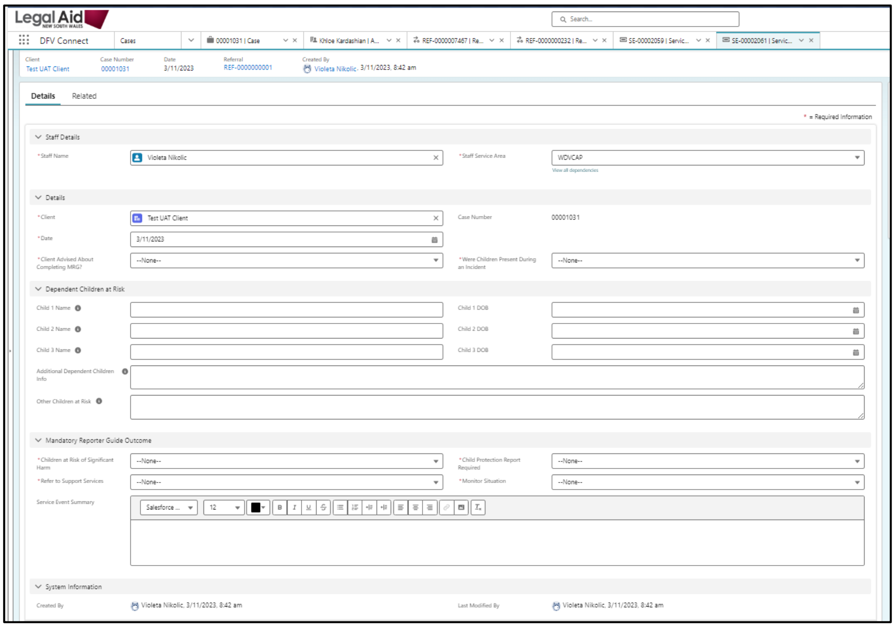
Process steps

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>From the Case, click on Mandatory Reporter Guide in the quick action bar (top menu).

</td></tr>
<tr><td>2.</td><td>The Mandatory Report Guide pop-up screen will be displayed. The Client, Case Number, Staff Name (you) and the Staff Service area (your location) will be pre-populated. Click Save.

</td></tr>
<tr><td>3.</td><td>The Service Event “SE-00000xxx” was created pop-up will be displayed.

Click on the SE-000 number on this pop-up to navigate to the Service Event

Alternatively, if the pop-up disappears before you click on it, you can click on the SE-000 number in the Feed on the right-hand side, or you can access it form the Case Related tab, under the Service Events area.</td></tr>
<tr><td>4.</td><td>The Service Event will open. Click a pencil icon to edit the details.

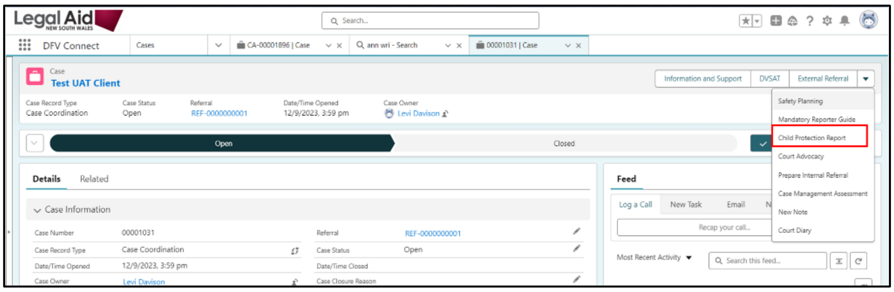
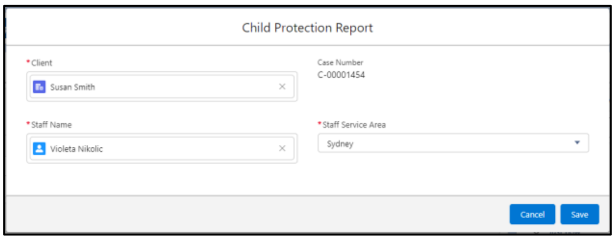
In the Details section:
Select if the Client Advised About Completing MRG? Yes or No
Select if there Were Children Present During the Incident? Yes, No, Unknown or Refused to say
If Dependent Children are at Risk, enter:
Child Name and Date of Birth – up to 3 children can be recorded
Additional Dependent Children Information</td></tr>
</table>

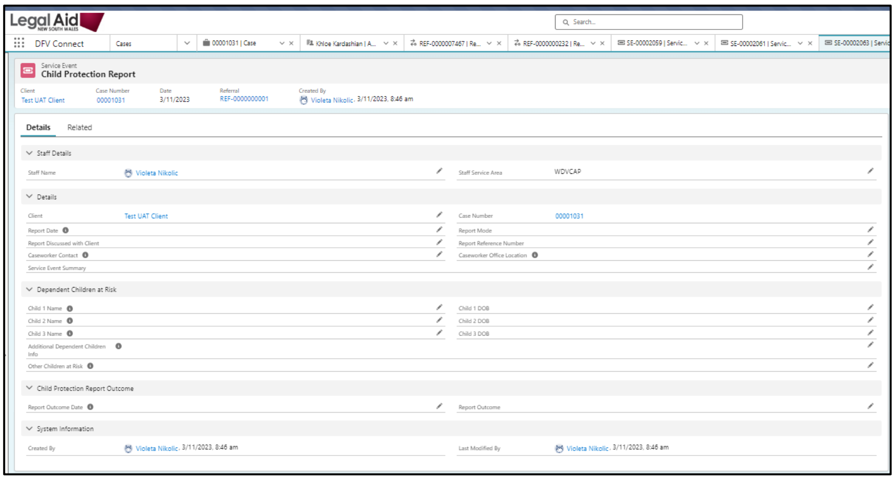
Step	Description
	• **Other Children at Risk** – free text field In the Mandatory Reporter Guide Outcome section select: • **Child Protection Report Required?** Yes or No • **Monitor Situation** Yes or No • **Refer to Support Services** Yes or No • Type in a **Service Event Summary** (free text) Click **Save** 
5.	You can access the Service Event at any time from the **Related** tab of a **Case** record. The **Feed** shows the basic information of the event and you can also access it from here, but this shows a chronological feed of all service events and activities actioned under the case record.

Child protection report

FASSs are required by law to report suspected child abuse and neglect to government authorities.

Process steps

Step	Description
1.	From the Case, click on **Child Protection Report** in the quick action bar (top menu). 
2.	The *Child Protection Report* pop-up screen will be displayed. The Client, Case Number, Staff Name (you) and the Staff Service area (your location) will be pre-populated. Click **Save.** 
3.	The *Service Event "SE-00000xxx" was created* pop-up will be displayed. Click on the SE-000 number on this pop-up to navigate to the Service Event Alternatively, if the pop-up disappears before you click on it, you can click on the SE-000 number in the **Feed** on the right-hand side, or you can access it form the **Case Related** tab, under the Service Events area.
4.	The *Service Event* will open. Click a **pencil** icon to edit the details. In the Details section: • Select the **Mode** of the discussion • Select if **Report Discussed with Client?** Yes or No • Enter the Report Reference Number • Enter the **Contact Person** i.e. the Child Protection Worker • Enter the **Contact Person Location** In the Dependent Children at Risk Section enter the: • **Child Name and Date of Birth** – up to 3 children can be recorded here

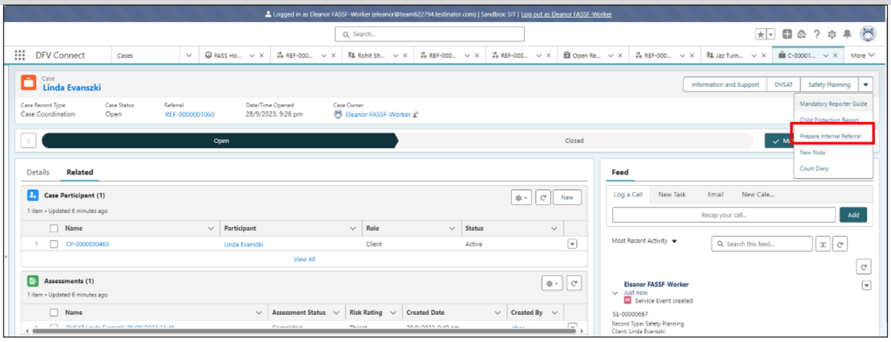
Step	Description
	• **Additional Dependent Children Information** • **Other Children at Risk** – free text field In the Child Protection Outcome section: • Enter the date the report was received in the **Report Outcome Date** • Select the **Report Outcome** – Allocated or Not at risk of significant harm Click **Save** 
5.	You can access the Service Event at any time from the **Related** tab of a **Case** record. The **Feed** shows the basic information of the event and you can also access it from here, but this shows a chronological feed of all service events and activities actioned under the case record.

Prepare Internal Referral

Internal referrals are referrals made internally through DFV Connect by DFV Connect users, for example, referrals made from one FASS Social Support Service to another FASS Social Support Service or to a WDVCAS.

Process steps

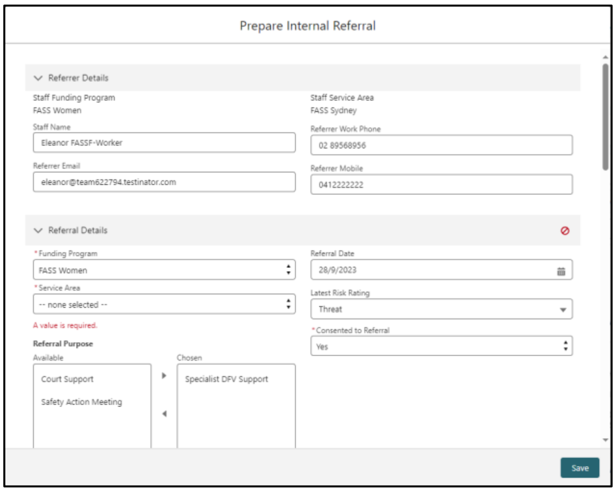
Step	Description
1.	From the Case, click on **Prepare Internal Referral** in the quick action bar (top menu).

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td></td></tr>
<tr><td>2.</td><td>

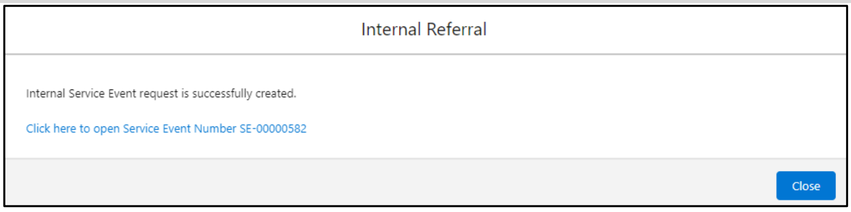
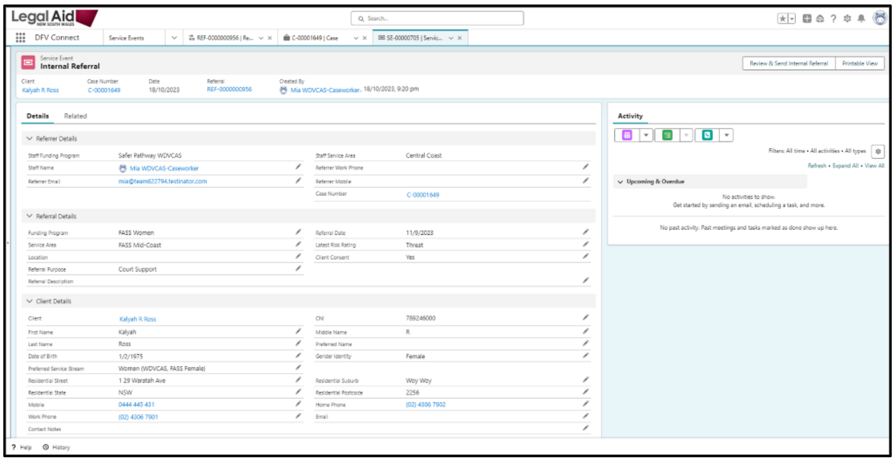
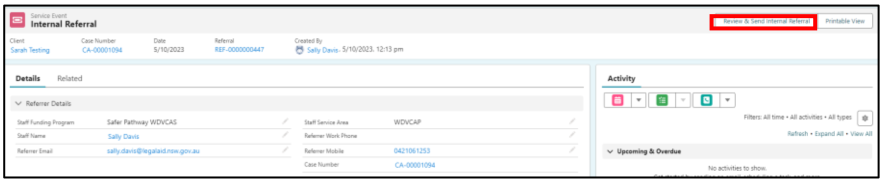
The **Prepare Internal Referral** pop-up screen will be displayed. This form displays information from the original referral as well as the client person record. Enter information for:

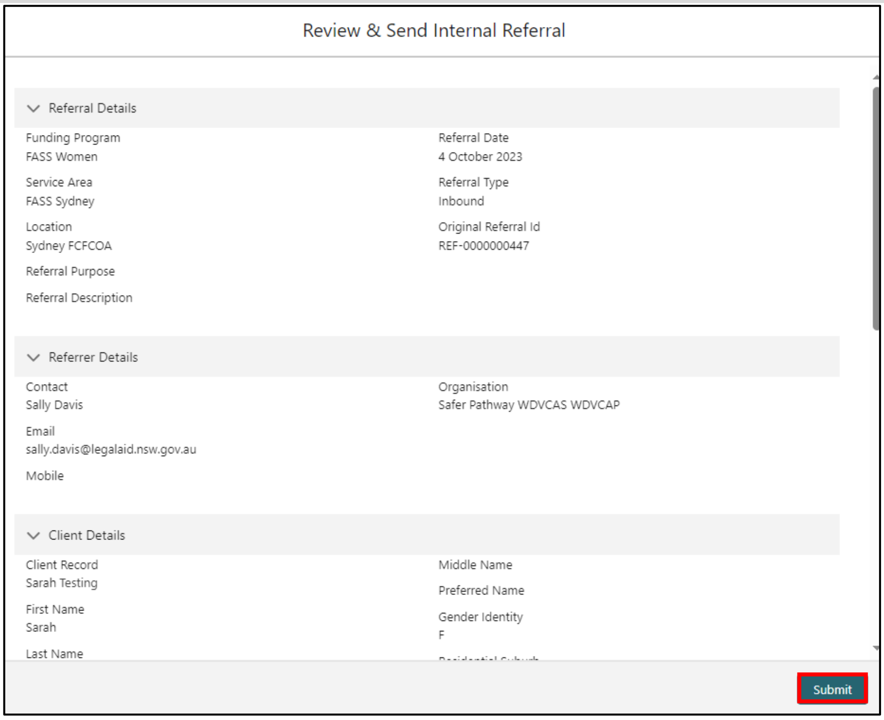
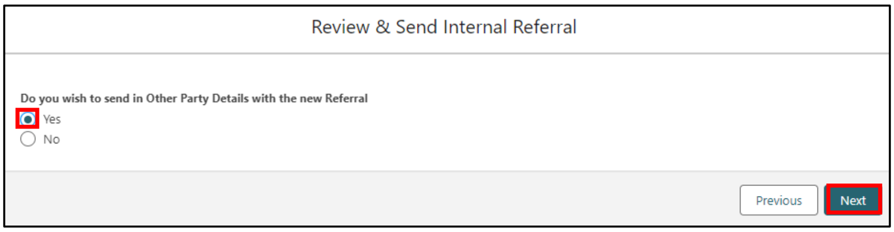
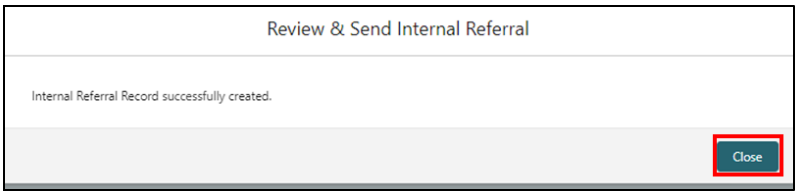
- **Referrer Details** – some fields will be prepopulated, your email and staff name, complete Work, and mobile number
- **Referral Details** – Funding Program, Referral Date. Referral Purpose, Latest Risk Rating, Consented to Referral, Referral Description
- **Client Details and Client Demographics** – data in these sections will be pre-populated, however you have the ability to add additional details that may be useful – Gender Identity, Contact Note, Disability Details, Aboriginality, Torres Strait Islander, Interpreter Required, LGBTQIA+, Dependent Child Information, Country of Birth
- Make sure you complete **Consented to Referral** field, otherwise you will not be able to save the referral.

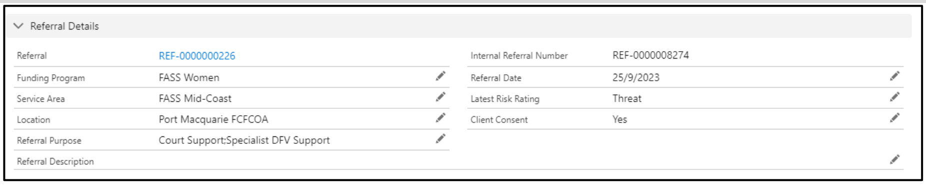
Once all fields are completed, select the **Save** button.



</td></tr>
<tr><td>3.</td><td>Click on the Service Event link to open it</td></tr>
</table>

Step	Description
	
4.	The Service Event screen will be displayed. Click on the edit (pencil) icon to add any additional information required for the referral. If required, click on the **Related Tab** and **Upload Files** that may assist the provider. 
6.	When ready (all information populated and if required, added any additional files), click on the **Review and Send Internal Referral** 
7.	The *Review & Send Internal Referral* screen will be displayed. Confirm the details are correct then click **Submit**

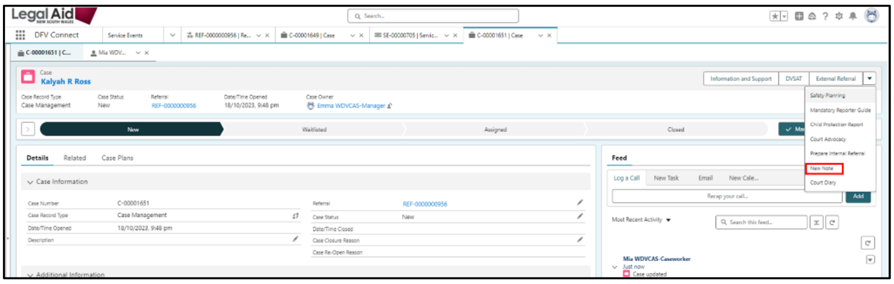
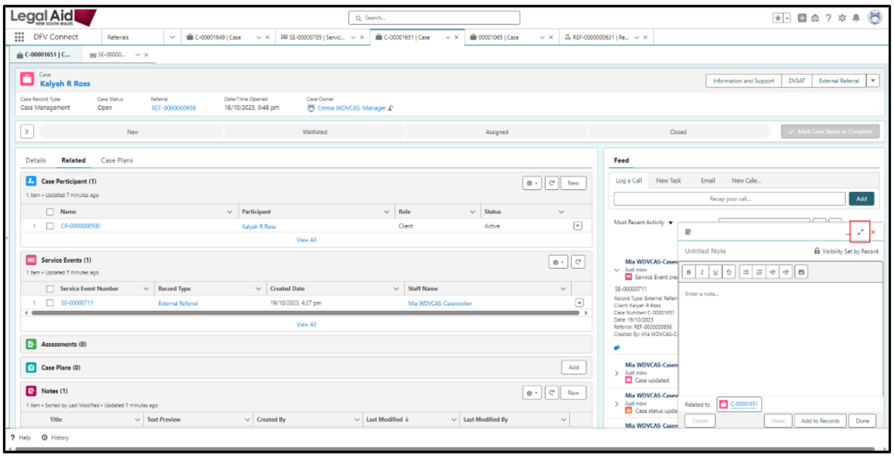
Step	Description
	
8.	An additional prompt will display to confirm that you wish to send Other Party Details with the referral. Click the radio button **Yes** to send the Other Party details, then click **Next**. 
9.	After you have clicked on this button, the button will disappear, and you will not have the option to send again from this referral. This ensures you are not sending the referral more than once. 
10.	Once submitted, the **referral number** field on the internal referral service event will populate with the internal referral number created.

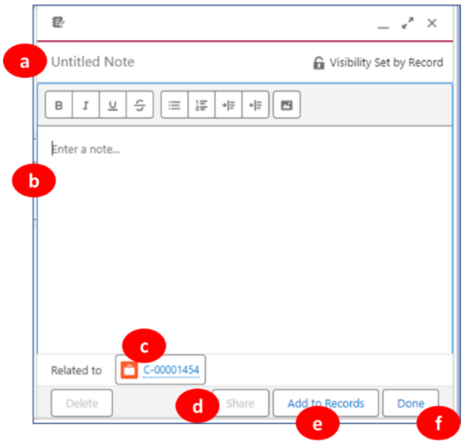
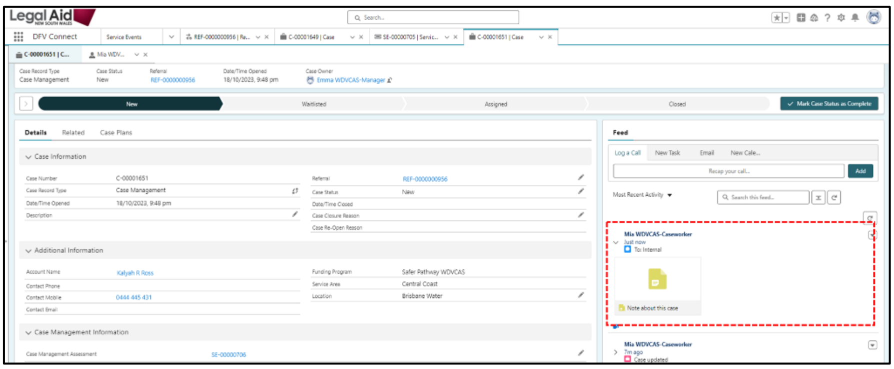
Step	Description
	

Notes

The ‘New Note’ function enables you to record notes and save them to your client’s case coordination case. This function does not record services provided to your client that can be reported on. If you want to ensure your services are properly recorded, please use a service event function.

You may prefer to use this note function to record a conversation with your client and later document this information in relevant service events (e.g., information and support).

Step	Description
1.	From the Case or Case Plan, click on **New Note** in the quick action bar (top menu). 
2.	The *Note* pop-up screen will display in the bottom right-hand corner of the screen. To expand the window, click on the “maximise” arrows. 
3.	The *Note* pop-up screen will be displayed. Use the expand (top right corner) to make the note area bigger. a) Enter the note **title**. When naming a note choose a title that accurately reflects the content and purpose of the note. The title should accurately represent the content, be concise but descriptive, making it easy for anyone reviewing to understand its context and relevance (the location of the client file prior to DFV Connect is in XYZ) b) Enter the **text** of the note. You can format the text using the formatting buttons (Bold, Italics, Underlines, Strikethrough, Bullet list, Numbered list, Indent, outdent) or add an Image up to 1MB.

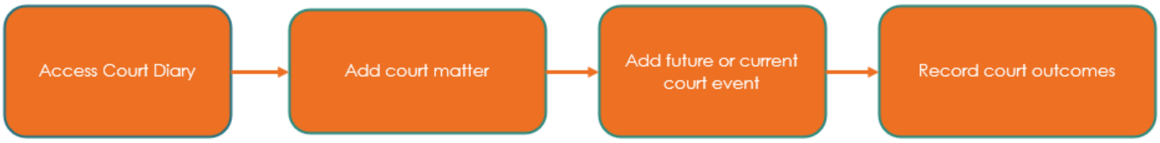
Step	Description
	c) The Case or Case plan record related to the note will be pre-populated and should not be changed. d) **Optional**: Click **Share** to select a specific person (another DFV Connect user) you want to share this note with. e) **Optional**: Click **Add to Records** to add the same note to additional cases or case plans. Note that while you can select a person or referral, you cannot share the same note at the person account or referral level – the notes are not visible from these records as there was concern over information sharing rules in this area. f) When entered all information select the **Done** button. 
NOTE	These notes will be visible by workers in your Service Area, as they also have access to the Case or Case Plan. Workers outside of your Service Area will not see the Note, Case or Case Plan, but they will have access to the referral and client data.  Your new note can be access from this Related tab in the Note section, and if you created the note, you can edit if from here.

Court diary (court events and outcomes)

Description

The Court diary function can be accessed from your client's account, referral, and case coordination case. The Court Diary enables you to record your client's court matter, court events, outcomes, and your client's attendance.

The court diary is a useful way to gather information about your client's court matter(s) and can assist with reporting requirements.



Terminology	
Court matter	Client's court matter. A new court matter should be created depending on each of the client's court matters.
Court events	Refers to the court listings and/or other related court events including Mentions, Interim and Final Hearings and Child Impact Reports.
Court event order outcome	Refers to the outcome for the specific event entered

Practice rules

a. Enter court matter details on an existing client in the 'Court Matter' section of the Court Diary. Further details about the court matter can be recorded in the **'Matter Description'** section.
b. After a matter has been heard, you can record the relevant court event outcomes and information about orders made by creating a 'New Court Event.'
c. In the **'Notes'** section of the Court Event, you can record further information about the court event e.g., matter outcome.
d. The Court Dairy only has the function to be able to record the court location/s to your Service Area (i.e., FASS FCFCOA Registry). If the client has a court matter listed at another court location (outside your Service Area) and you wish to record the details of this court matter, then you may record the details of the court matter (e.g., court location) in the 'Notes' section in the Court Event.
e. In the system you can capture information in the New Court Event section, as a drop-down option.
f. To capture the adjourned date for the court matter, you will need to record the adjourned date in a new court event. It is best practice to record the Court Event Date, Court Event Type and Court Event Location. In the 'Notes' section for this court event you can also record information about the next court date e.g., client is required to attend court, will be bringing a support person, requires an interpreter etc.

Example scenarios

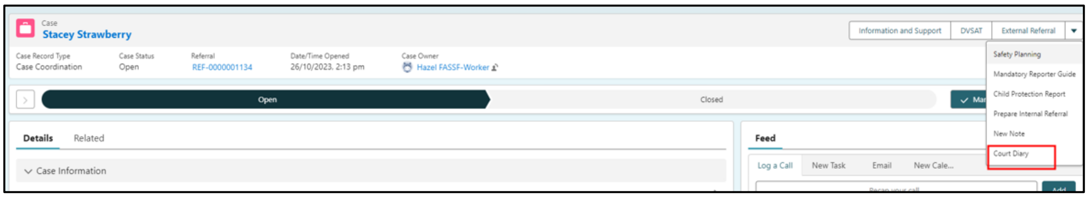
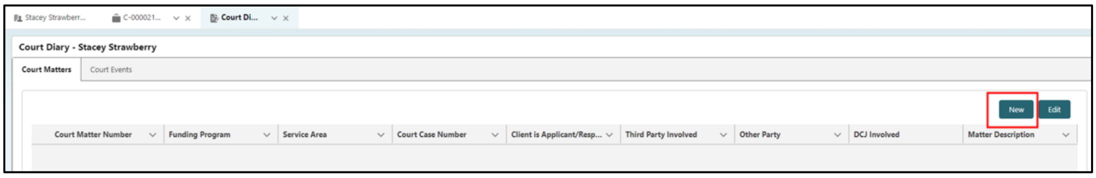
Sydney FASS is assisting their client via AVL from their office or FCFCOA Registry to attend a court mention/hearing at another FCFCOA Registry outside of their service area- In this example the client is not being referred to another FASS for the Hearing because the client is not attending court in person but is attending via AVL. Sydney FASS can record this by:

- Complete a Court advocacy Service Event as the client is being supported to attend court. Add in the Service Event summary – client attending via AVL from Sydney FASS, matter listed at Newcastle Court for Hearing.
- Court Diary - use Matter Description to explain again
- Court Event - choose 'none' for court location, you can also choose - client attended court and supported. In the notes section state via AVL from Sydney FASS for Newcastle Court.

In this example the client was not referred to another FASS for court support and the client remains working with Sydney FASS.

- Sydney FASS has a client who has a court matter listed at Newcastle FCFCOA Registry, you can internally refer the client to be supported by the FASS who services this court location. This avoids the client from having to retell their story again and this FASS can make contact to connect and offer support while the client is attending their court location. In this example Newcastle FASS would support the client at court for the mention/hearing and would record their own contact with the client in DFV Connect including the Court Advocacy Service Event and Court Diary. Newcastle FASS can communicate with the client and Sydney FASS re the court outcome. This client would effectively have the support of both FASSs, Sydney FASS for case coordination and Newcastle FASS for Court.

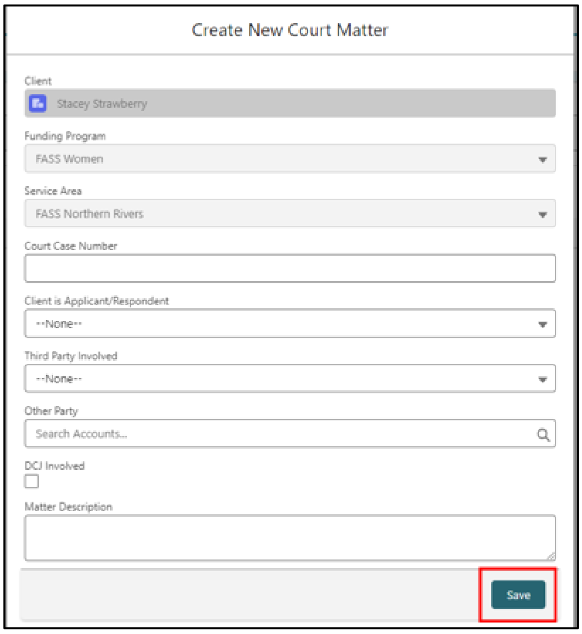
Process steps

Step	Description
1.	From the Person Account, or Case, click on **Court Diary** in the quick action bar (top menu). 
2.	The *Court Diary* screen will display. To add a Court Matter click on the **New** button. 
3.	The *Create New Court Matter* screen will be displayed. **Funding Program** and the **Service Area** will be pre-populated.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>

Complete the other required fields **Court Case Number**, Client is Applicant/Respondent, Third Party Involved, Other Party information and DCJ involved.

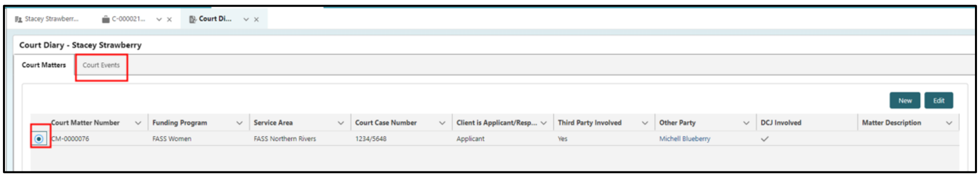
You can also include notes in the as to whether it is an Interim or Final Hearing in the Matter Description field. Click **Save.**



</td></tr>
<tr><td>4.</td><td>

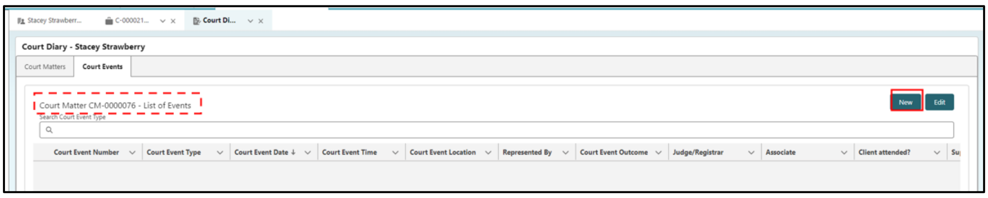
The Court Matter will be created and displayed.

To record information about the upcoming matter, or to record the outcome of a court matter after the court sitting has occurred, select the radio button next to that court matter, then click **Court Events** tab.



</td></tr>
<tr><td>5.</td><td>

The *Court Event tab* will open for the selected court matter. Click **New.**



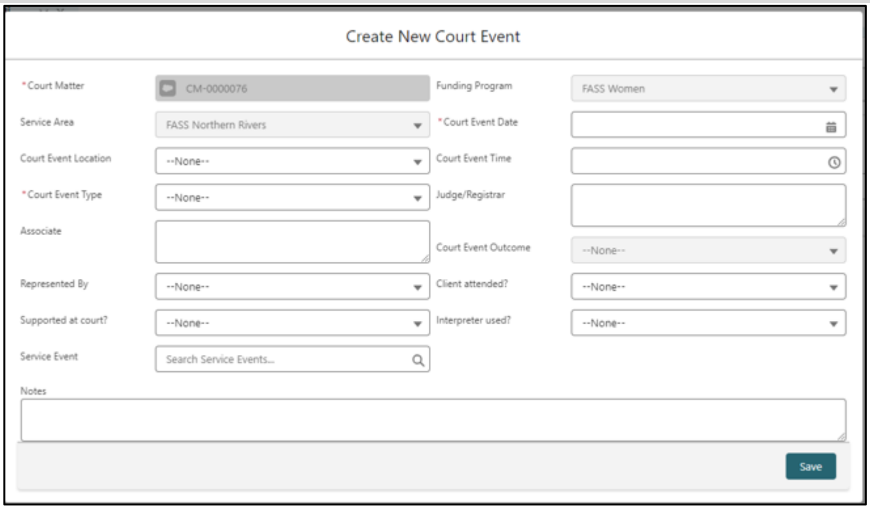
</td></tr>
<tr><td>6.</td><td>

The *Create New Court Event* screen will display.

Enter the Court Event Date, Time, Location.

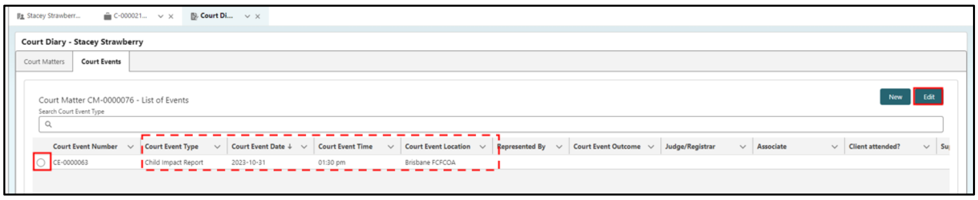
Click **Save.**

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>7.</td><td>Note that the court event is now saved, and the lefthand side of the screen displays the relevant court event information details.

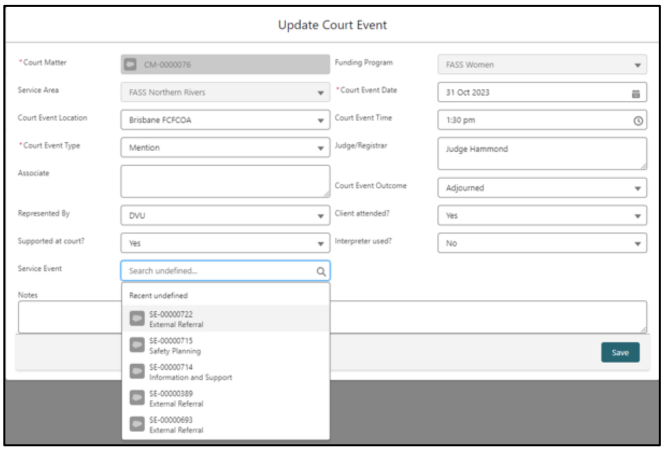
After a matter has been heard, you can record the relevant court event outcomes.

To record the court outcome, select the radio button of the court event and click on edit.


</td></tr>
<tr><td>8.</td><td>You can enter information about the court event outcome including

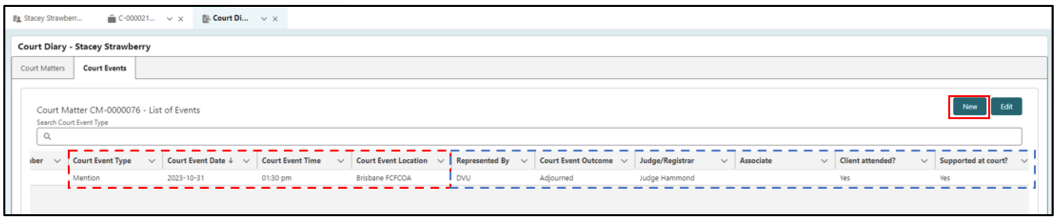
It is important that you select whether the client attended, was supported or an interpreter used
In the notes section you can record information about the matter.
There is also an option to add the information and support service event to the court event so you can easily access information about what happened specifically on that court event date.

When complete, click save.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>


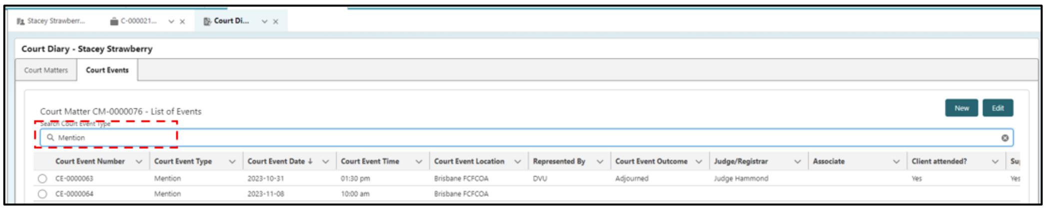
</td></tr>
<tr><td>9.</td><td>
When viewing the court diary, all court event information regarding date location and type are located on the lefthand side of the diary. The court event outcomes are all to the righthand side of the diary.

Note: Where the matter has been adjourned, you should always add a ‘new court event’ to so you have a complete record of upcoming court event.



</td></tr>
<tr><td>10.</td><td>
You can add as many court dates as required and enter in the outcomes related to that court event after the matter is heard.

- Each Court outcome can be recorded as a separate Court Event.
- To edit the Court Event, click on the radio button of the Court Event, then click **edit**.
- You can also search for a relevant court event, using the search bar.



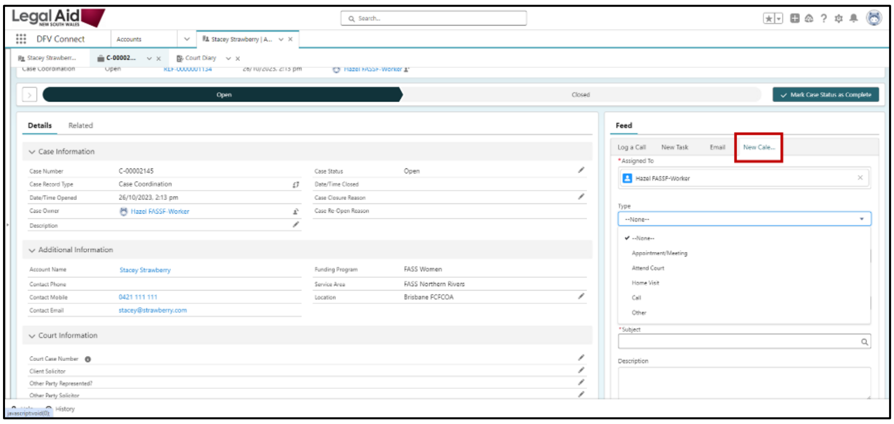
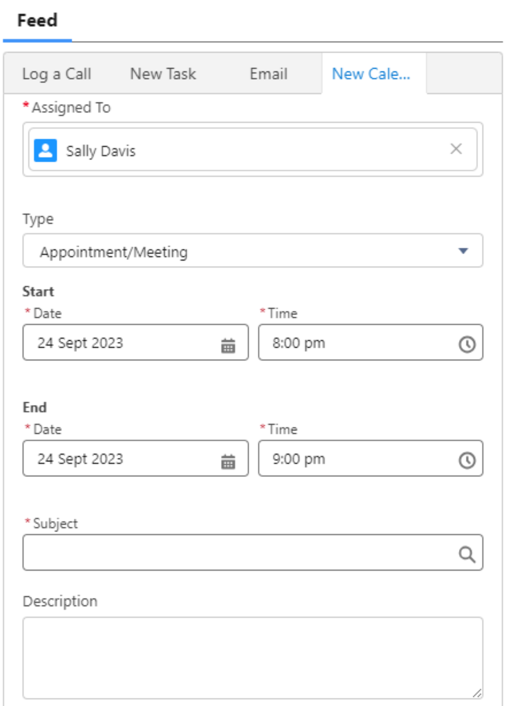
</td></tr>
</table>

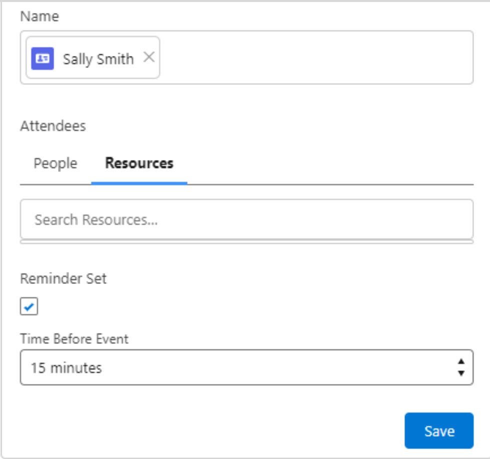
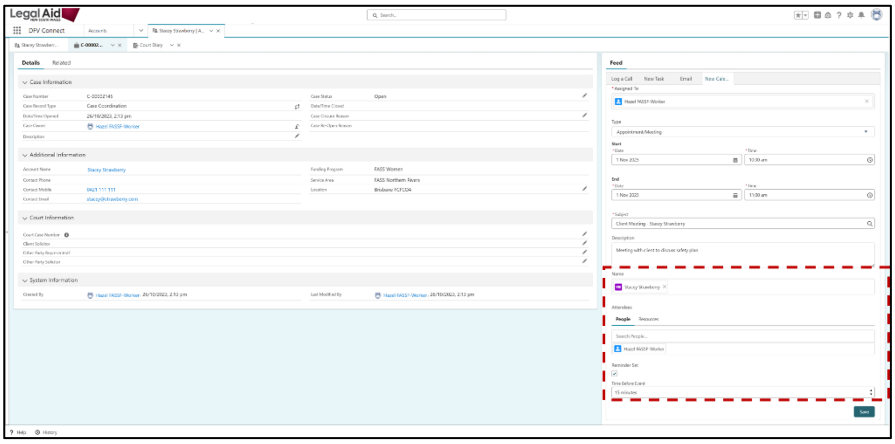
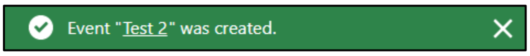
Calendar events

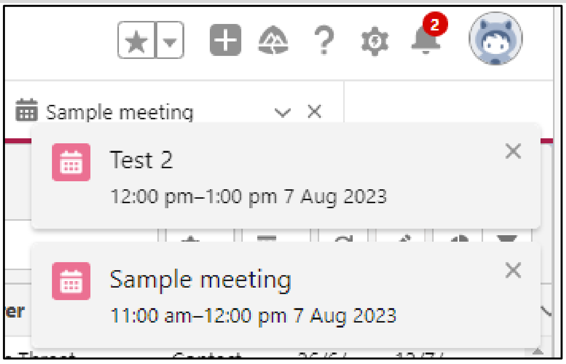
In DFV Connect, calendar events can be used to record client's appointments and meetings.

Create calendar events

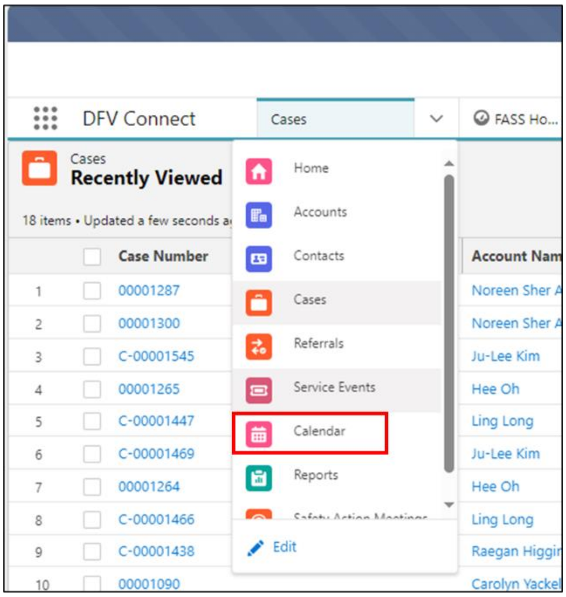
To record upcoming appointments with your client, you can use the 'Calendar Events' function in DFV Connect. This function enables you to save your appointments with your client and link your client's case coordination case to the calendar event so you can easily access your client's case.

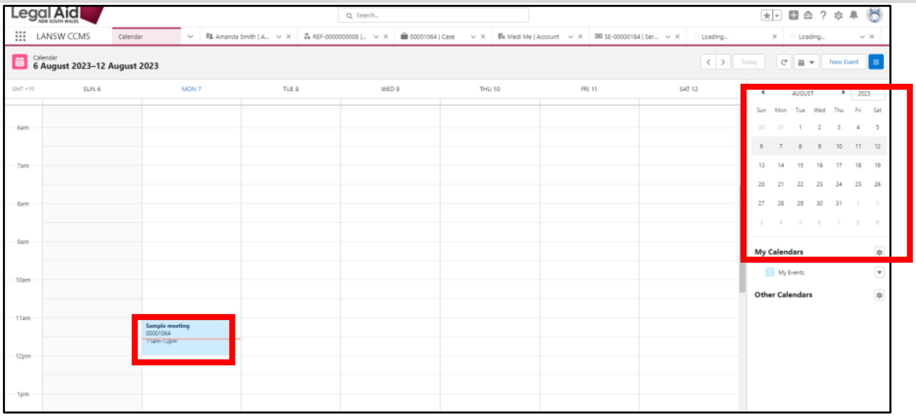
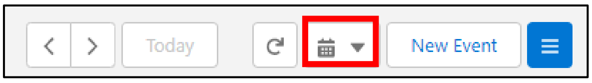
Step	Description	
1.	From the **Case**, in the **Feed** section, click on **New Calendar Event** 	
2.	The **Assigned To** field will have you selected by default. You can change this to another social support worker if needed. Select **Type** e.g. Appointment/Meeting, Attend Court, Home Visit, Other. Select the **Start Date** and **Time** Select the **End Date** and **Time** Select a **Subject** Enter a **Description** The **Name** of the Client should be pre-populated. Under Attendees you can add more **People** – the event will appear on their DFV Connect event calendar (not in their personal calendar like Outlook)	

Step	Description	
	Record any **Resources** if required. If you wish to set a reminder, tick the **Reminder Set** checkbox and select the **Time Before Event** that you would like to be reminded (default is 15 mins prior) Click **Save**	
3.	The calendar event will automatically record your name and contact details for your client. And you can set a reminder for the calendar event. Select **Save**. 	
4.	The *Event "Meeting Name" was created* pop-up will display to confirm that it has been saved  	
 	Events (appointments) will be saved in your DFV Connect Calendar, they **do not** synch with your personal calendar e.g. it will not appear in Outlook. Refer to View event calendar below to see your upcoming appointments. If you set a reminder it will look like this:	

Step	Description
	 Click on the x to close it.

View calendar

Step	Description
1.	From the Main Menu, select the **Calendar** icon. 
2.	Your *Calendar* screen will display, defaulting to the current Week. All events that are assigned to you, or that you have been added to (under Attendees, People) will be displayed. Click on an Event to see its details. Use the Monthly calendar on the right hand-side to select a specific date or week.

Step	Description
	
	Click on the icon to switch to a Day, Week, Month or Table (list) View. There is an option to **search for events** in the Table view. 

General Functions

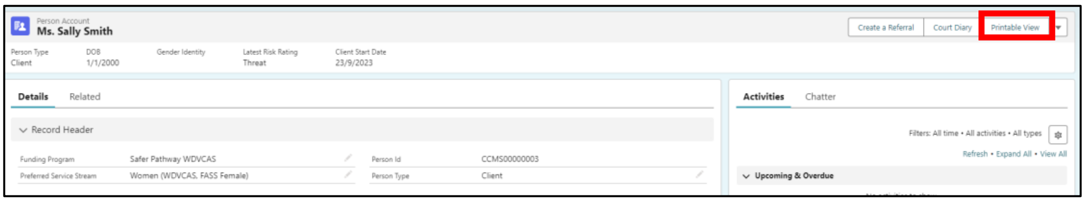
Print for offline working

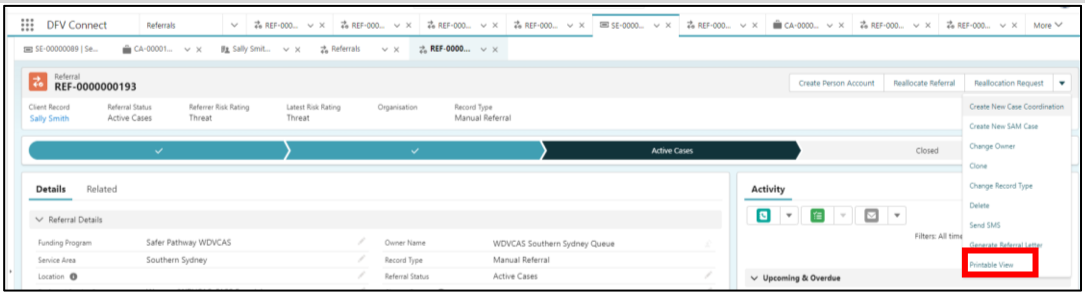
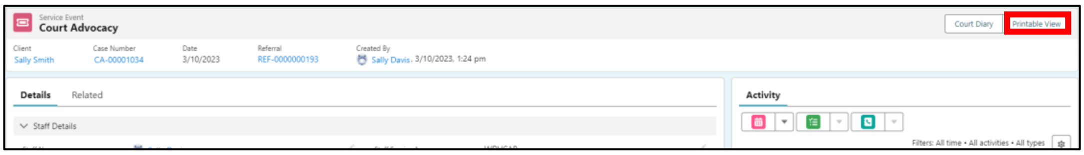
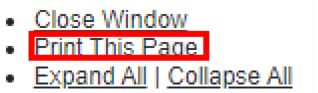
You can print a document that includes all relevant information that you might need to take to court, in particular where you will not have access to a laptop or WiFi at the courthouse. From the system, you can separately print the Person Account record, Referral record, and any Service Event.

Please note that any screen can also be printed using your internet browser e.g. Google Chrome, however this custom button **'Printable View'** will ensure that the Person Account, Referral and Service Event are neatly formatted. Please be reminded that all printed documents are classified as 'Sensitive – Personal' as they contain sensitive and personal information, and you should be careful to not share these, as well as dispose of them properly when they are no longer needed or relevant.

Notes

Note	Description
Subpoenas	• FASS records may be the subject of subpoenas. A FASS Manager should obtain legal advice before responding to a subpoena (refer to the FASS Policy & Procedure Manual) • If advised to provide documentation after legal advice FASSs can print and then redact necessary information.

Step	Description
1.	Print Person Account  *Note:* this screenshot shows printing the client record. You can also print the Other Party or Child Dependent Account in the same way if required. *Print Referral*

Step	Description
	 *Print Service Event* 
2.	When the relevant screen opens, click Print This Page in the top right-hand corner 

Upload a file

Uploading files

As DFV Connect has been purpose built for WDVCAS and FASS services with specific fields and functions to record information. There should be less need to upload files to the system and where possible, information should be recorded within the system so its properly recorded and reported on.

There should no longer be the need to scan or upload documents such as:

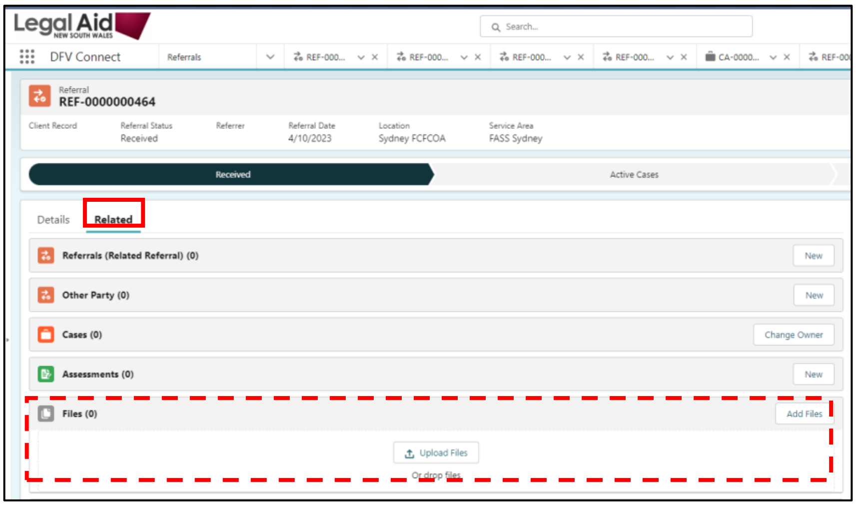
- Intake assessment
- File notes and
- DVSAT results etc.

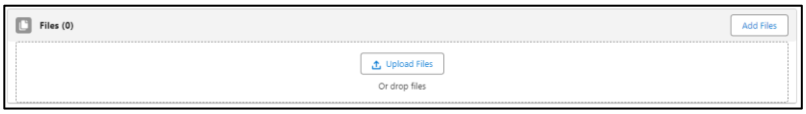
Almost all records in DFV Connect can be printed if a hardcopy is required (e.g., at court). It is encouraged you only upload files where necessary.

File visibility

While DFV Connect can store files within an account, referral, and case records, it is recommended that you upload files to the client's **case** only as this information is visible to your service area. Please be mindful of uploading files to a client account and/or referral and only upload these where necessary as this information will be visible to all service areas.

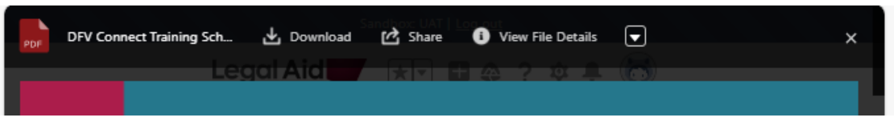
System steps

Step	Description
1.	From **Referral** or **Case**, click on the **Related** Tab. Scroll down to the **Files** section of the related tab. 
2.	Click on **Add Files**, locate the document you wish to upload, then click **Open**. Alternatively, you can **drag and drop** a File into the Files section of the page.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>You are permitted to upload PDF, Word, Email, JPEG, PNG, or Excel files. The file size limit is 25MB.

</td></tr>
<tr><td>
</td><td>All files will be scanned for viruses. If your file is deemed unsafe e.g. if it contacts a virus, you will see that the file name becomes HARMFUL CONTENT REMOVED. In this instance, the file will not be uploaded, and cannot be opened by any user. The Support Team will also be notified. If you need to upload the file and are unsure how to ‘clean’ it using an Antivirus tool available within your business, contact the ICT Service Desk.


Please note there is limited file storage within DFV Connect and costs will be incurred if the limit is reached.

There should no longer be the need to upload documents such as client contact sheets, intake forms, etc. You may upload emails or letter templates that are edited or received from external providers, Child Protection Reports, and Duty Solicitor Forms.</td></tr>
<tr><td>3.</td><td>Click on the File name to preview it.

From this screen you can Download, Edit File Details or Delete. You can only delete files that you uploaded.



 You can Share an uploaded file only with a user who using DFV Connect. When you Share a document the person you are sharing it with will receive an email with a link to the shared document.</td></tr>
</table>

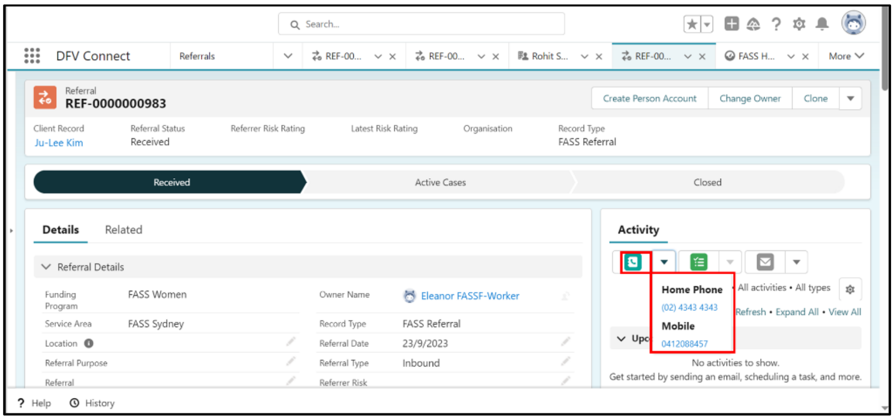
Log a call

Log a call activity can be uploaded to the person account, referral, or case.

Use this transaction when you need to keep a record of contact, eg., when you contact the client or referring person, or if you do a follow-up contact.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>
From the

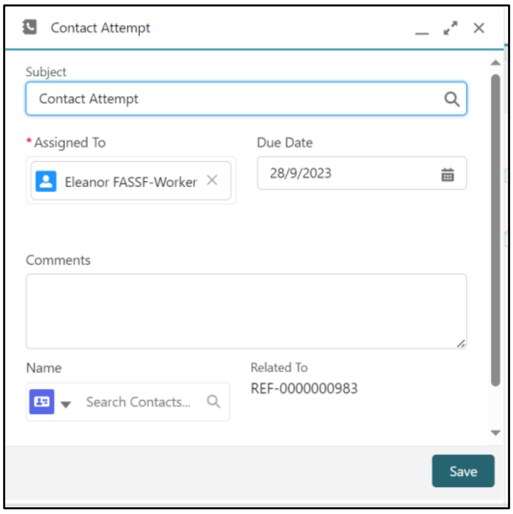
- **Referral** screen, go to the **Activity** area on the right-hand side and select the **Phone** icon. Note that client phone number is available from the drop-down menu. OR
- **Case** screen, go to **Feed** area on the right-hand side and select **Log a Call**



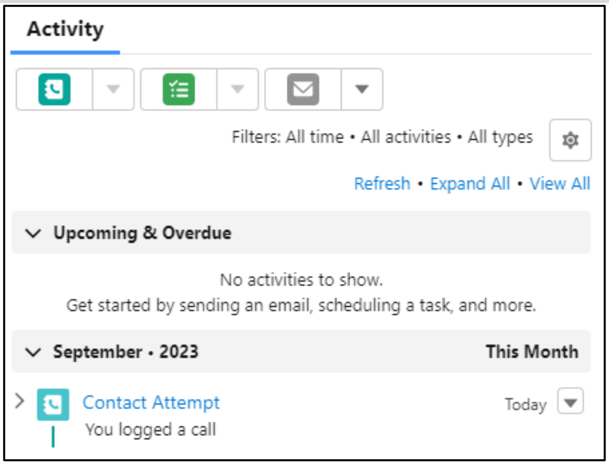
</td></tr>
<tr><td>2.</td><td>
The **Contact Attempt** screen is displayed.

The Subject is defaulted to **Contact Attempt**.

Assigned To field is prepopulated with your details and the **Due Date** is set to today's date. You can add **Comment** and also, use the **Name** field to search for the details of the person you have contacted. Select **Save**.



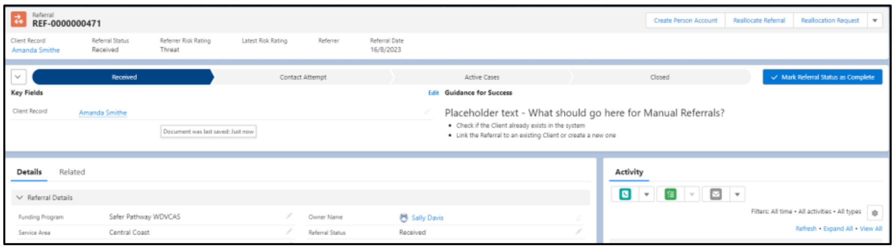
</td></tr>
<tr><td>3.</td><td>The Activity area of Referral record will display that the record that the call was logged.</td></tr>
</table>

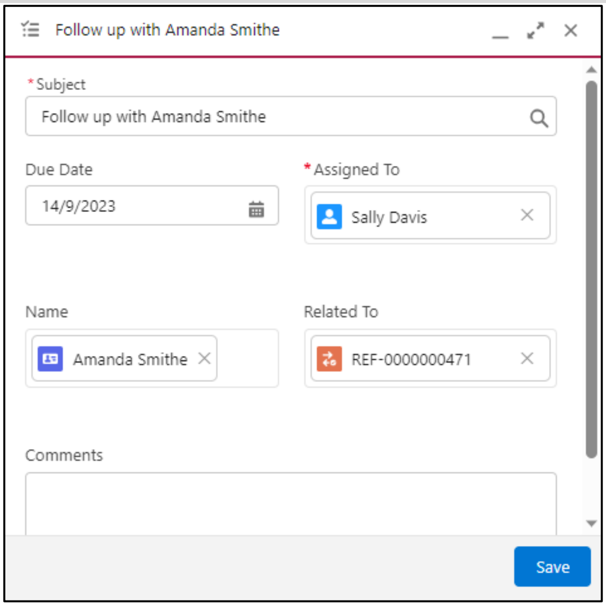
Step	Description
	

Create a task

Tasks allow you to track activities as a to-do list in the application. You can relate tasks to specific referral or case records, and you can create single or recurring tasks.

Tasks that you have created, and that are due today, will also appear on your homepage under Today's Tasks.

Step	Description
1.	From the: • **Referral** screen, go to the **Activity** area on the right-hand side and select the **Task** icon. OR • **Case** screen, go to **Feed** area on the right-hand side and select **New Task** 
2.	The **New Task** screen is displayed. Enter a **Subject** and a **Due Date.** The **Assigned To** field is prepopulated with your details. You can add the relevant client in the **Name** field to search for the details of the person you have contacted. Select **Save**.

Step	Description
	

Send an email

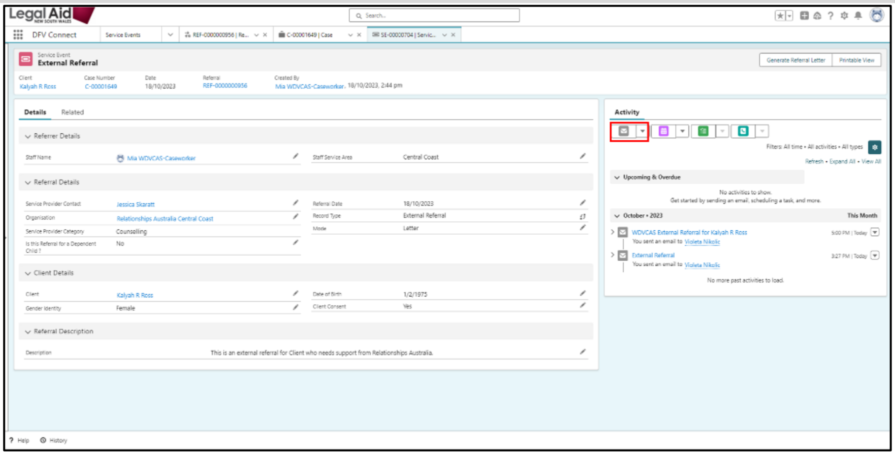
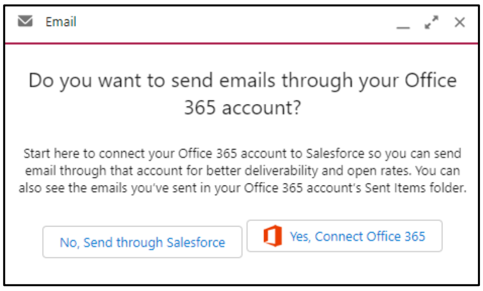
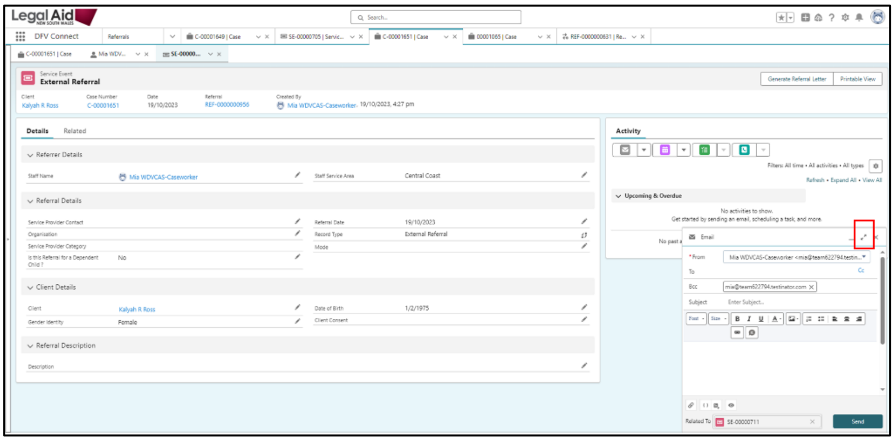
You can send emails from cases and service events created in DFV Connect to keep a record of services provided and ensure a record is kept within the system.

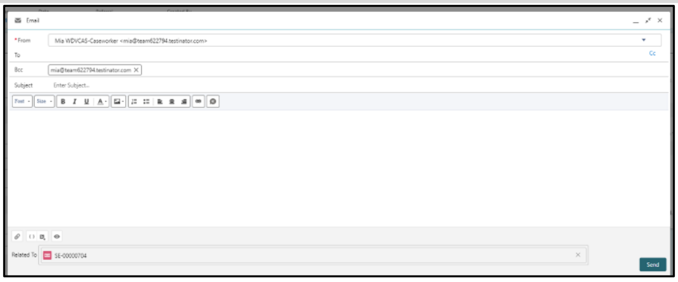
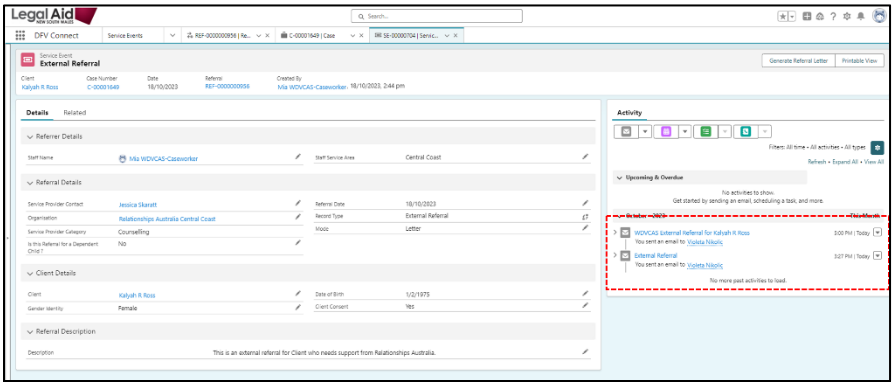
You can also send an email from your work email domain and attach the email to the file to your case or service event if this is more suitable (particularly in instances where you choose to have the entire email thread uploaded.

Please note: you should only send an email from a referral where it is related to making contact with the client.

Process steps

Step	Description
1.	From the case, service event or referral record in the **Activity** feed, click on the envelope icon.

Step	Description
	
2.	If you get a message about sending emails through your office 365 account, click **No, Send through Salesforce**. 
3.	The *Email* pop-up window will be displayed. You can click on the arrows to expand the email pop-up. 
4.	Enter the address, subject and body of email. If the client or service provider contact has been created in the system, their information will appear when you start typing their name. Click on the paperclip icon to attach files.

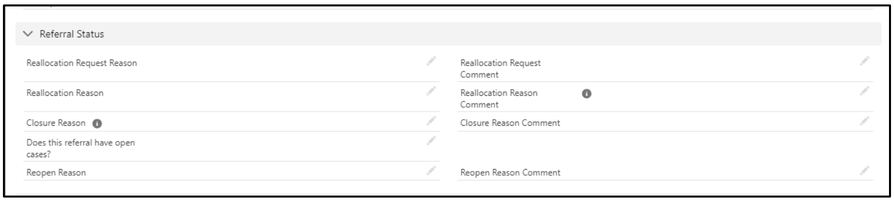
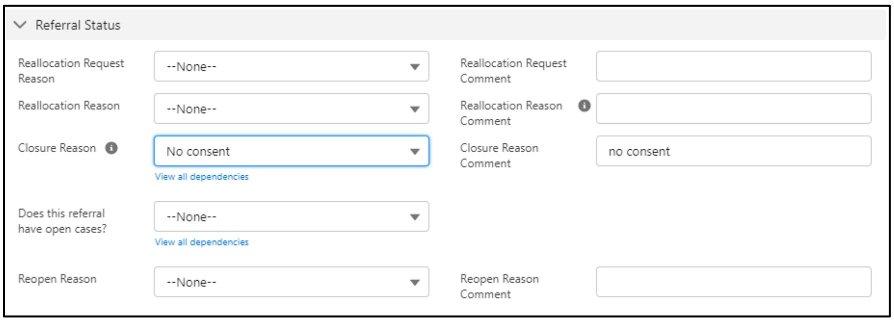
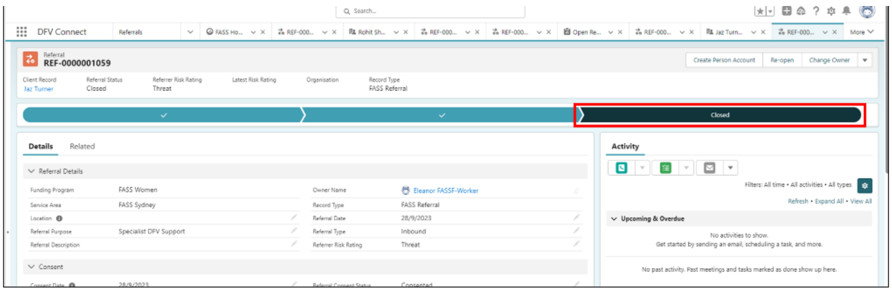
Step	Description
	
5.	The email sent will display in the activity feed of the record. 
6.	The recipient will receive an email from noreply@salesforce.com on behalf of your email address. **Please note:** if they click on reply, it will automatically default to your work email address. 

Referral and Case Closure

Referrals

Close a Referral

Pre-requisite to close a referral is to enter a Consent Status and close any related active Cases.

Step	Description
1.	Search for the Referral and click on the referral link (e.g. REF-000xxxx) to open it.
2.	The *Referral screen* will be displayed. Scroll down to the **Referral Status** section. Click a **pencil** (edit) icon. 
3.	Click on the Referral Status drop down list and select the **Closed** option. From the **Closure Reason** drop-down list select the closure reason – See [Referral closure reasons]() for further information to assist you in making the most appropriate selection Enter a **Closure Reason Comment**. Click **Save.** 
4.	The Referral status will now show that referral is Closed. 

Step	Description
	If you get an error message ‘Please close all related Cases before closing this Referral,’ go to the Referral Related Tab, click on the Case Number to navigate to the Case, then follow the instructions to Close the Case before returning to close the referral. If you get an error message, ‘You hit the snag’ scroll up and record the Consent Date and Consent Status before attempting to close the referral.

Referral Closure Reasons

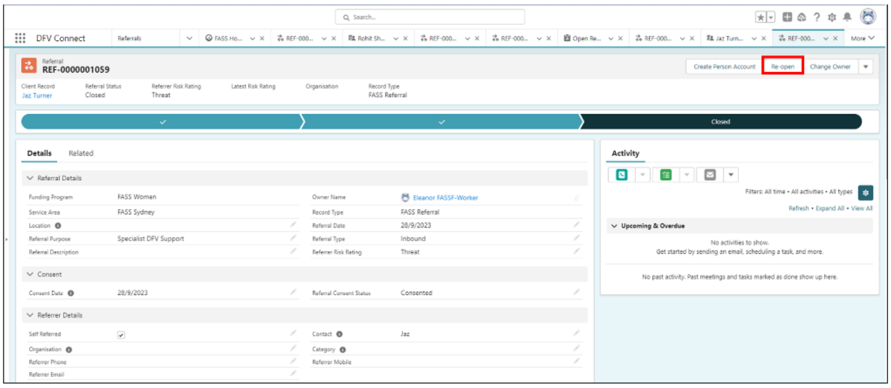
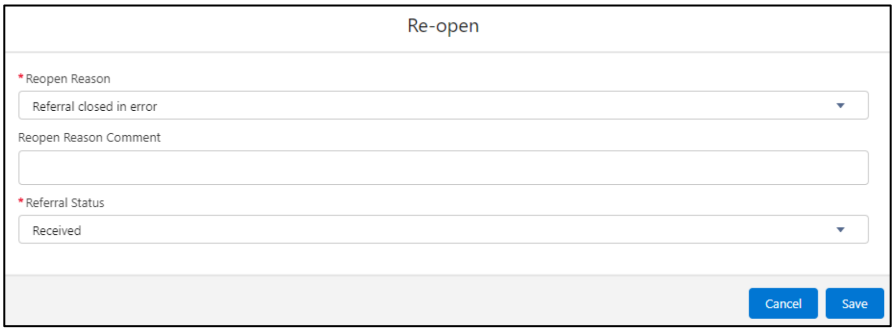
When choosing a referral closure reason ensure it relates to the last action for the referral.

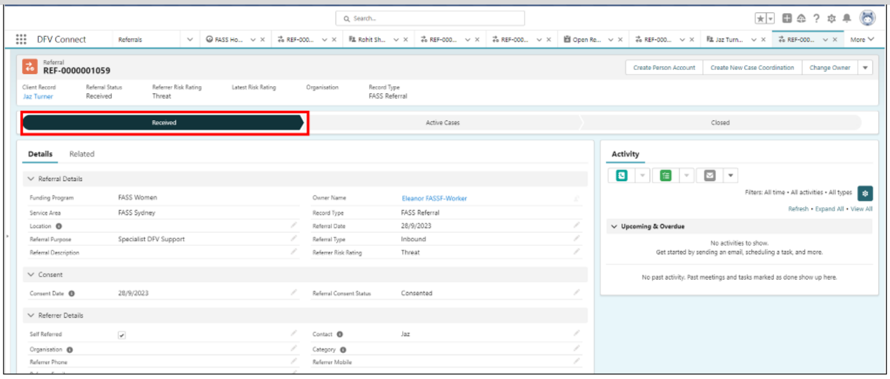
Referral Closure Reason	Description
Support provided	Contact was made with the client, consent was obtained, a case was created, and support was provided.
No consent	Contact was made with the client who did not provide consent for support services.
No services required	Contact was made with the client, and it was determined that no services were required.
Missing or incorrect contact details	Contact could not be made as the phone, mobile or email were not correct. It is important that you contact the referring organisation to confirm the clients' contact details before closing a referral for this reason.
Phone not answered	A number was provided on the referral however it rings out, goes to voicemail, or the phone was turned off.
Incorrect referral	Contact was made with the client, and it was determined that the referral has been made in error, e.g., the client has no Family Law matters
Related referral	Another referral has been received or created in the system for the same incident
Person deceased	Victim is deceased and services are not / no longer required. Be sure to also update the Person Account and update the Deceased Status on this record.

Re-open referral

If the client makes contact after the referral has been closed or the referral was closed in error, you can re-open it.

Process steps

Step	Description
1.	Search for the Referral and click on the referral link (e.g. REF-000xxxx) to open it.
2.	Select the **Re-open** button in the top-right hand corner. 
3.	The *Re-open* screen will be displayed. Select a **Re-open Reason** (see Re-open reasons for further information to assist you in making the most appropriate selection). Enter a **Reopen Reason Comment** if required. The **Referral Status** should be automatically reverted to 'Received' Click **Save** 
4.	The Referral status will now show that referral is in Received status.

Step	Description
	

Re-open Reasons

Referral re-open Reason	Description
Closed in error	Referral was closed by accident or with an incorrect closure reason
Client contact after closure	Referral was closed after unsuccessful contact attempts, or contact was made but client declined support. However, client then contacts service after referral closed to ask for support.
Other/exceptional circumstances	For example, reopening referrals for the purpose of correcting information.

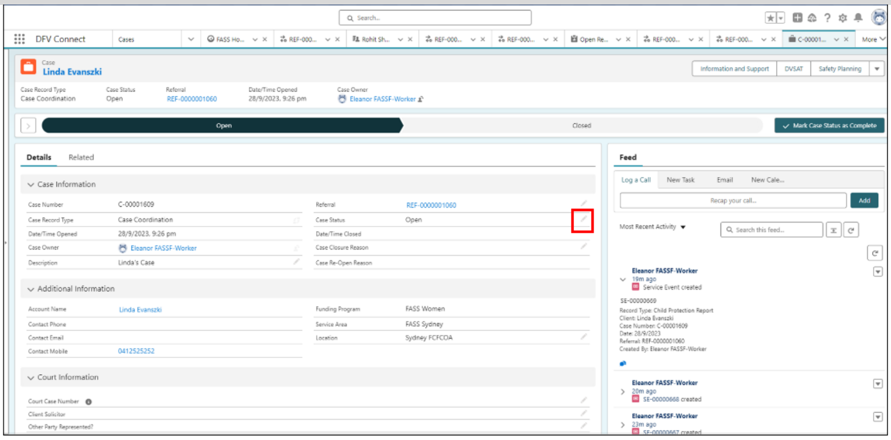
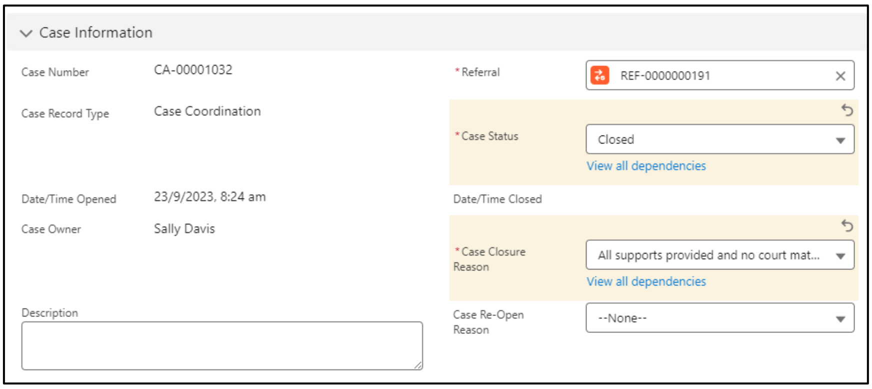
Case Coordination Case

Close a case coordination case

When a matter is finalised with your client, you should close your case coordination case to maintain a complete client history.

Please be reminded that you should also close the associated referral after closing a case coordination case.

Step	Description
1.	From the Case record, click on a pencil icon to go into edit mode.

Step	Description
	
2.	Change the **Case Status** to Closed and select a **Case Closure Reason**. Case closure reasons for further information to assist you in making the most appropriate selection. Click **Save** 
NOTE	If closing a case because the client is deceased, please remember to also record this on other open cases, the referral(s), and the person record.

Case coordination closure reasons

Case Closure Reason	Description
All supports provided and no court matter	Client does not require any further support and they do not have any court scheduled matters.
All supports provided and court matter finalised	Client does not require any further support and their court matters are finalised.
Client disengaged	Client is no longer receiving support and does not engage with FASS social support workers.
Client deceased	Client deceased – Note – please ensure you record on their open cases, the referral(s), and the person record.