DFV CONNECT
USER GUIDE

Women's Domestic Violence
Court Advocacy Services

Contents

General

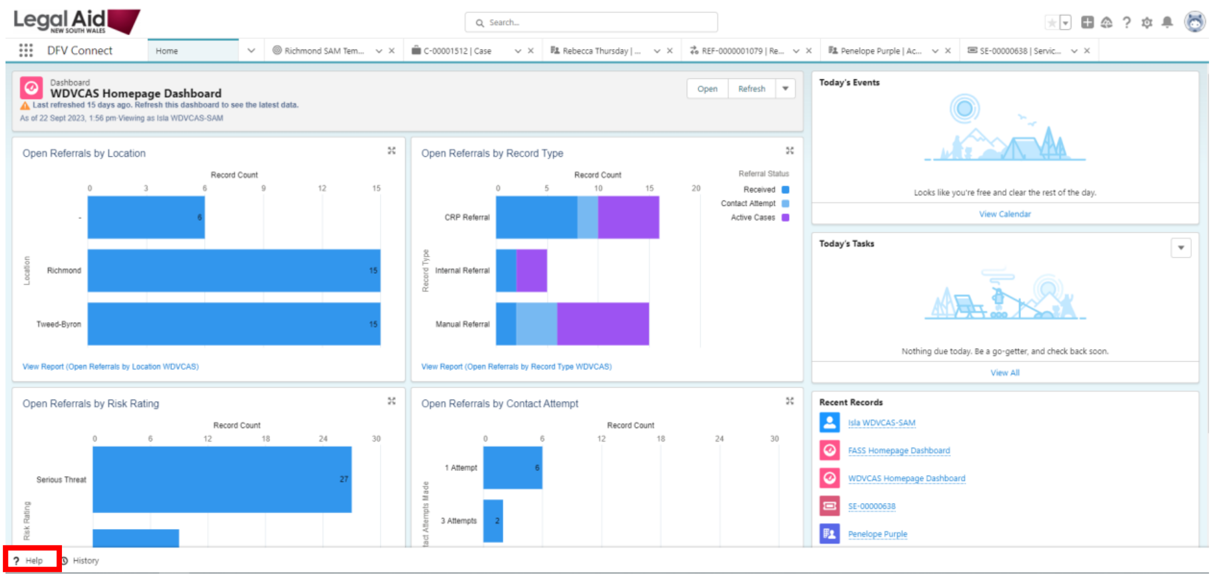
Getting Help

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, please contact the Legal Aid NSW WDVCAP Unit.

Type of issue	Legal Aid NSW Team	Contact

Technical issues and policy or practice related questions	**WDVCAP Unit** Mon – Fri 08:00 – 17:00	wdvcap@legalaid.nsw.gov.au

Abbreviations

ADVO	Apprehended Domestic Violence Order
COI	Conflict of Interest
CRP	Central Referral Point
DCJ	Department of Communities & Justice
DFV	Domestic & Family Violence
DVO	Domestic Violence Officer
DVLO	Domestic Violence Liaison Officer
DVSAT	Domestic Violence Safety Assessment Tool
FASS	Family Advocacy and Support Service
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 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 provided for clients. For WDVCAS staff, there are three different types of cases – case coordination case, case management case and SAM case.
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 WDVCAS user, the funding program will always display as WDVCAS.
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 AVO.
List Views	List views contain high level information about components in DFV Connect. Users can access certain list views depending on the component (eg., Account, Referral or Case) selected.
Service Area	Service area refers to the catchment area within each funding program.
Service Location	Within a WDVCAS Service Area, there will be one or more Service Locations. For WDVCASs, this is the Safety Action Meeting (SAM) catchment area. For example, South West Sydney WDVCAS will have one Service Area and three Service Locations (Bankstown SAM, Liverpool SAM and Fairfield SAM).
Other Party	Person of Interest/Other Party in referral received.
Referrals	Users in DFV Connect can receive and create referrals. Types of referrals received: • CRP referral • Manual • Internal Types of referrals made for a client: • External • Internal
Related Referral	Referral that relates to the **same incident** as another referral received.
Service Provider	External service provider
CRP Referral	Referral received from the CRP (Central Referral Point).

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

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

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

The DFV Connect User Guide – WDVCASs should be read in conjunction with the WDVCAP Policy and Procedure Manual.

Document purpose

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

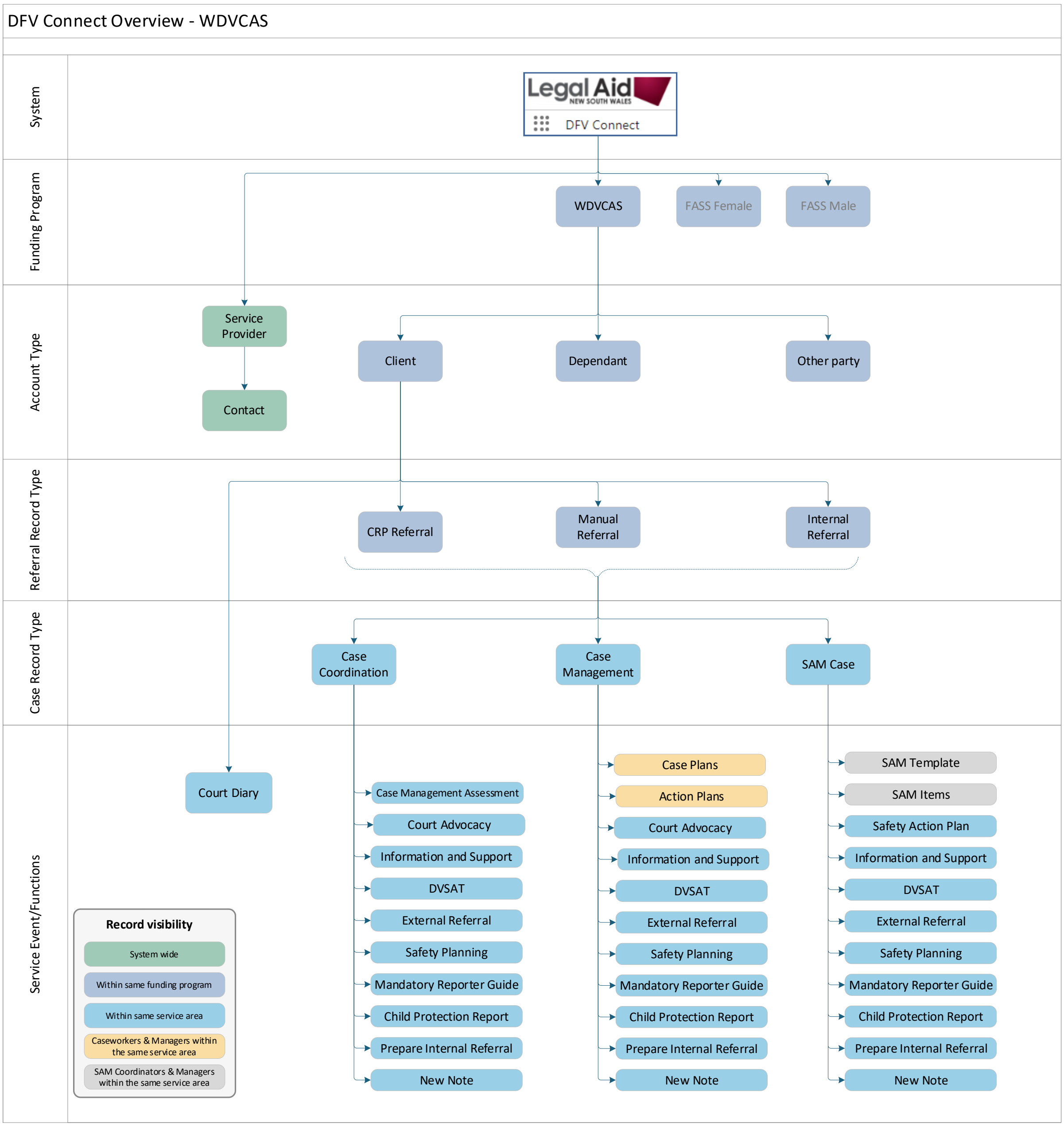
This document aims to assist WDVCAS staff to be able to use the system efficiently and ensure consistent storage information and data.

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 WDVCAS staff using DFV Connect.

System overview



Visibility

	Service Provider/ Contact	**Client, Dependant, Other Party**	**Referral** (CRP, Manual, Internal)	**Case Coordination**	**Case Management**		**SAM Case**	
				See below for list of Case Coordination Service Events / Functions (*)	See below for Case Management Service Events/ Functions (**)	Case Plans, Action Plans	See below for list of SAM Case Management Service Events / Functions (***)	SAM Record, SAM Items
All DFV Users	x							
Within Funding Program	x	x	x					
Workers (within service area)	x	x	x	x	x		x	
Caseworkers (within service area)	x	x	x	x	x	x	x	
SAM Coordinator (within service area)	x	x	x	x	x		x	x
Managers (within service area)	x	x	x	x	x	x	x	x

(*) Case Coordination Service Events / Functions - Information and Support, DVSAT, External Referral, Safety Planning, Mandatory Reporter Guide, Child Protection Report, Court Advocacy. Prepare Internal Referral, Case Management Assessment, New Note, Court Diary.

(**) **Case management Service Events / Functions** - Information and Support, DVSAT, External Referral, Safety Planning, Mandatory Reporter Guide, Child Protection Report, Court Advocacy, Prepare Internal Referral, New Note, Court Diary, Case Plans.

(***) **SAM Coordination Service Events / Functions** - Safety Action Plan, Information and Support, DVSAT, External Referral, Safety Planning, Mandatory Reporter Guide, Child Protection Report, Court Advocacy. Prepare Internal Referral, New Note, Court Diary.

Privacy and user access

Access to DFV Connect is restricted through User identification and authentication controls. Each User will be uniquely identifiable to ensure accountability for use.

Only the Legal Aid NSW Administrators (WDVCAP Unit staff) can authorise Users to access DFV Connect. Only Users who are employed directly by the following agencies or organisations will be granted access to DFV Connect:

- Legal Aid NSW
- NSW Department of Communities and Justice (DCJ)
- A Women's Domestic Violence Court Advocacy Service (WDVCAS)
- A FASS Social Support Service.

Access privileges to information in DFV Connect will be limited to the minimum level required to fulfill the functions of the User's position. Individuals requesting access to DFV must:

- Be aware of their obligations regarding information sharing and privacy
- Undertake training on the operation of DFV Connect
- Sign this Agreement.

In line with privacy legislation, Users should only access or use any information in DFV Connect:

- To provide WDVCAS or FASS services, 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
- Where another exemption under the privacy legislation applies.

Users must not use or access any information in DFV Connect:

- For any reason not listed above, unless they have client consent to do so
- To gossip, out of curiosity (e.g., if a case is in the media), or for personal benefit
- As a favour for another person
- To search DFV Connect for familiar names or to access information about family, friends, co-workers or acquaintances
- In a way that is not consistent with the impartial exercise of your regular functions as a WDVCAS or FASS employee.

Users with access to DFV Connect must observe the following measures:

- Each User will be assigned an individual username
- Each User will be asked to set a password that complies with the password requirements noted below
- The level of access for each User will be determined by the Legal Aid NSW Administrator and will be based on the User’s funding program and role.

Legal Aid NSW will undertake an audit of access to DFV Connect on a quarterly basis.

User account set-up and login

Access and delete request

WDVCAS Managers can access and download the Access and Delete request form (see Appendix) 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, SAM Coordinator, DFV Specialist Worker, Caseworker, 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.

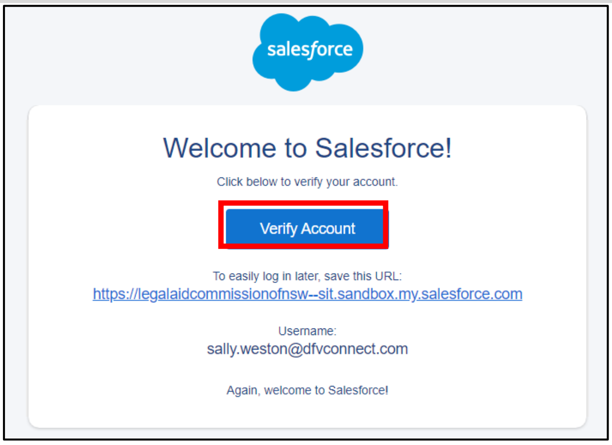
User account set-up

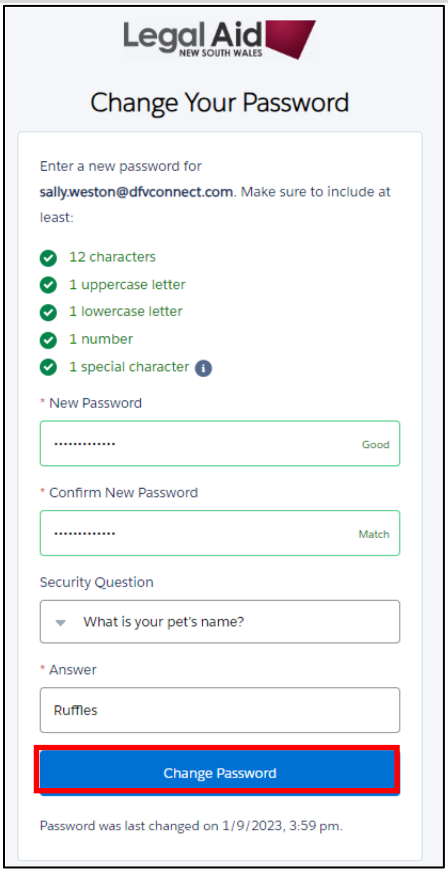
Notes

- 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:

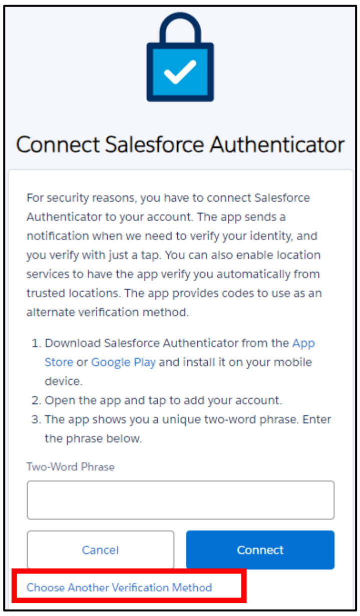
- Your password
- Confirmation of your identity

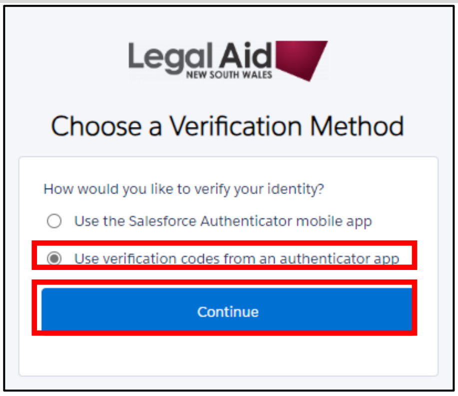
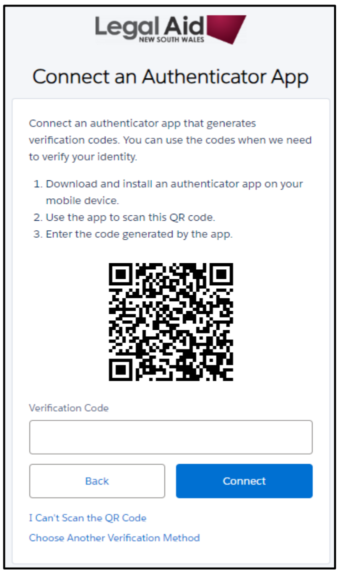
You will need to have the Microsoft Authenticator application installed on your phone to set up multi-factor authentication.

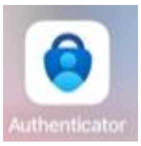
You can download the app from the App Store (for iOS) or Google Play Store (for Android) by searching for 'Microsoft Authenticator' and following the installation instructions.

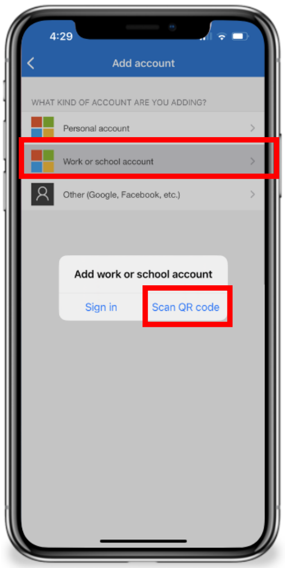
Process steps

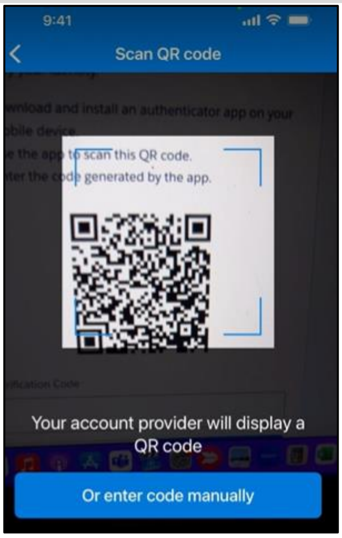
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>Open Google Chrome, the optimum browser to use for this system and enter the URL https://legalaidcommissionofnsw.my.salesforce.com/

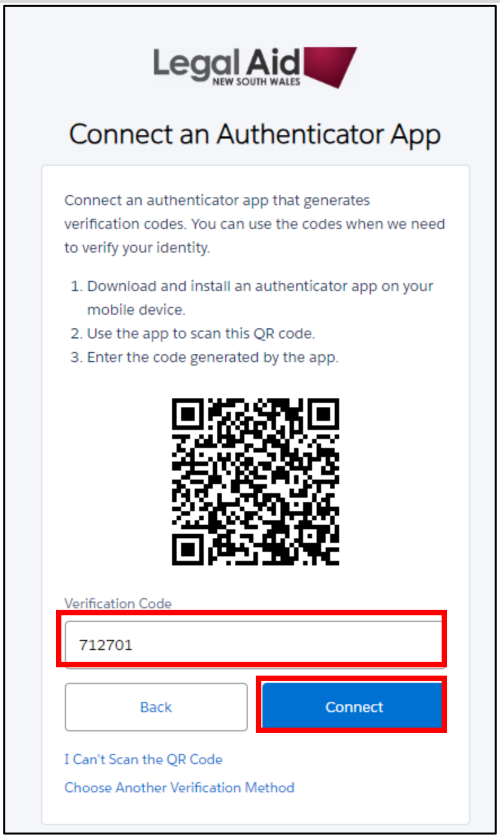
or click on your saved shortcut to open the application – see the Tip above.</td></tr>
<tr><td>2.</td><td>The Connect Salesforce Authenticator screen will display. Click Choose Another Verification Method.

</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>

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>5.</td><td>The Connect an Authenticator App screen will display.

</td></tr>
<tr><td>6.</td><td>If you haven’t already, go to the App store on your mobile phone, and download Microsoft Authenticator .


</td></tr>
<tr><td>7.</td><td>On your mobile phone, open the Authenticator App and click + to Add an account.</td></tr>
</table>

Step	Description
	
8.	The Add account screen will display. Select **Work or school account.** Select **Scan QR Code.** 
9.	Your mobile phone camera will open. Hold the phone towards your DFV Connect screen, aligning the frame with the QR Code.

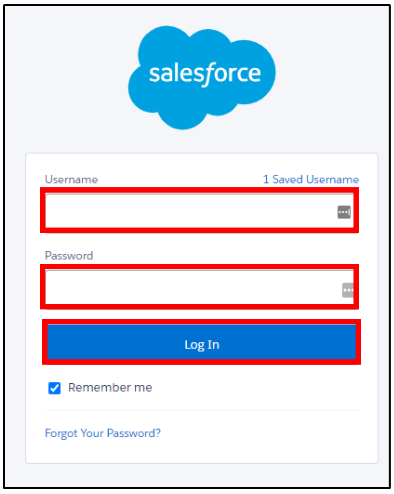
Step	Description
	
10.	If a pop-up displays, click Continue. A verification code will display. 
11.	Enter the code generated by the app into the Verification Code field box on your computer. Click **Connect.**

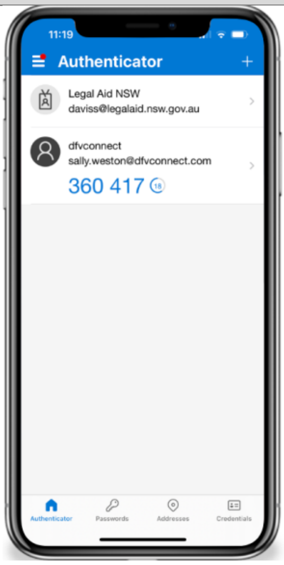
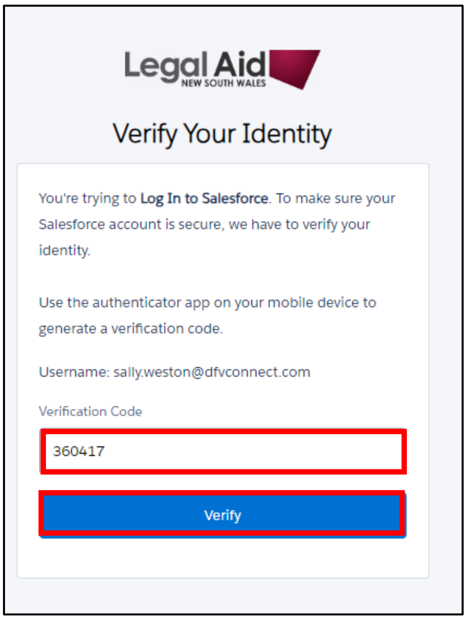
Step	Description
	
12.	The system will open and the *Home* screen or your last visited page will display.

Log in

Google Chrome is the optimum browser for using the system.

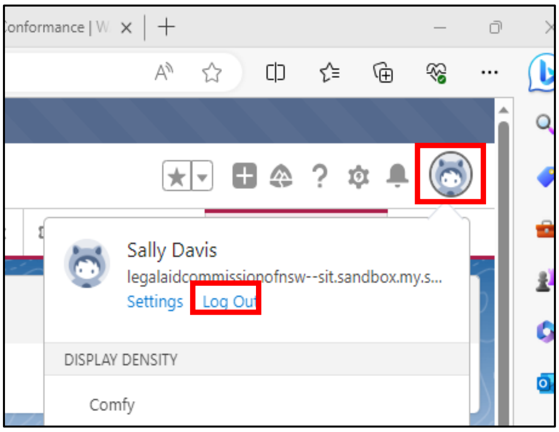
Process steps

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.

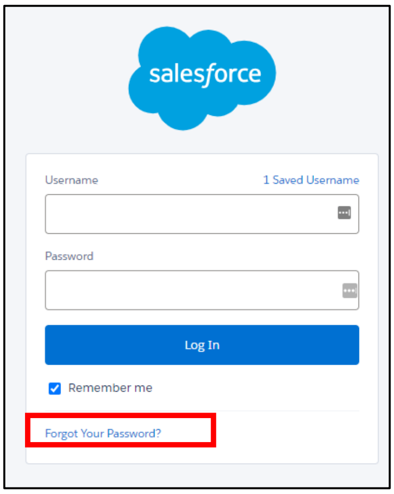
Log out

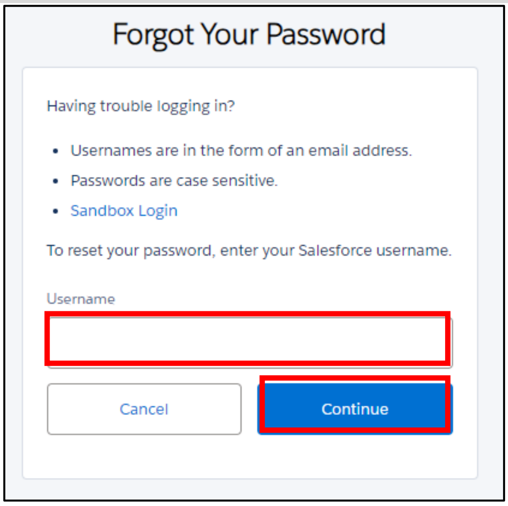
Process steps

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

Forgot password

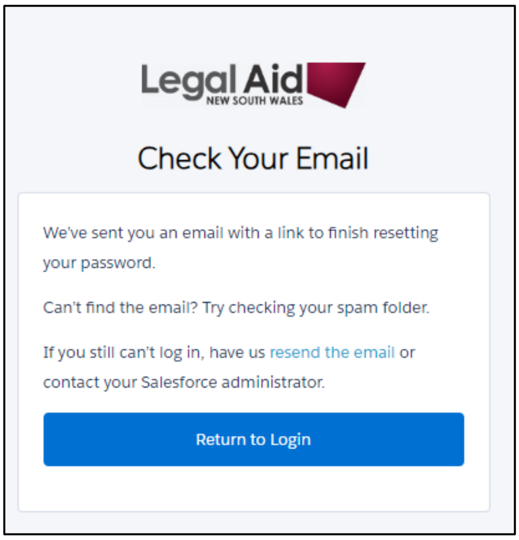
Process steps

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>


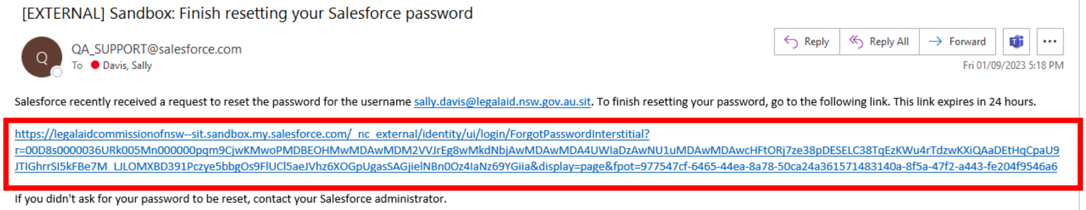
</td></tr>
<tr><td></td><td>
Your username is separate to your Email Address, so on clicking Continue, and email will be sent to your email on record.

Note: Password cannot be reset by you more than once in a 24-hour period. If you need to reset it within this period, please contact wdvcap@legalaid.nsw.gov.au
</td></tr>
<tr><td>3.</td><td>
The *Check your Email* screen will display.

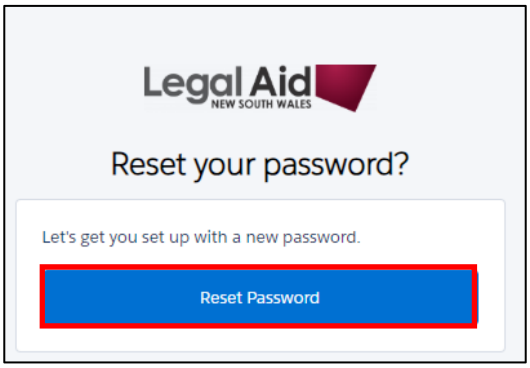


</td></tr>
<tr><td>4.</td><td>
Check your inbox and find an email from support@emea.salesforce.com.

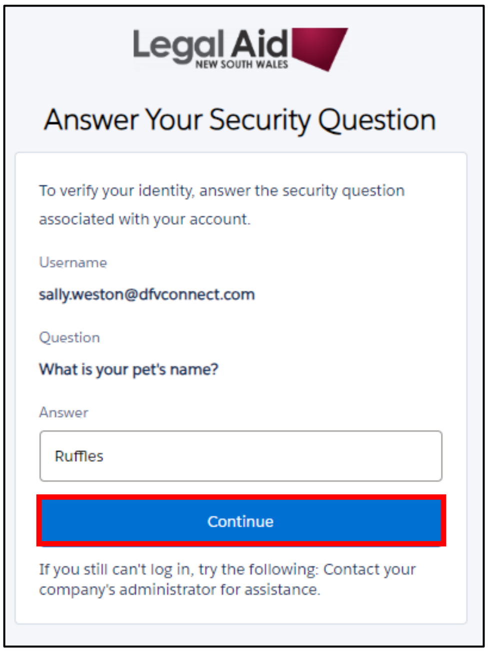
Click on the link in the email.
</td></tr>
</table>

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


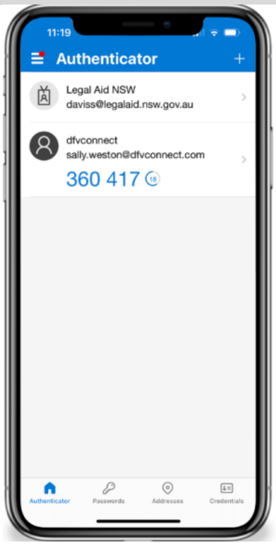
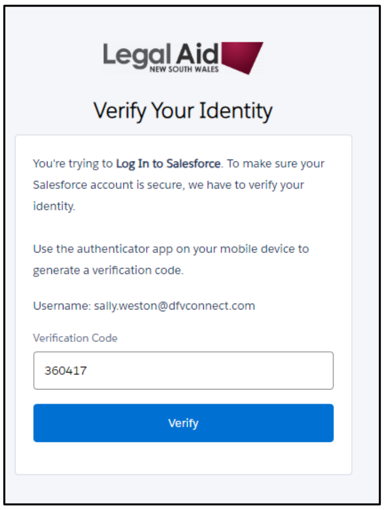
</td></tr>
<tr><td>5.</td><td>
The Reset your password? Screen will display. Click Reset Password

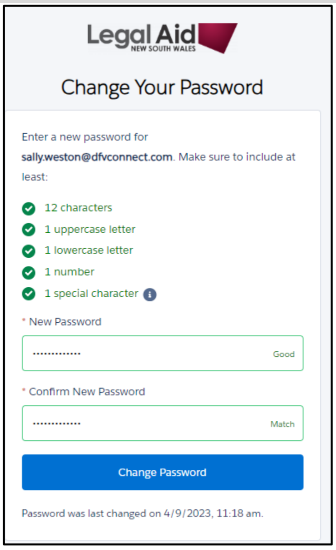


</td></tr>
<tr><td>6.</td><td>
The Answer Your Security Question will display. Enter your Answer. Click Continue



</td></tr>
<tr><td>7.</td><td>
The Verify your Identity screen will display
On your mobile phone, open the Microsoft Authenticator App
A verification code will be displayed
</td></tr>
</table>

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.

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


</td></tr>
<tr><td>10.</td><td>The system will open and the Home screen will be displayed.</td></tr>
</table>

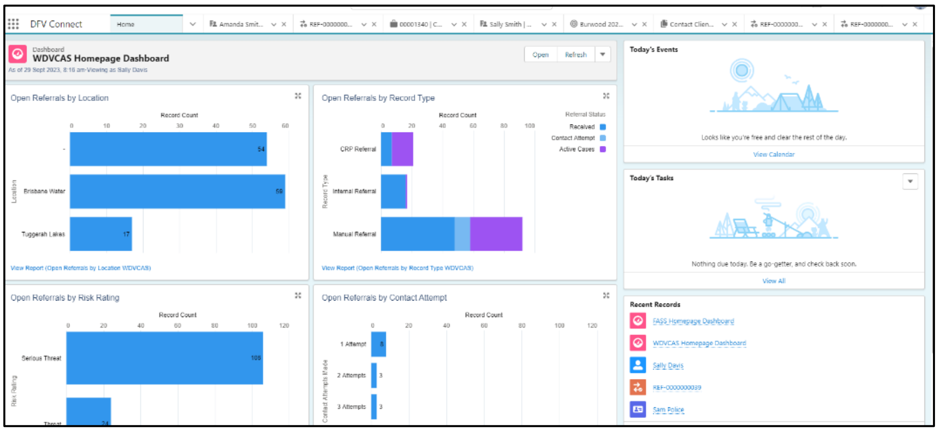
Navigation

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.



Note

- You will not automatically be taken to your homepage each time you log in, you can access the Home page at anytime via the main menu.

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
- Safety action meetings

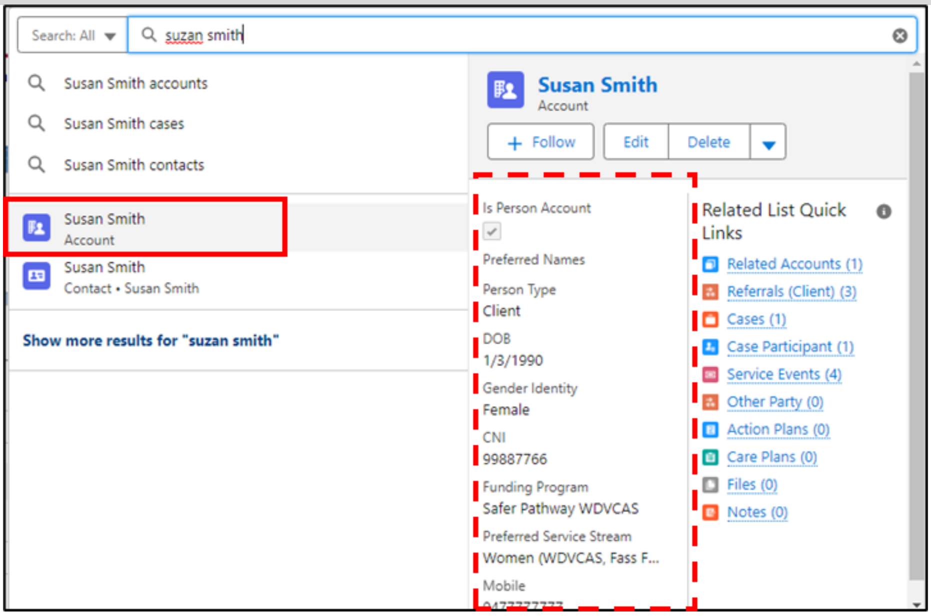
- Service events

The global search functionality uses ‘fuzzy search’, meaning the system will search for records that closely match the term you have entered including terms that are slightly misspelled.

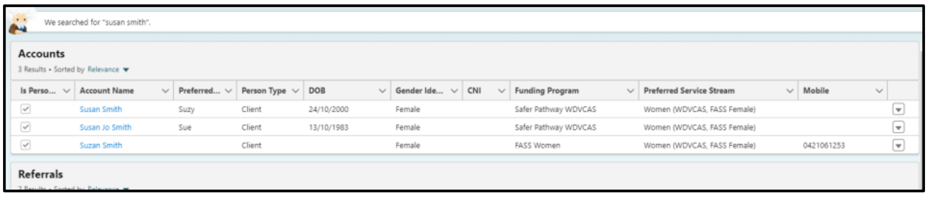
The global search function is recommended for searching for existing records (eg., client person accounts or referrals) that have already been created in the system. For example, you might use this search function when a client you have previously assisted calls your WDVCAS for support, to locate their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

Step	Description
1.	In the Global **Search** bar located at the top centre of your screen, enter the search criteria, for example: • Person name • Referral number (eg., REF-0000000251) • Case Number (eg., CA-00001176) • Service Event Number (eg., 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 cases that have not been created within your service area). 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.

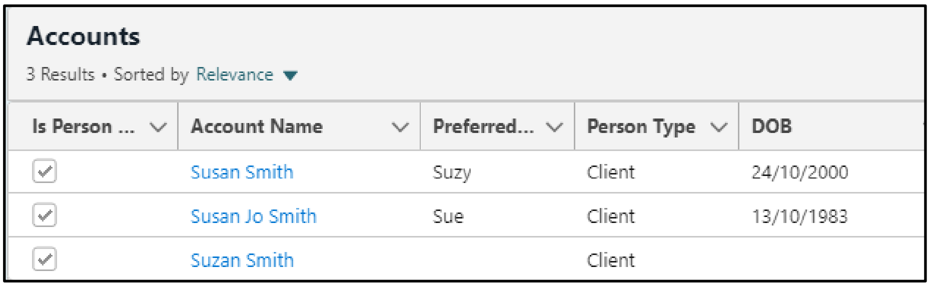
Step	Description



3. Or click enter to see all records in the system.



The 'Person Account' box indicates whether it is a person account, ie. If it is a service provider account, the box will be unchecked.



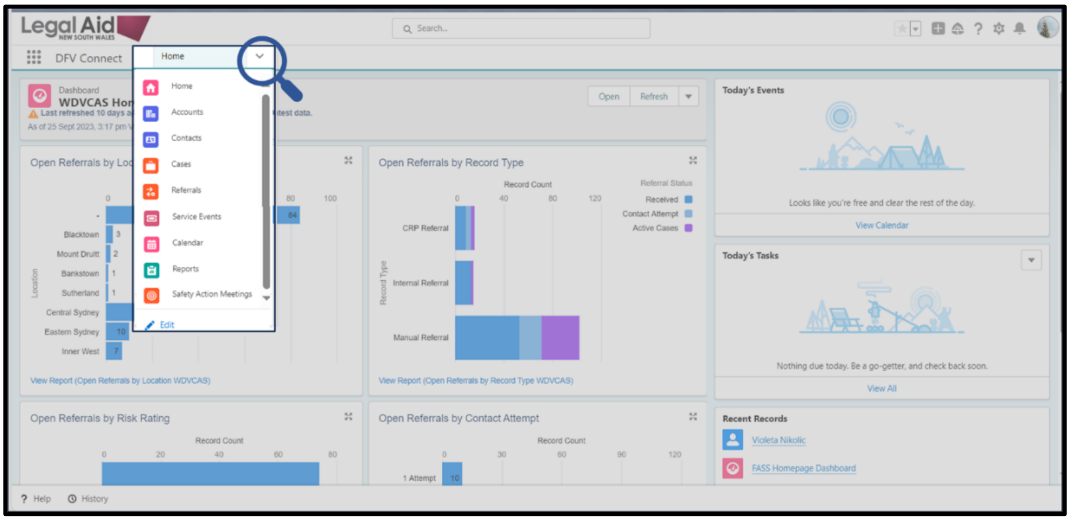
Accounts

3 Results • Sorted by Relevance

Is Person ...	Account Name	Preferred...	Person Type	DOB
✓	Susan Smith	Suzy	Client	24/10/2000
✓	Susan Jo Smith	Sue	Client	13/10/1983
✓	Suzan Smith		Client	

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 and for SAM Coordinators, Safety Action Meetings.



Main Menu record/component description

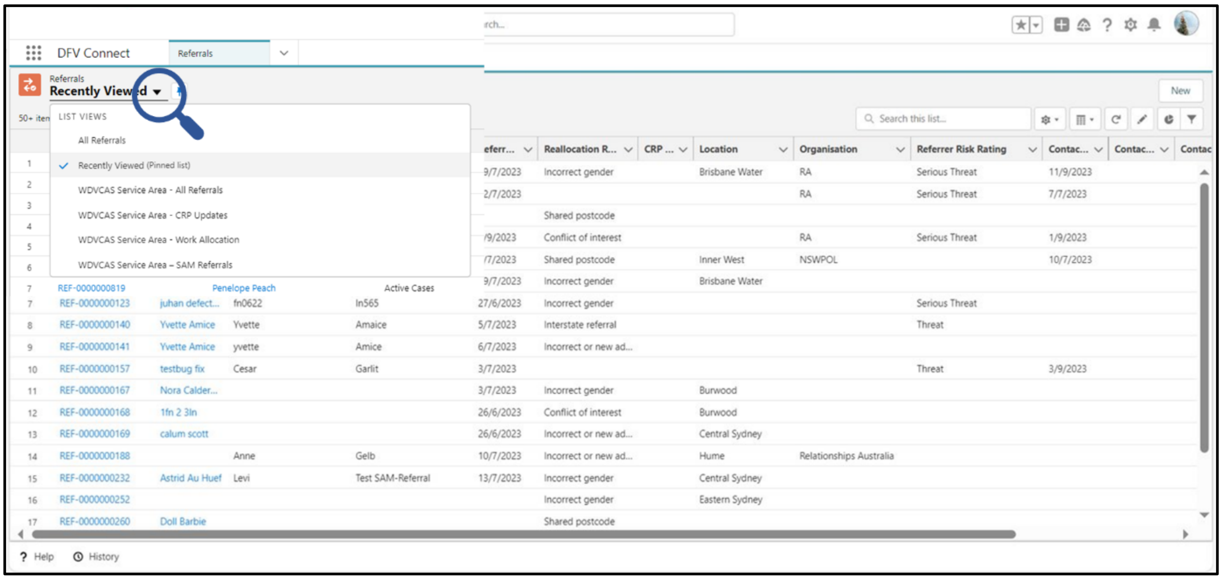
Main Menu Object	Description
Home	The Home page displays dashboard reports, notifications and access to daily tasks, events and recently accessed records.
Accounts	There are two types of accounts in DFV Connect: 1. Person Account (Client, Other Party and Dependant) 2. Service Provider (External Service 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, or a Safety Action Meeting members.
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.
Safety Action Meeting	The Safety Action Meeting contains all SAM records created within your service area. Note: A SAM record is the record of the safety action meeting (ie., the individual meeting, not the record of actions).

List views

List views display records (e.g., Referrals, Person Account, Cases etc,) in a table format for users to quickly see high-level information about a record. Selecting certain list views will display a list of records specific to what has been selected.

When selecting a component from the Main Menu such as Referrals users can access certain list views relevant to their required needs. For example, accessing the WDVCAS Service Area – Work Allocation list view when clicking on referrals will show all open referrals where consent status has not been recorded.



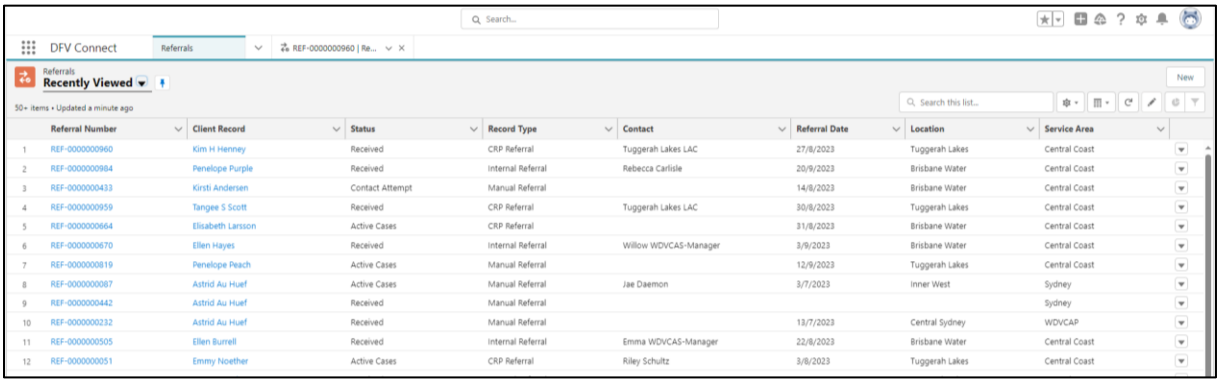
There are two options available for displaying records:

1. Table view

2. Split View

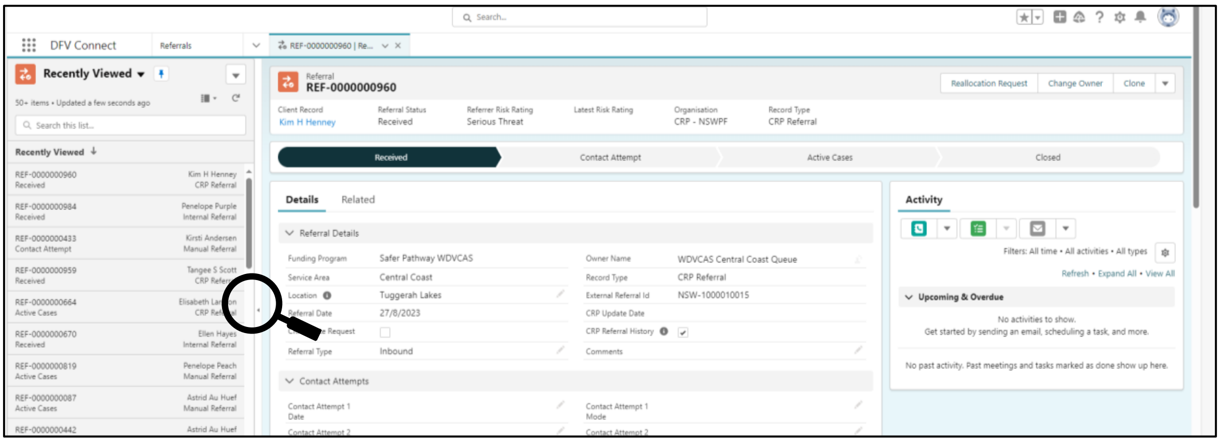
Table view

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.



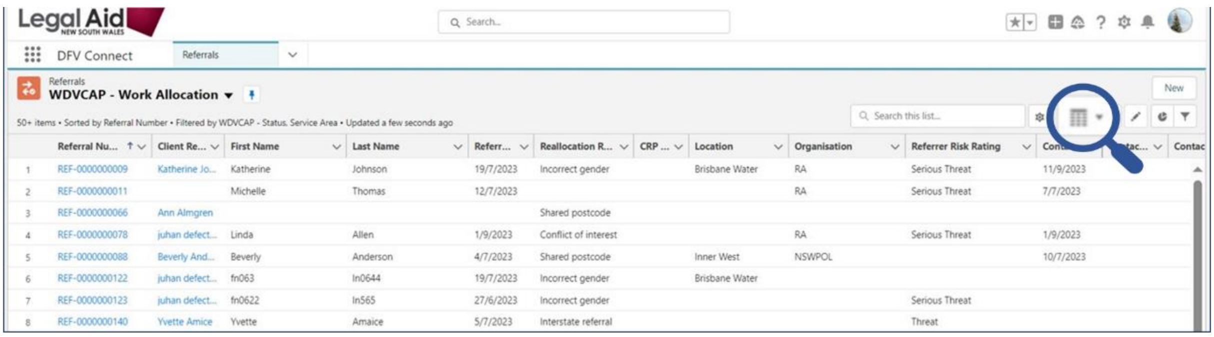
Split view

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.

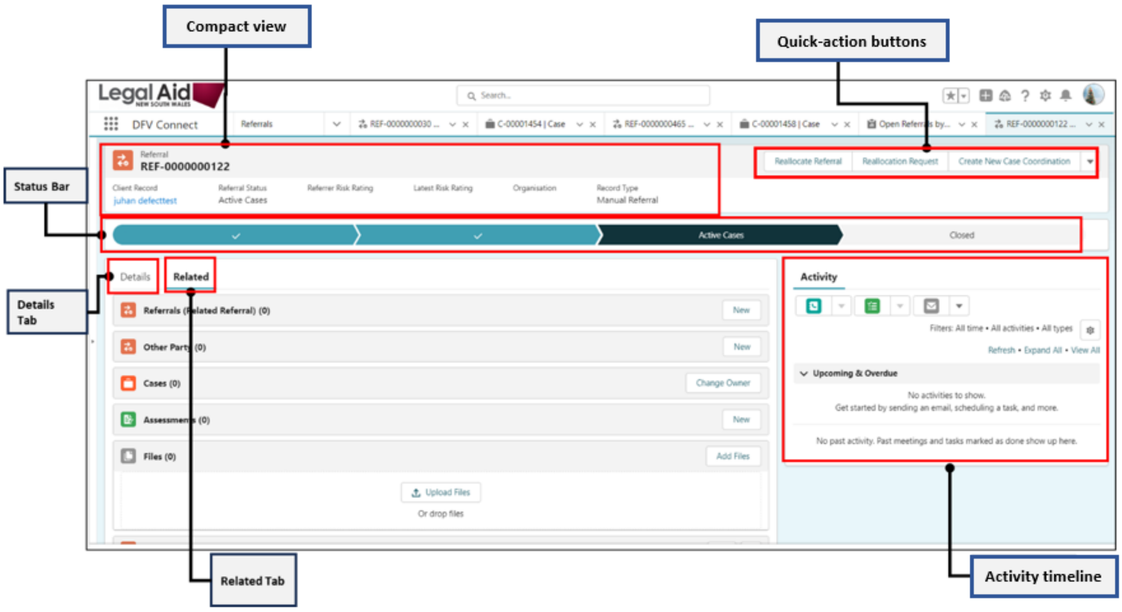
You can toggle between these views by selecting the table list display (magnifying glass below) and can view the entire record accessed by clicking on the small arrow in the centre of the pane (magnifying glass above).



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 (ie., 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.

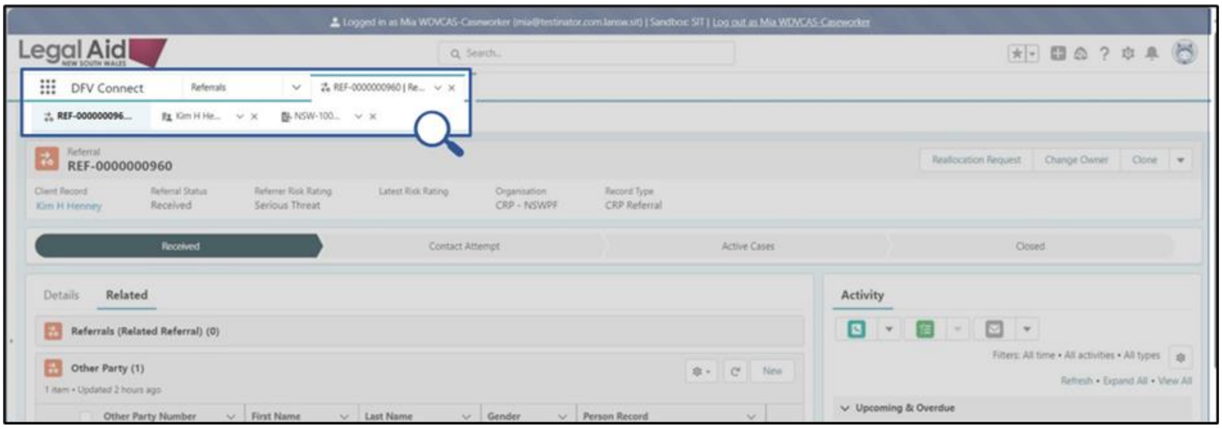
To access a certain record, click record number. For example, you can access a referral by clicking on the REF-00000122.



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 (eg., log a call, create a task or email). Once an activity is record, it will appear on the activity timeline.

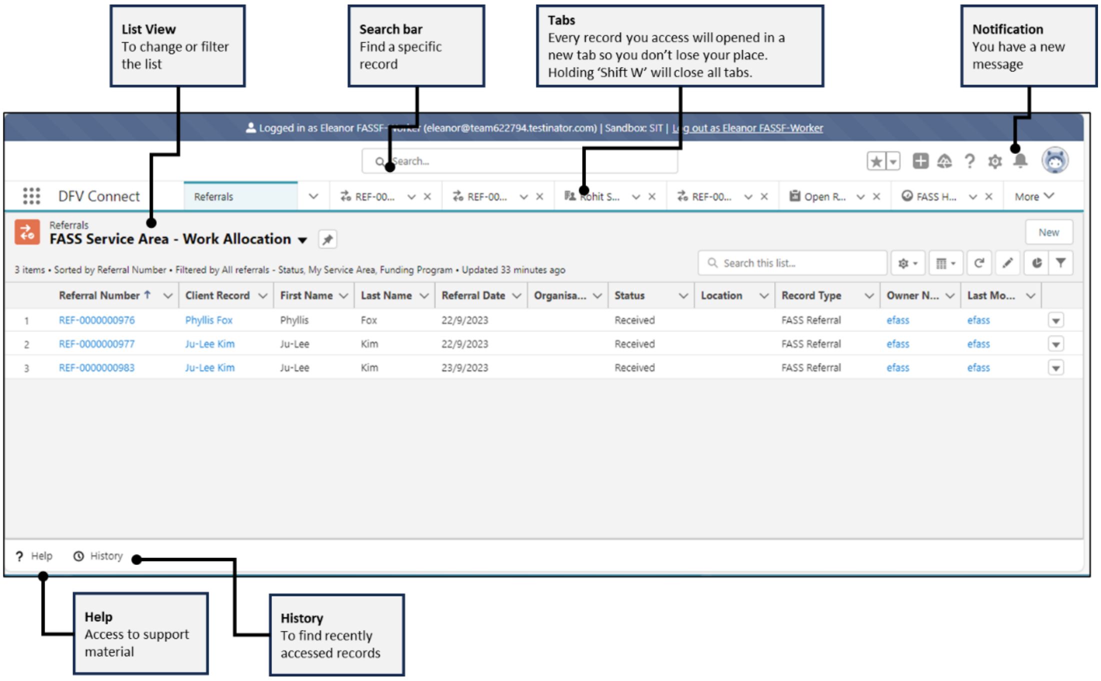
Opening multiple related records

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:

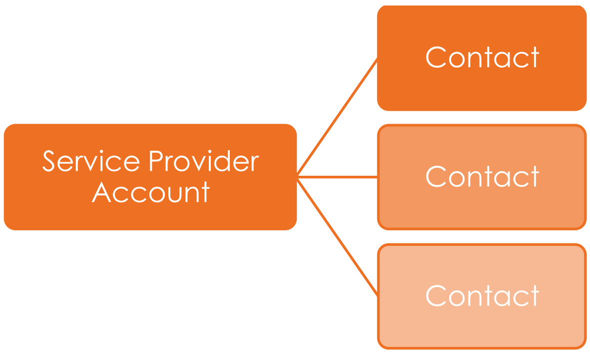
1. Person Account
2. Service Provider Accounts

Service Provider Accounts

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

These accounts are a good 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

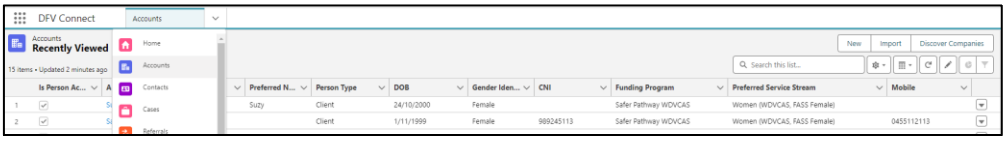
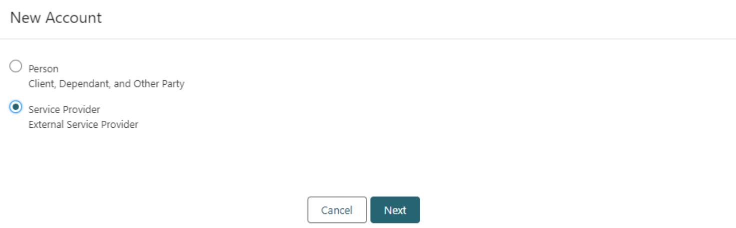
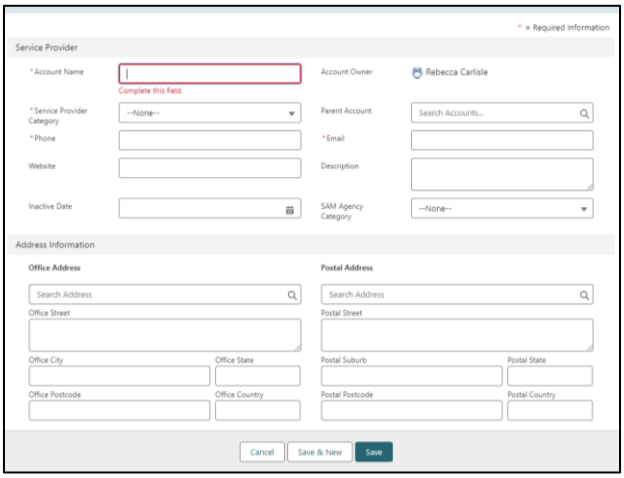
- Your **local external service provider** list maintained outside of DFV Connect should be updated with DFV Connect Service Provider Account name to avoid duplicates within the system. At a local level it is recommended that staff regularly review their local external service provider list on a quarterly 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>
</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.

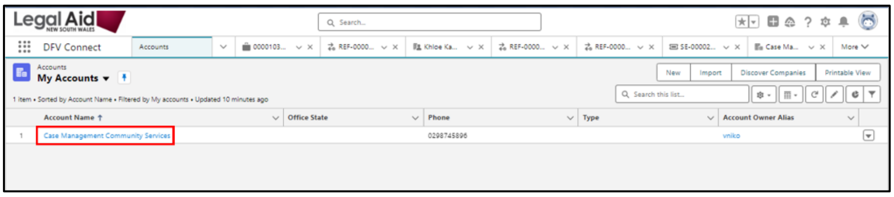
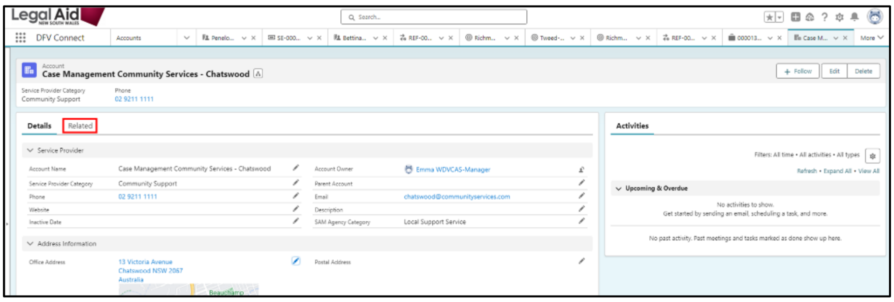
SAM agency category: The SAM agency category has additional values which should be entered when SAM coordinators create new SAM members. This information populates onto the SAM record and ensures all actions are properly tracked.</td></tr>
</table>

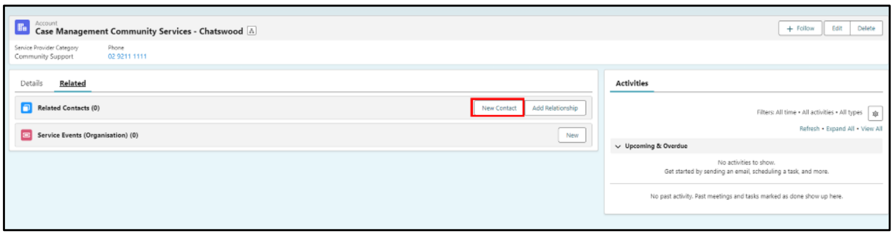
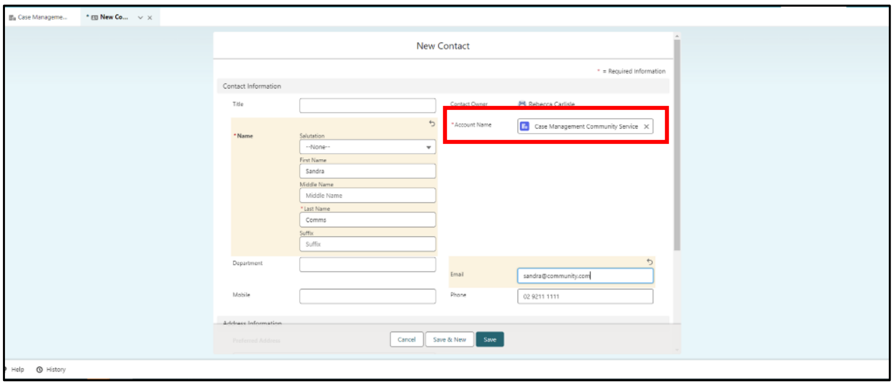
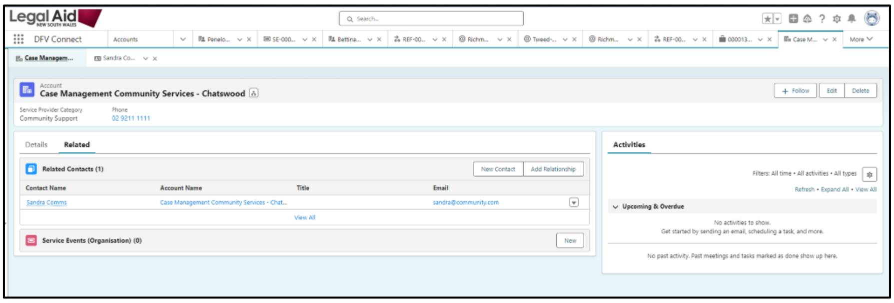
Step	Description
	External referral service event: The service provider account option is available on the external referral service event. **Remove service provider account:** To remove a Service Provider, you can do a global search to locate the account, click a pencil icon to edit and enter the date of inactivity.

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. 

Step	Description
4.	Select New Contact button to add an individual contact person. You can add as many individual contacts as required per service provider account. 
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. 

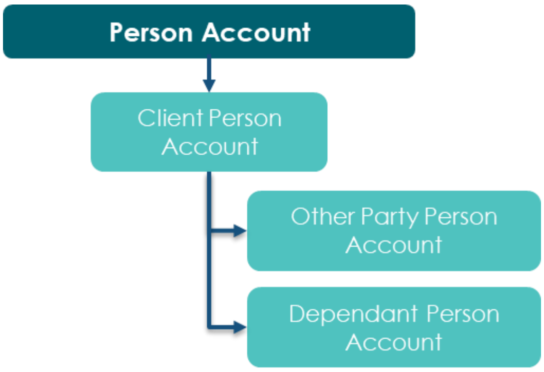
Person Account

The ‘Person Account’ in DFV Connect stores details and information about all WDVCAS 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 (ie. WDVCAS 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., CRP, 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' CRP referral which will be referred to a SAM.

Duplicate person accounts

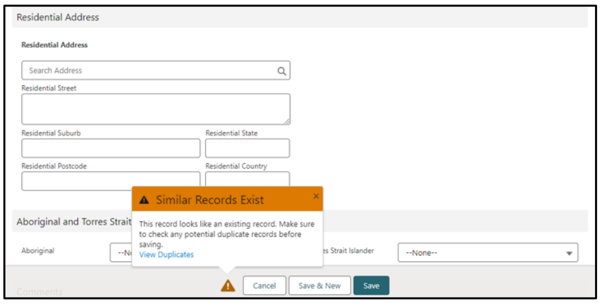
As it is general practice to check for an existing person before creating a new one, over time there should be less duplicate person records created. The system will identify duplicates where the first name, last name, funding program (WDVCAS, FASS Women, FASS Men) and either:

- Date of Birth
- Email
- Street and city or postcode

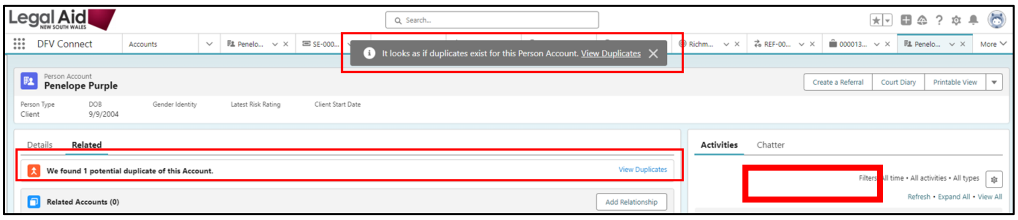
- Mobile
- Work phone

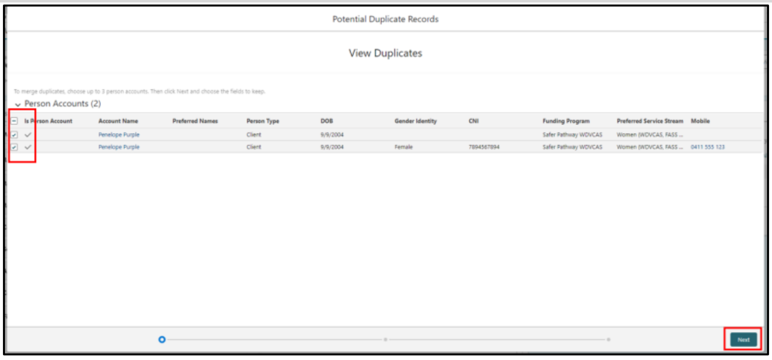
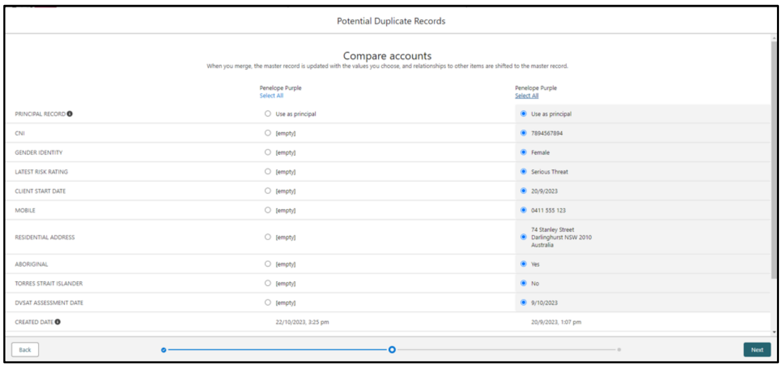
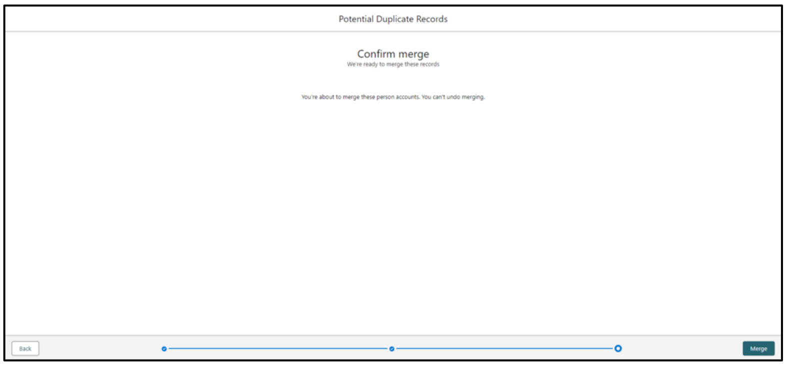
are a match or a partial match. For example, it will identify Amanda Smith and Amanda Smith with the same address as being a potential duplicate.

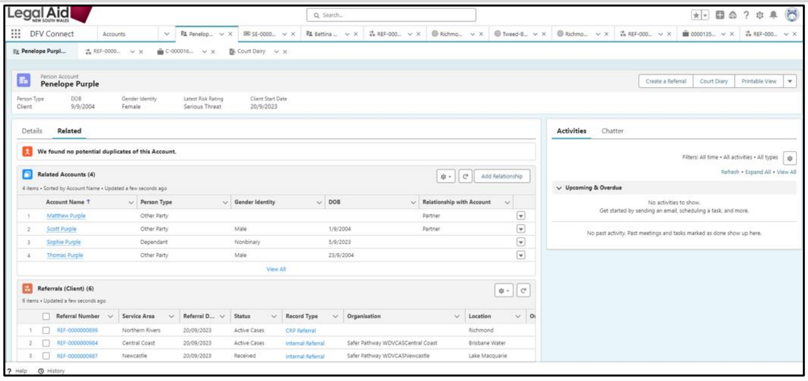
- Only Managers and assistant managers have permissions to merge duplicate accounts.
- Where you identify a duplicate account, contact your manager to about merging the duplicate account.
- If you are creating a person record and the system recognises there is a potential duplicate you will receive a 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.** 
	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 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**.

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

Step	Description
	

Referrals

WDVCASs receive referrals for women experiencing domestic and family violence from a variety of sources including NSW Police, Local Courts, victim-survivors themselves, other WDVCASs, FASS Social Support Services and external service providers.

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

All referrals are marked with prefix REF-

These referrals are recorded in DFV Connect as three different types of referrals:

1. **CRP Referrals:** referrals received from the CRP and processed by NSW Police and Local Courts
2. **Manual Referrals:** referrals manually entered in the system, including self-referrals and referrals received by external service providers
3. **Internal Referrals:** referrals made internally through DFV Connect by DFV Connect users, for example, referrals made from one WDVCAS to another (eg., client lives within your service area but has a court appearance at another service area, or from a FASS Social Support Service to a WDVCAS)

Referral Status

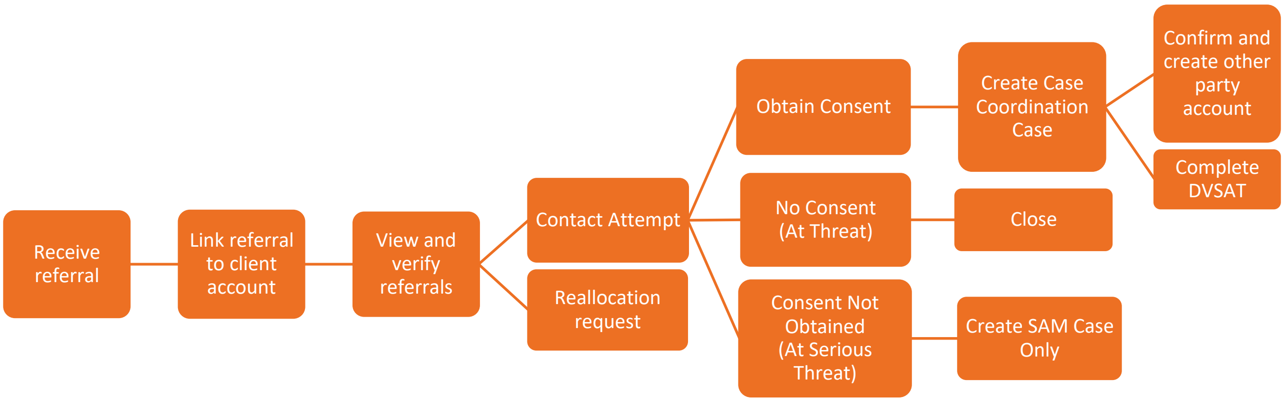
Referral Status	Description
Received	Initial referral status – ie, 'new'.
Contact Attempt	Contact attempts are being made on the referral – this status must be selected to record contact attempts.
Active Cases	Where there is an active case created from the referral.
Closed	Closed status - referral can only be closed when all services are complete and all associated cases must closed to close the referral.

Process CRP referrals

WDVCAS staff must manage all referrals received.

Please note: process outlined is primarily applicable to CRP Referrals but should also be applied to referrals received externally from the system and processed as Manual Referrals.

Process Overview



Access referrals

Description

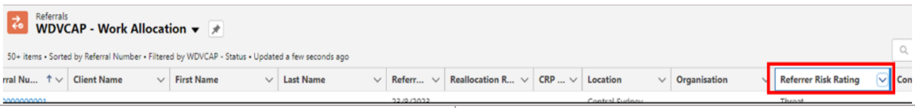
Referrals (CRP, Manual and Internal) can be accessed by selecting 'Referrals' from the main menu. Once selected, you can access certain referral list views to see information about referrals. There are four list views specifically designed to assist you with your work:

Name	Description
WDVCAS Service Area – Work Allocation	All open referrals for your service area where consent has not been recorded and should be used for making contact attempts.
WDVCAS Service Area – All Referrals	All referrals within your service area.
WDVCAS Service Area – CRP Updates	All open referrals with a CRP update within your service area.
WDVCAS Service Area – SAM Referrals	All open referrals with a risk rating of serious threat within your service area.

All list views with prefix 'WDVCAS Service Area' only display referrals within your assigned service area.

Practice Rules

- The 'WDVCAS Service Area – Work Allocation' list view must be checked reguarly throughout day.
- The 'WDVCAS Service Area – CRP Updates' list view must be checked regularly (3 times per day) as the work allocation list view only displays referrals where consent is not yet recorded. As all referrals remain open until all services are complete and cases are closed, this list view will display those referrals where consent is recorded and services are being provided.

<table>
<tr><th>Function/Field</th><th colspan="2">Description</th></tr>
<tr><td>Sort columns</td><td colspan="2">• All lists are default sorted by date
• You can sort columns depending on your need, for example, you can sort a list column and by referrer risk rating to see referrals sorted by at threat/at serious threat

</td></tr>
<tr><td rowspan="2">CRP Referral Flags</td><td>5-day KPI Breach</td><td>• Flag to identify when a referral is reaching the 5-day KPI breach or is in breach</td></tr>
<tr><td>CRP Referral Update</td><td>• Flag to identify when a CRP Referral update has been received</td></tr>
<tr><td>Location</td><td colspan="2">• You can use the search bar to view referrals for a specific location only</td></tr>
<tr><td>Client Record</td><td colspan="2">• You can see if a person has been linked to a client record when the ‘Client Name’ column is filled</td></tr>
<tr><td>Pin icon</td><td colspan="2">• List views can be pinned for your most frequently viewed list. You can click on the icon to pin preferred list view as a favourite.</td></tr>
</table>

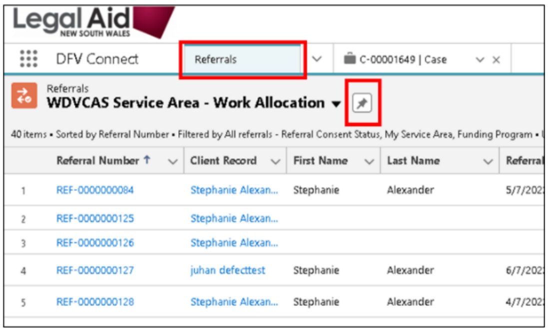
WDVCAS Service Area – Work Allocation List View

The WDVCAS Service Area – Work Allocation list view is the **main** list view you will use to process referrals. This list view displays all open referrals are where consent has not been recorded.

Key fields in this list view include:

- **Client information:** Client Record, Client Name
- **Referral information:** Referral Number, Referral Date, Referral Flag, Service Location, Referrer, Record Type, Referrer Risk Rating, Status
- **Contact attempt information:** Contact attempt dates 1, 2 and 3

Process Steps

Step	Description
1.	From the **Main Menu** drop down, select **Referrals**. From the List View drop down, select the **WDVCAS Service Area – Work Allocation**. 
NOTE	Next to the List View title Service Area – Work Allocation is a push-pin icon. You can click on the icon to pin this list view as a favourite.
2.	The list will display all referrals that have been allocated to your Service Area requiring action. This means that the consent status has not yet been recorded for these clients.

Assign referrals (optional)

Description

Some service areas may like to assign received referrals to manage their daily workload. All referrals in DFV Connect can be assigned to staff by changing the 'owner name' - this process is optional.

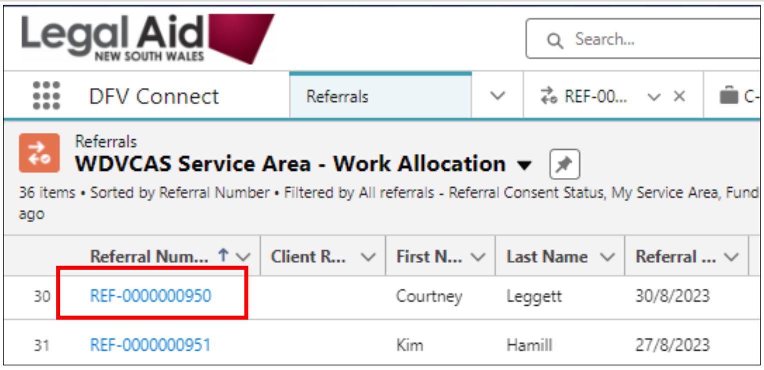
Changing the owner does not affect other users accessibility or ability to update the referral at any time.

Practice Rules

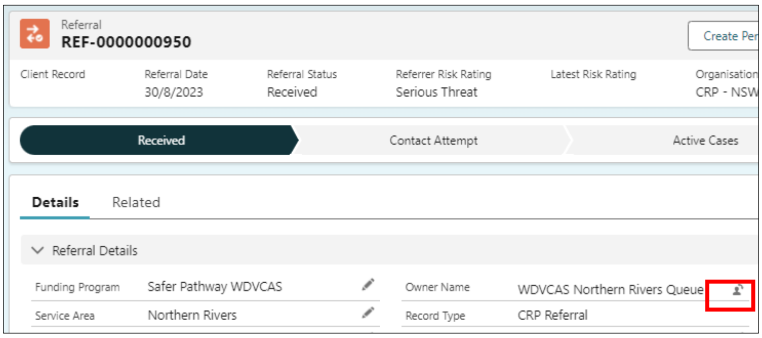
- All staff within the allocated service area can work on CRP referrals at any time (including when it is not assigned to them). For example, if a client calls while the referral is assigned to another staff member, all other staff members can continue to support the client.

Process steps – assigning an individual referral

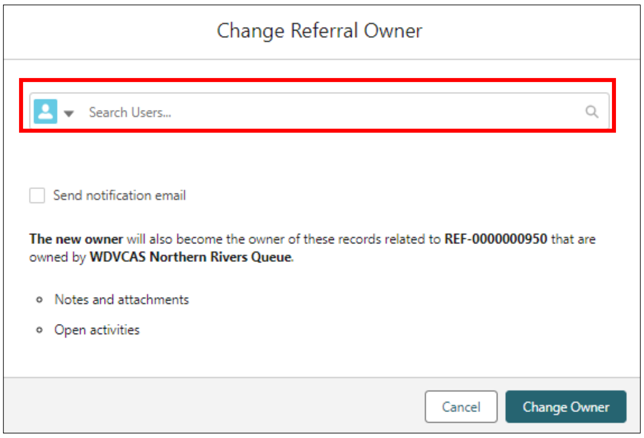
Step	Description
1.	**To assign individual referral** Click on the *Referral Number* on the **WDVCAS Service Area – Work Allocation** list view to open a referral for assignment.

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


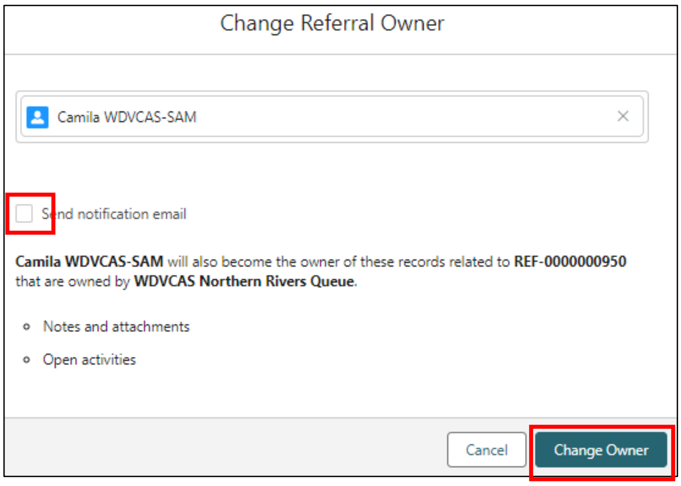
</td></tr>
<tr><td>2.</td><td>
On the referral record, click on person icon to the right of the current Owner Name to open the Change Referral Owner screen.



</td></tr>
<tr><td>3.</td><td>
Type in the name of the user to be assigned to in the Search Users box. Names of users matching the entered text will appear below this box. Click on the username from the list once the right username is displayed.



Note: Only assign referral to users within the same referral's Service Area.
</td></tr>
</table>

Step	Description
4.	Once the **username** is populated and the **Change Owner** button to complete the assignment. The system would automatically send the new Owner a notification email if '**Ticking the Send notification email'** box is ticked. 

Link referral to client person account

All referrals (received from the CRP, internally referred or manually created) must be linked to a client person account to obtain a complete client and referral history and to prevent 'orphan' referrals within the system. This is regardless as to whether they become a *client* or not.

To link a referral to client account:

1. Search for an existing client in DFV Connect (either from the referral or using global search function)
2. Where the client exists, select the client account and link to referral. Where a client does not exist, you can easily create a client using the **Create Person Account** button in the top righthand corner and automatically link a client account to the referral.

While you are linking the referral to a client person account, the client's actual start date will be recorded when the **first case has been created** for the client.

Practice rules

- **CRP referrals where no information is provided or is 'unknown'**

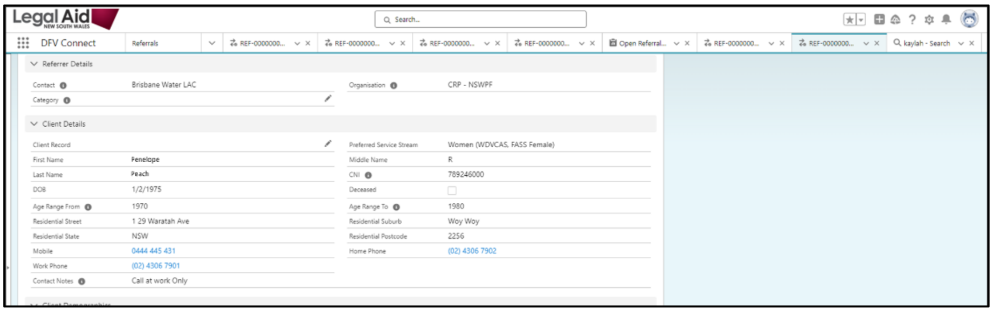
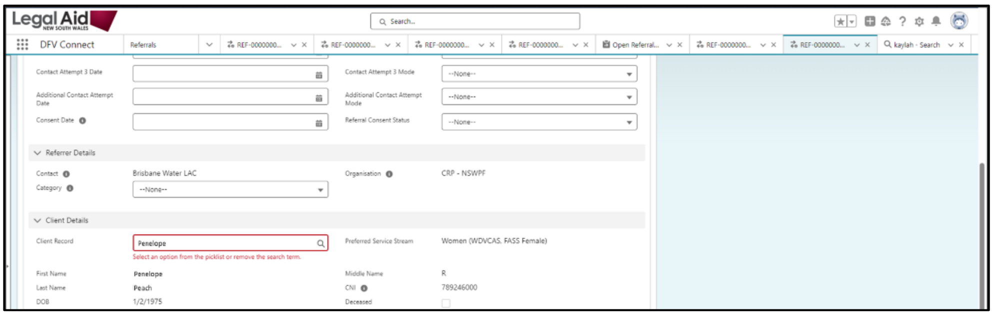
Where the client's name is unknown or is missing, you should contact the DVO for the client details and then link/create a person account (see process steps) by manually entering their information to the client person account. If you are unable to obtain any information, contact the victim to seek more details or close if you cannot obtain any contact information.

- **Manual referrals where no name is provided**

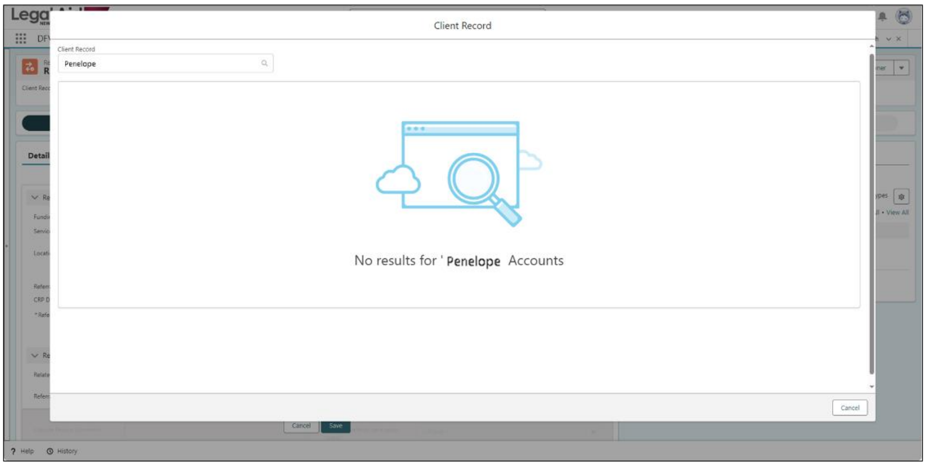
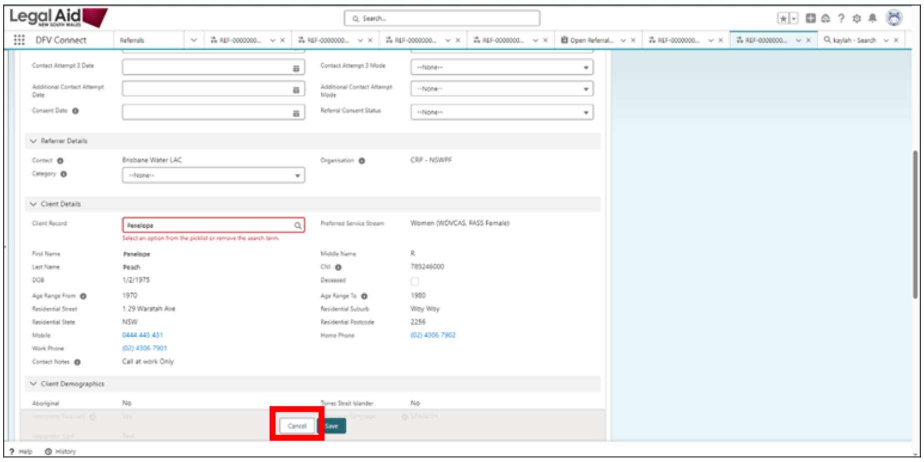
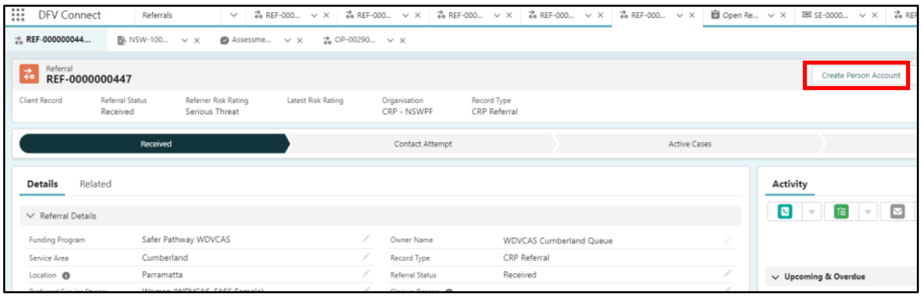
In instances where no name is provided (eg., self-referral who does not disclose their name), you can create a manual referral and link this to an ‘unknown’ client account. To ensure these referrals are correctly managed, we have created one ‘unknown’ person account for each service area - with first name as ‘unknown’ and last name as the name of the service area. For example, South West Sydney will have a person account, ‘Unknown South West Sydney’ to link these unknown referrals to. See process steps below on how to link these unknown referrals.

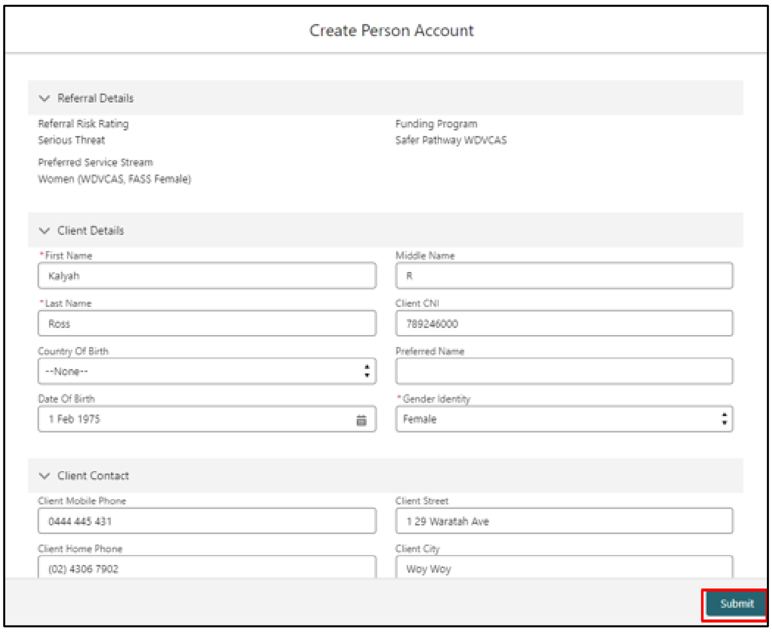
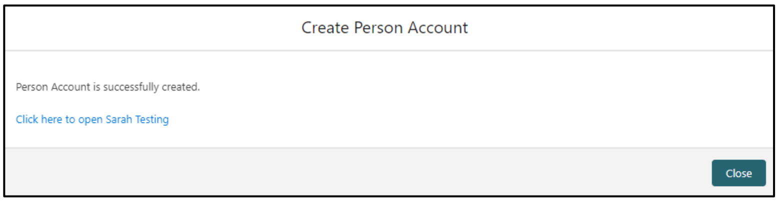
Create and/or link to client person account

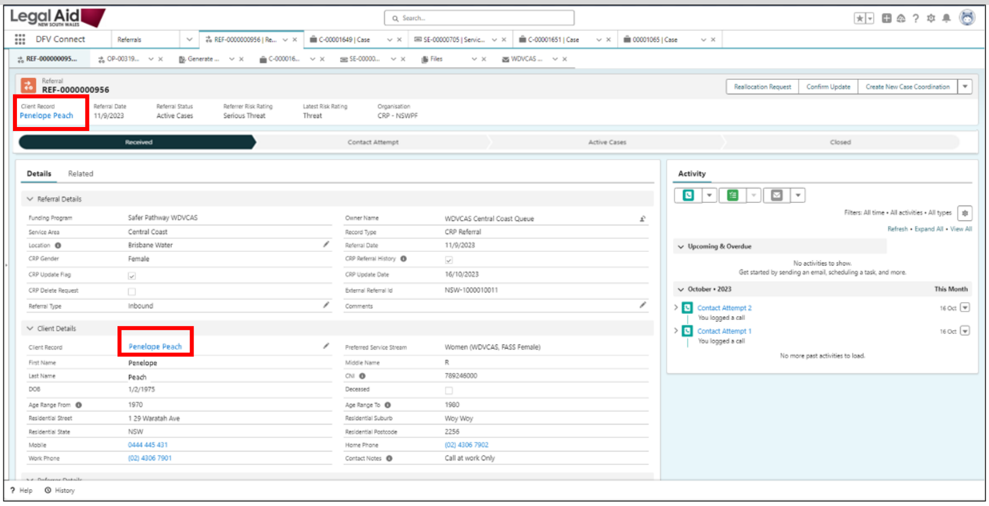
Process steps

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>Open referral and click on the pencil (edit) icon next to the Client Record field.

</td></tr>
<tr><td>2.</td><td>Search for client in the Client Record field. It is important that you always search for the client person account to avoid duplicates and ensure the client’s history is properly recorded.


In instances where the client’s name was not provided or is ‘unknown’, search for ‘Unknown [Service Area]’, eg., ‘Unknown South West Sydney’. Each service area can use this account to link these unknown referrals to, so they are properly recorded.</td></tr>
<tr><td>3.</td><td><table>
<tr><td>If the search results shows that client record does not exist</td><td>Go to step 4</td></tr>
<tr><td>If the search results shows that client exists</td><td>Go to step 11</td></tr>
</table></td></tr>
</table>

Step	Description
4.	If the search result does not show client record exists in the system, close the **Search result** window. 
5.	Click on the **Cancel** button to close the edit mode. 
6.	Use the **Create Person Account** button in the top right-hand corner to create person record and link the referral to a new client account.  Note: The **Create Person Account** button pre-populates the information from the referral onto the person account, unfortunately creating a new client account from the client record field does not have this function

Step	Description
7.	The *Create Person Account* quick-action pop-up will be displayed. The information on the referral will be pre-populated onto the client person account. Enter as many **Client Details, Contact** and **Demographic** information as you can. Click **Submit** to save.
8.	 **Note:** This is a 'quick-action pop-up', you can add additional details once you have checked submit and created the client account (ie., click on the hyperlink client name).
9.	The success pop-up screen will display. Select Close. 
10.	The client person account is now created and/or linked to the referral record.

Step	Description
	 **Note:** To access and view the client account click on the blue hyperlink of the client's name.
11.	• If the search results display that the client exists with an Account, and you are sure this is the correct client record select it. Ensure that the details are correct before linking the client to the referral. • If the search result displays multiple client accounts, please review each of these client records and then select the most appropriate. Refer to Merge duplicate person records if there are multiple accounts for the same person.
12.	After you have created the person account from referral or linked referral to an existing client account, you will attempt contact and record consent.

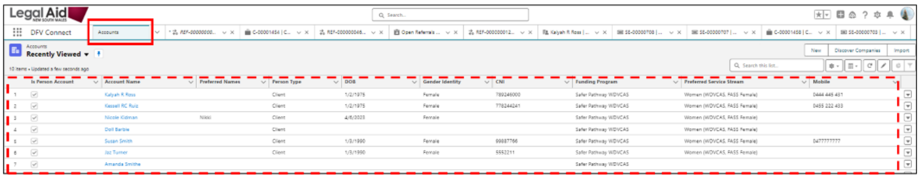
View client history

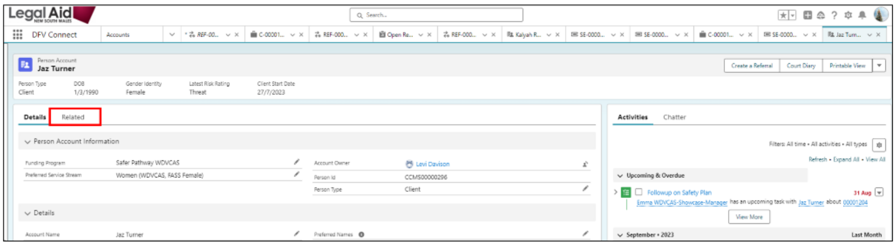
All information and data about your client in DFV Connect is stored within their client person account.

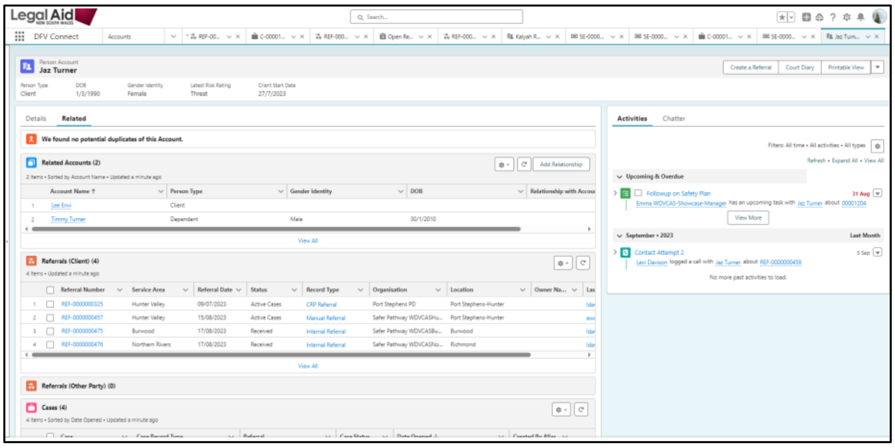
Once you have linked the referral to the client person account, you can review the client's history by looking at the related tab on the client's person account. You can do this to get an understanding of your client's history with WDVCASs and view their details.

Process steps

Step	Description
1.	To search for the client person account, select **Accounts** from the Main Menu (You can also use the **global search** to find your client, however this searches for every record type in the system).

<table>
<tr><td></td><td>To access the account, click on the hyperlink in the account name.
</td></tr>
<tr><td>2.</td><td>The Person Account screen will be displayed.

The Details tab displays information about the person (Personal details, Residential Address, Other Address, Contact, Aboriginal and Torres Strait Islander, Demographics, Health, Dependent Child Information, Client Information, Comments).

Click on the Related tab to view related records and information about the client.</td></tr>
<tr><td>3.</td><td>The related tab displays all associated records for the client, including:
Related accounts - any other person records that have a relationship with this person e.g. If you are viewing a client, you will be able to see the related Other Party and Dependent Children person accounts.
Referrals (Client) - all referrals where the person is the client
Cases – all cases for the person
Service events – all service events created for this client
Referrals (Other Party) – all referrals where the person is the other party
Case Plans – all case plans for the client
Assessments – all DVSATS completed within DFV Connect for the person
Files – files uploaded to the person account. It is not recommended that files are uploaded to person account as these are visible by all service areas and file</td></tr>
</table>

		information should be stored in your client's **case**. 

View CRP referrals

Description

NSW Police Force and Local Courts referrals are processed through the Department of Communities and Justice (DCJ) system, the Central Referral Platform (CRP). These referrals are received in DFV Connect and are indicated by the 'referral type' being CRP Referral.

It is important to view information on referrals to check they have been correctly received and assigned to the correct service area and location. If there is an incorrect allocation (eg., incorrect postcode), you must still link the referral to client person account before processing a reallocation request.

POI aged under 10/Victim aged under 16

If you receive a CRP referral and the POI is under 10 years old and/or the victim is under 16 years old:

- Email the DVO to check the date of birth is correct and has not been entered in error.
- If DVO confirm the POI's is under 10 years and/or the victim is under 16 years, close the referral on the system as an 'Incorrect Referral'.
- For further details on how to record this as a contact attempt refer to 'Referrals - Record Contact Attempts'.

Practice Rules

- You should review the referral information, including the Other Party and DVSAT prior to making contact attempts so you have an understanding about the client's situation.

Notes

- Referrals in DFV Connect are treated as a reference record of the information received and can be updated with processing information. E.g. contact attempts. Information relating to the client are now stored on the Person Accounts and support provided are stored in case and court diary records.

- As such, almost all fields on a CRP referral fields **cannot be edited**. This is because any updates received by police will override any changes made in DFV Connect. You can edit some fields on the CRP referral that will not be affected by CRP referral updates.

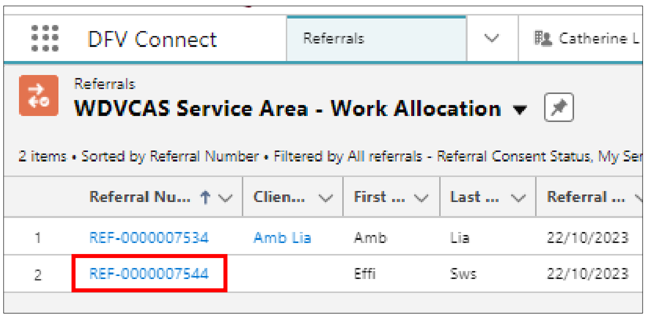
Key Fields	
Field Name	**Description**
Preferred Service Stream	Indicates the gender from the CRP referral. All referrals received should be marked as 'Female (WDVCAS, FASS Female)
Contact	Indicating the name of the referrer/LAC
Organisation	Indicating the referring organisation or PAC/PD who made the referral
Delete request	Indicated by the CRP delete request box being ticked in the referral details section on the referral. CRP delete requests mean: • the client may not be a victim of Domestic and Family Violence for the incident and/or • the referral has changed, e.g., the ADVO has been withdrawn

View Referral Information

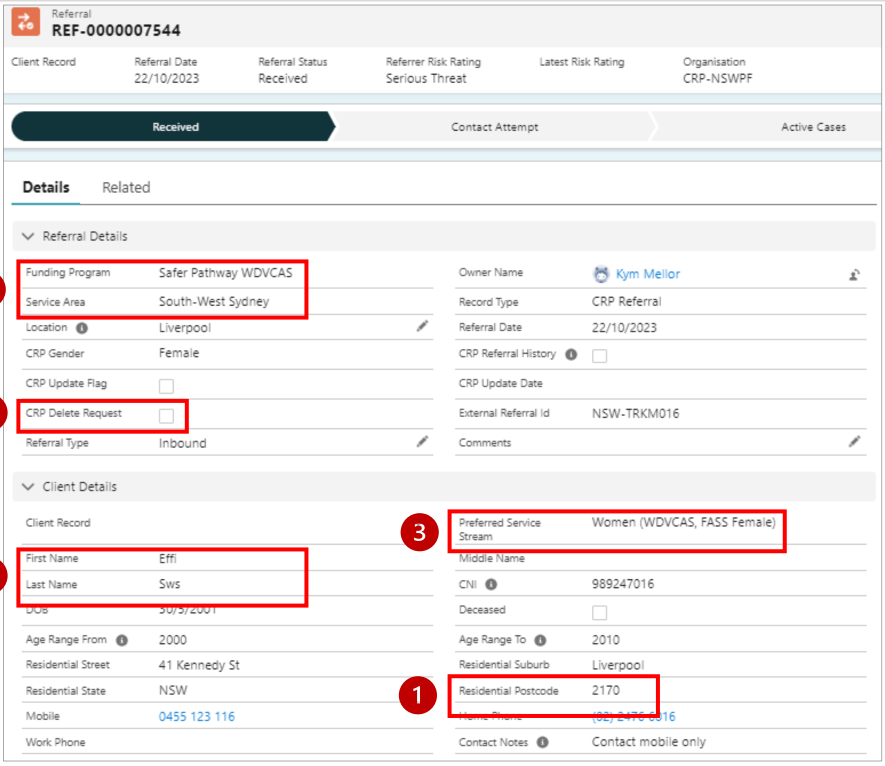
On the details tab of the referral, you should review the below to ensure the referral is correctly allocated:

- Funding program and service area
- Client's names
- Client's address and postcode
- Preferred service stream
- Delete request field

Process steps

Step	Description
1.	Click on the *Referral Number* link of the referral to be verified on the WDVCAS Service Area – Work Allocation List View to open the referral. 

2.	On the details tab of the referral, review the followings: 1. **The Funding Program and Service Area are correct for residential address.** If the postcode is a split postcode or incorrectly allocated to the *Service Area* see Reallocating referrals (reallocation request) on how to reallocate the referral to WDVCAP. 2. **Client's names are present** If there's no names provided on the referral, you should contact the DVO for the client details and then link/create a person account with the correct details provided. If you are unable to obtain any information, contact the victim to seek for more details or close if you cannot obtain any contact information. 3. **Preferred Service Stream is Women (WDVCAS, FASS Female).** If it's not, proceed to the Reallocating referrals (reallocation request) section to send to referral to the WDVCAP Unit. 4. **Delete request field is unticked.** If the field is ticked, and if the referral is to be deleted (i.e., closed), then record actions/outcomes in the contact attempts and consent section on the referral, enter comments using the log a call function in the referral activity timeline, update the referral status from contact attempt to closed, and use the 'incorrect referral' option in your dropdown closure reason list. If the referral is to be deleted (i.e., closed) and you still have concerns for a client's safety and are unsure of next steps, discuss with your Manager and/or DVO, before closing the CRP referral without attempting contact. These cannot be returned as reallocations.



Proceed to view referrer's assessment and other party information where referral has been correctly allocated.

3.	If all referral details are verified and confirmed that it has been correctly assigned to the correct service and location, start the contact attempt process.	If referral is not correct (wrong gender, postcode is not correct, shared postcode, conflict of interest) please reallocate referral back to WDVCAP Unit (see Reallocating referrals section of this manual). **IMPORTANT:** Before reallocating referral you first need to link referral to a Client Account.

View referrer's assessment (DVSAT) and Other Party information

Review DVSAT and Other Party information on the referral received to ensure you have reviewed all referral information and understand the client's situation before attempting contact.

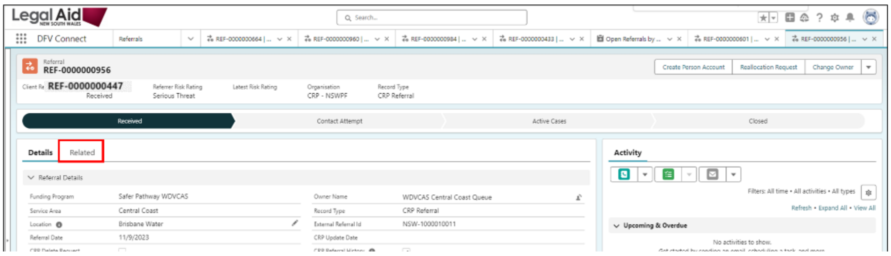
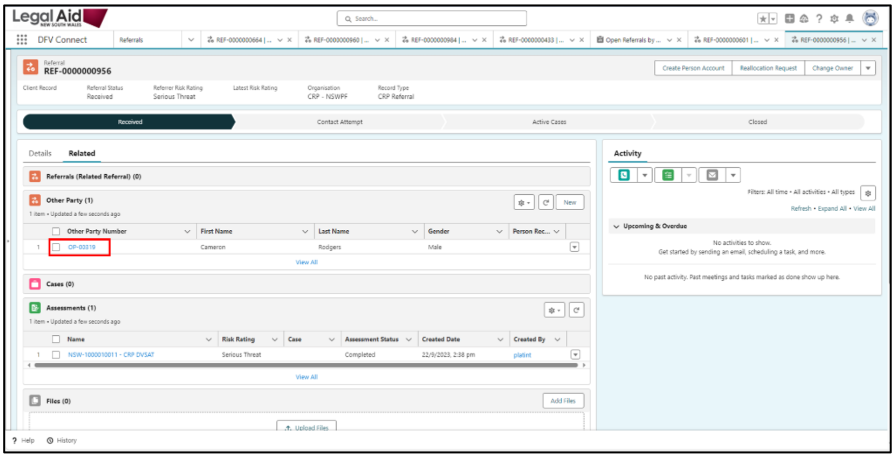
When reviewing DVSAT information review the:

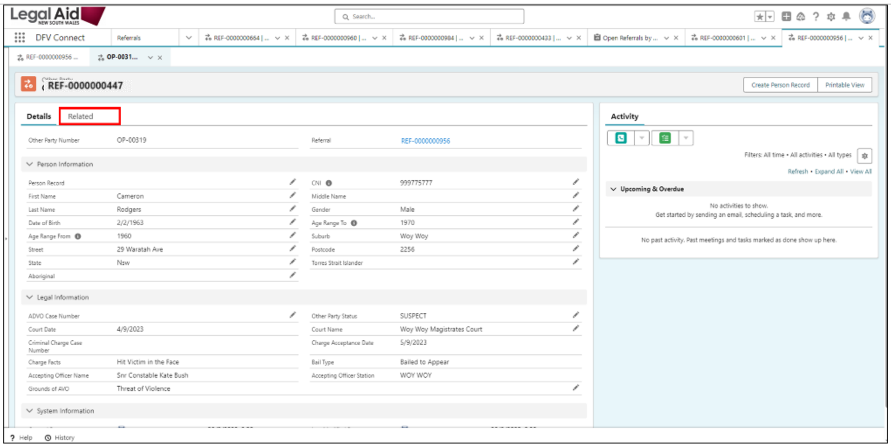
- Referrer risk rating
- Questions
- Comments

Notes

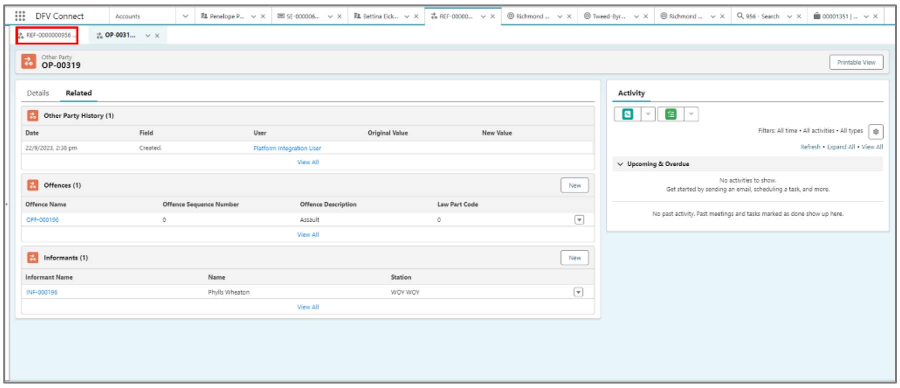
Where the referral has been linked to an existing client account, the *Latest Risk Rating* field on the *Person Account* is shows the rating from the most recently completed DVSAT by any users within the same funding program. This rating may be relating to a separate incident and/or referral and may not reflect the risk rating of the new referral received.

Process steps

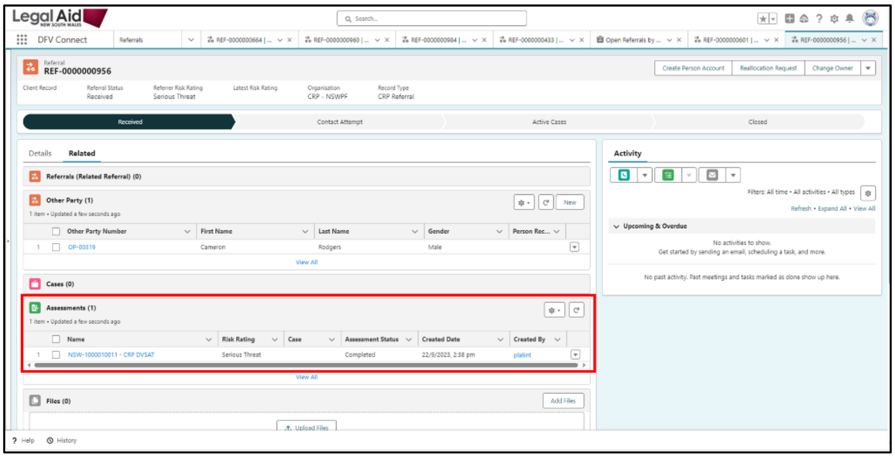
Step	Description
1.	From the referral screen click on the Related tab. 
2.	The Related tab displays information from the CRP about the other party and the DVSAT results. Click on the Other Party link OP-XXXX to view their personal details and legal information including the Grounds of the AVO. 
3.	When you select the Other Party link the Other Party details are displayed. You can review information about the other party and the legal information including AVO details and ‘Grounds for AVO’ information. Click on the Related tab of the other party record.



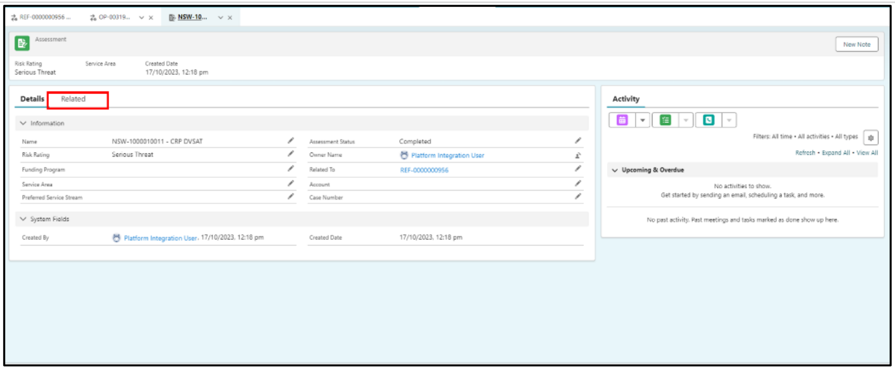
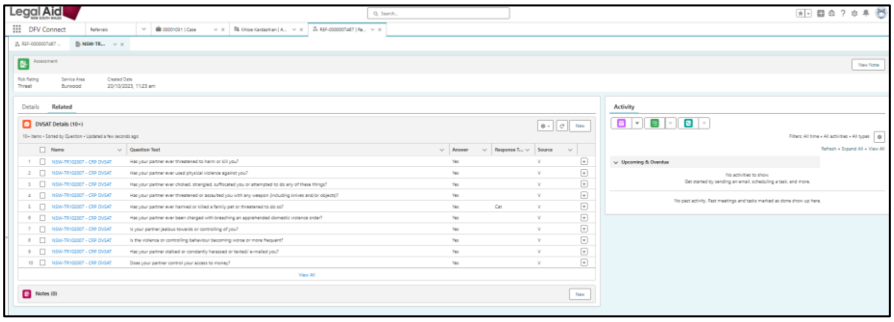
4. View the information about offences and informants. Go back to the referral by selecting the referral tab.



5. In DFV Connect, all DVSATS are created as an Assessment. To view the CRP referral's threat assessment, click on the blue hyperlink to view the DVSAT made by the referrer.



6. The details page shows an overview of the DVSAT made by the NSW Police. Click on the **related** tab.

	
7.	Review the DVSAT responses. The screen will display the answer and comments for each question. 
8.	If all referral details are verified and confirmed that it has been correctly assigned to the correct service and location, start the [contact attempt process.] If referral is not correct (wrong gender, postcode is not correct, shared postcode, conflict of interest) please reallocate referral back to WDVCAP Unit (see [Reallocating referrals section] of this manual). **IMPORTANT:** Before reallocating referral you first need to link referral to a Client Account.

Record Contact Attempts

Description

There are two activities to record contact attempts made on a referral:

1. Recording the date and mode on the **referral under contact attempts and consent.**
2. Recording a contact attempt comment using the **call function in the referral activity timeline**

You will only be able to record today's date on the referral record. The WDVCAP Unit can back-date a contact attempt if required. This action can only be performed in limited circumstances.

As part of Safer Pathway, WDVCASs are required to attempt to contact each woman referred to them by the end of the next business day. For example, if a referral is received at 10:00 am on Monday, WDVCASs must attempt to contact the client by 5:00 pm Tuesday. If a referral is received at 4:00 pm on Friday, the WDVCAS must attempt to contact the client by 5:00 pm Monday.

WDVCASs should attempt to contact clients by telephone. If a client does not answer, WDVCASs should attempt to contact them at least another two times by phone within five business days.

Practice rules

a. WDVCASs should record all attempts to contact a client within DFV Connect so these are properly reported on.
b. As part of Safer Pathway, initial contact is to be attempted within one (1) business day of receiving the referral on the system.
c. If you are unable to attempt contact because there is no phone number listed, an old or incorrect number, or there is a 'CRP delete request', then your first attempt is still to be made by the next business day. WDVCAS workers should contact DVOs to try to obtain current contact details for the victim, or confirm the CRP delete request. Record your actions as a **contact attempt 1** in the contact attempts and consent section on the referral and enter comments in the activity timeline, e.g., "I emailed the DVO for contact information" or "I emailed the DVO to confirm the CRP delete request". Your second (2) and third (3) contact attempts will be noting the outcomes of those actions, and the referral should be closed within five (5) business days. Referrals should not be kept open waiting for information to come in, they can be re-opened again if required.
d. If you receive a CRP referral and the POI is under 10 years old and/or the victim is under 16 years old, email the DVO to check the date of birth is correct and has not been entered in error. This action would be recorded as your first contact attempt in the contact attempts and consent section on the referral and enter comments in the activity timeline. If DVO confirm the POI's is under 10 years and/or the victim is under 16 years, record this information in the activity timeline and close the referral on the system as an 'Incorrect Referral'.
e. If you receive a 'CRP delete requests', the CRP delete request checkbox in the referral details section on the referral will be ticked. CRP delete requests mean:
    - the client may not be a victim of Domestic and Family Violence for the incident and/or
    - The referral has changed - eg., the ADVO has been withdrawn

If the referral is to be deleted (i.e., closed):

- record actions/outcomes in the contact attempts and consent section on the referral, enter comments using the log a call function in the referral activity timeline, update the referral status from contact attempt to closed, and use the 'incorrect referral' option in your dropdown closure reason list.
- and you still have concerns for a client's safety and are unsure of next steps, discuss with your Manager and/or DVO, before closing the CRP referral without attempting contact. These cannot be returned as reallocations.

If the referral is not to be deleted (i.e., closed):

- proceed to attempt to contact the client as usual, and record your contact attempts.

f. A total of three (3) attempts at contact should be made within five (5) business days of receiving the referral on your system, and each contact attempt recorded before the referral processes to case coordination or is closed on the system.
g. Record initial and subsequent contact attempts on separate days, using **contact attempt 1**, **contact attempt 2** and **contact attempt 3** dates and modes on the referral under contact attempts and consent, and record contact attempt comments using the log a call function in the referral activity timeline of the referral. You should only record brief comments about your contact attempt or contact with the client in the activity timeline as this information is visible to all service areas i.e., time of the call, outcome of the call (e.g., left a voicemail, phone disconnected, male answered).
h. More than three (3) contact attempts may be made, however, WDVCAP Unit considers three (3) attempts on different days/times as best practice. For example, you make the 1st attempt at 10:30 am on the day you receive the referral (within 1 business day), you try again at 3:30 pm on the same day. The contact attempt made at 3:30 pm should not be recorded as the **contact attempt 2,** rather, it should be recorded by logging a call in the activity field, noting a follow-up contact attempt on the same day. Please note, only one additional attempt can be recorded on the referral record, e.g., an SMS sent after the 3rd attempt if safe to do so. However, you can make as many additional contact attempts as needed, recording these as tasks in the activity timeline.
i. If a client calls back the WDVCAS on the same day that you have already recorded a contact attempt on the referral under contact attempts and consent, this is to be recorded in the log a call function in the referral activity timeline of the referral noting ‘client called back’.
j. When contact is made and consent provided, the referral status should be updated to active cases. Create a new case coordination to record the information and support you provide to the client (eg., DVSAT, information and support).

Notes

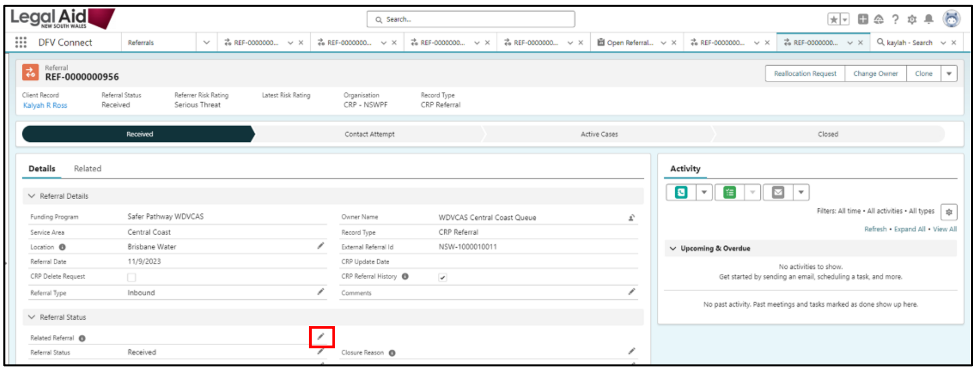
Note	Description
Privacy	• You can advise clients their information is stored by Legal Aid NSW, if they ask how their personal information is stored.
Status	• Referral must be updated to **contact attempt** status before you can record your contact attempt date and mod on the referral
Logging a call	• You should only enter brief comments about your contact attempt or contact with the client in this task as this information is visible to all service areas. • You can record detailed notes/service events after recording consent in your case coordination case (cases are only visible within your service area).

Process steps

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

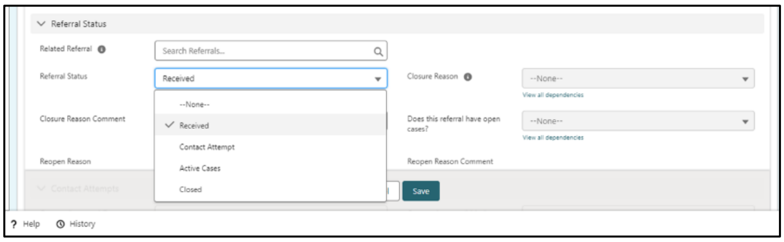
To record contact attempts, update the referral status **Contact Attempt**.

Click on the edit icon (pencil) in the Referral Status field.



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

Select **Contact Attempt** from the picklist and **Save**.

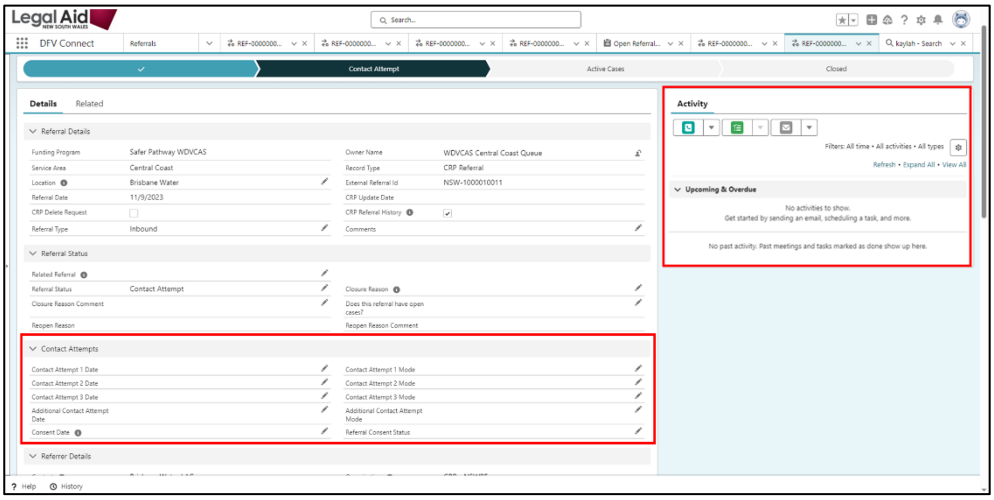


The referral status will change to **Contact Attempt** (indicated by top bar and referral status field update).

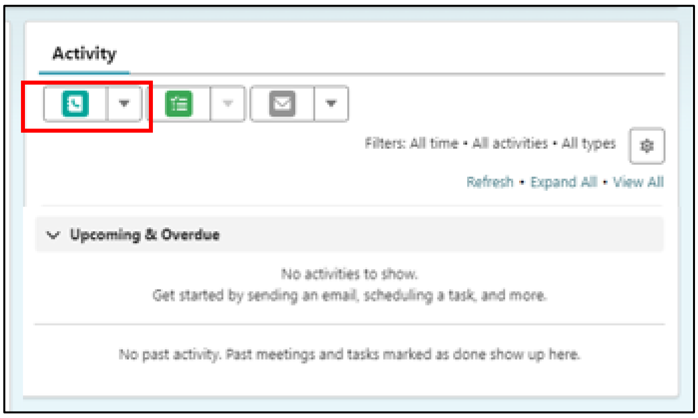
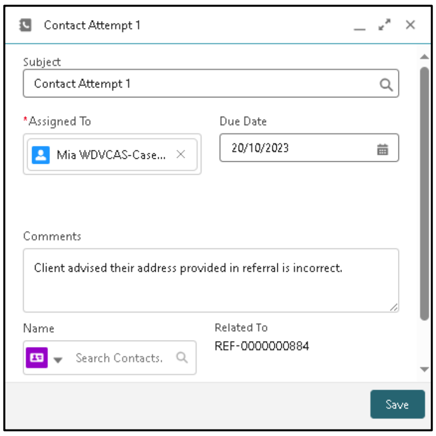
</td></tr>
<tr><td>3.</td><td>

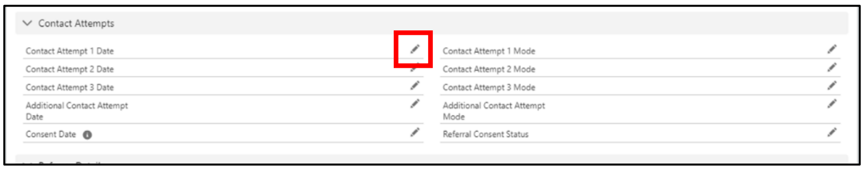
Recording contact attempts in DFV Connect, involves two steps, on both the left and righthand side of the screen:

- Activity timeline – log a call (record notes about contact made)
- Contact attempt section in the referral details (record date and mode of contact made)



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

Step	Description
4.	To document you contacted client, click on the log a call function (**Phone** thumbnail)I in the **Activity** timeline. 
5.	The subject line will automatically default with 'Contact Attempt' - enter the number of your contact attempt so it is clearly marked. In the comments, include short description of your contact attempt. Select **Save**. **Note**: Only record brief comments about your contact attempt or contact with the client in the Activity timeline as all information recorded on the referral is visible to all service areas within your funding program. Examples include left a voicemail, phone disconnected etc.) 
6.	The Activity feed will display a record that you have contacted client, however the contact attempt must also be recorded on the referral details. You must also record the date and mode on the lefthand side of the screen in the **Contact Attempts** section and record the **Date** and **Mode.** To record this, click on the thumbnail icon.

Step	Description
	NOTE: When selecting the Contact Attempt Date (1, 2 or 3) you will only be able to select **<u>today's date</u>** 
7.	Follow the same process to record any other contact attempts.

Additional contact attempts

Only one additional attempt can be recorded on the referral record. However, you can make as many additional contact attempts as needed and record these as tasks in the activity timeline.

Send an SMS

If the client cannot be contacted after three attempts within a reasonable period and there is a mobile number provided, an SMS can be sent, if safe to do so.

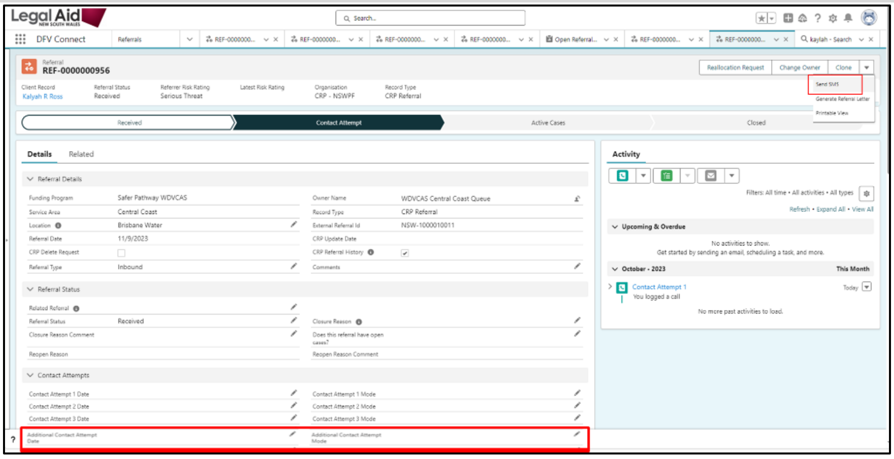
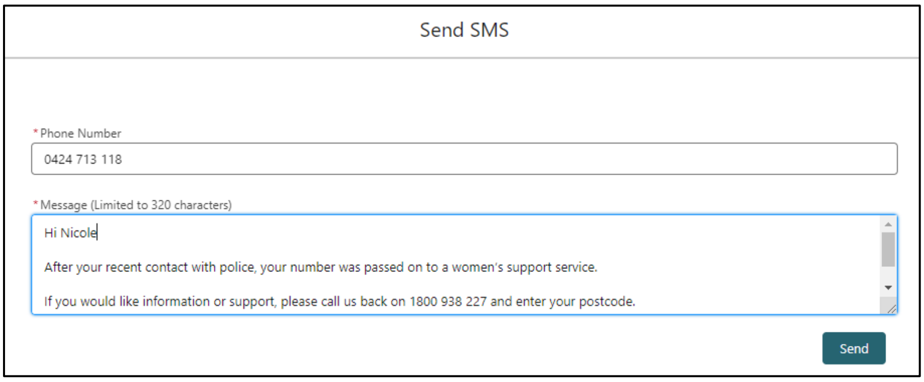
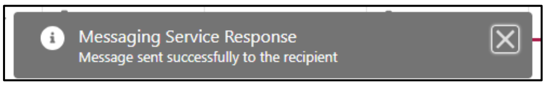
Sending an SMS between call attempts to the client, may help them to identify who has been attempting contact (particularly where your phone number is private/no ID).

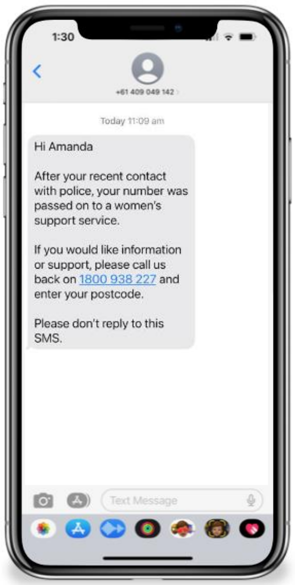
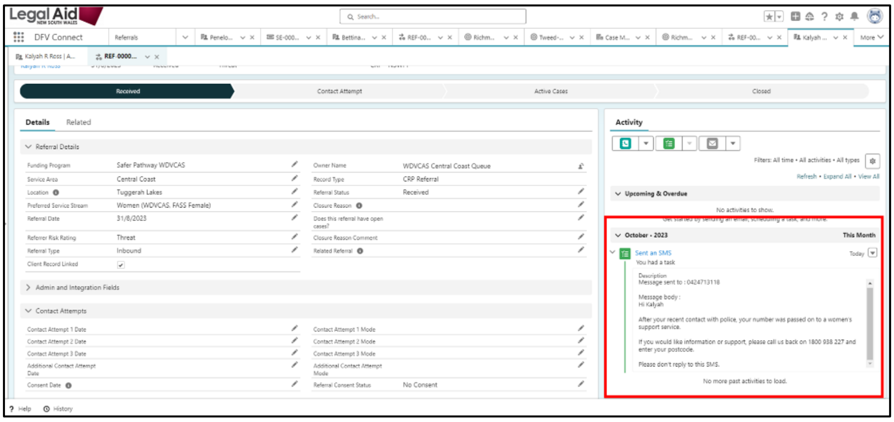
Practice rules

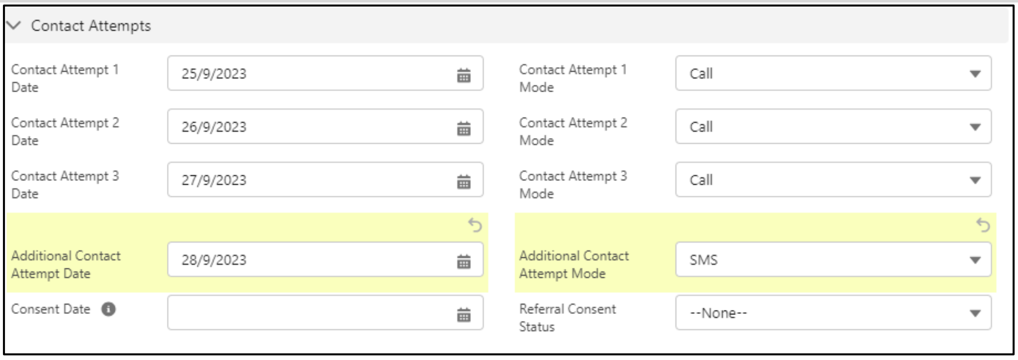
- SMS contact should not be made as the 1st, 2nd, or 3rd attempt to contact the client. SMS contact is regarded as an additional contact attempt, unless the referral specifically advises contact by SMS only.
- An SMS can only be sent from the referral and for making contact attempts. Confidential information should not be sent in an SMS as it is visible to all service areas.
- If you need to send an SMS for a client regarding referral information, confidential conversations, court information etc., you will need to send the SMS from a work mobile.

Process steps

Step	Description
1.	If the client cannot be contacted after three attempts within a reasonable period and there is a mobile number provided, an SMS can be sent, if safe to do so. Sending an SMS between call attempts to the client, may help them to identify who has been attempting contact (particularly where your phone number is private/no ID). To send an SMS, click on the drop-down arrow in the top righthand corner of the referral record. Select **Send SMS**.

Step	Description
	 **Note:** You cannot send an SMS from other areas of DFV Connect (e.g. Case).
2.	The *Send SMS* screen will display. The client's mobile number is pre-populated from the *referral* record but is editable. **Please ensure you check this number from the person account and update if required.** The message content is pre-populated, however you can edit this message where required. For example, if the referral did not come from the NSW Police, you should update the sentence "After your recent contact with police, your number was passed on to a women's support service". Click **Send.**  **Note:** Please ensure that you update the call back number to suit your office where required.
3.	A grey pop-up window will appear indicating that the message was successfully sent. 
4.	The victim will receive a SMS.

Step	Description
	
5.	The SMS sent will be recorded and saved in the referral activity timeline. 
	Do not send any subsequent SMSs unless you have confirmed the mobile number with the victim and obtained consent.
6.	You should also record the Additional Contact Attempt on the referral screen. Click on the pencil icon in the Contact Attempts section in the referral to edit. Select the **Additional Contact Attempt Date** and Select **Additional Contact Attempt Mode** as SMS. Click **Save**.

Step	Description
	

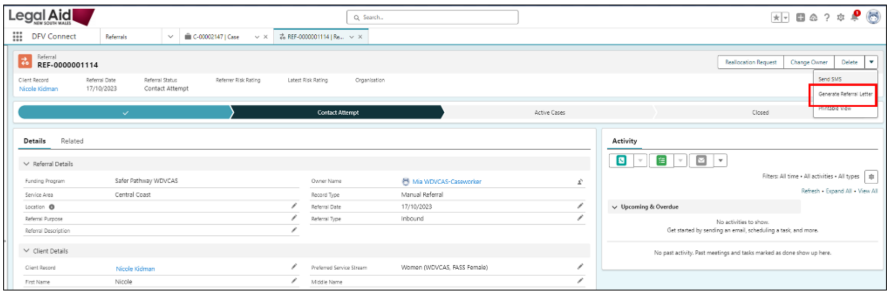
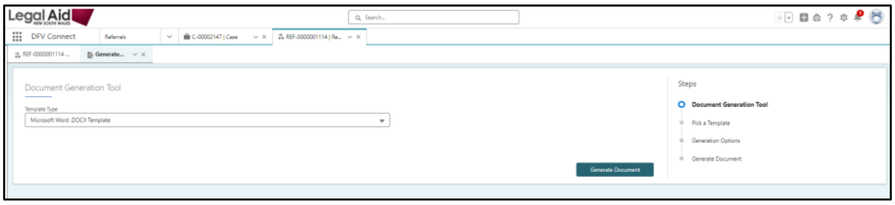
Generate Letter

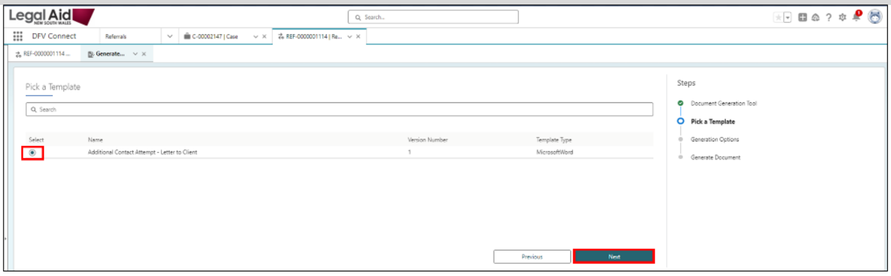
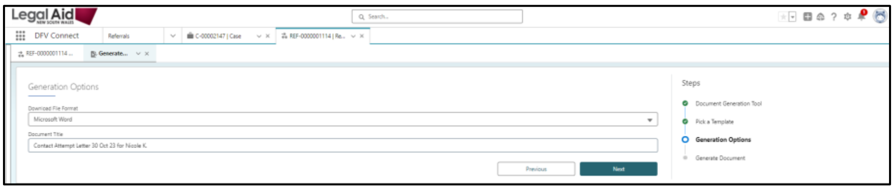
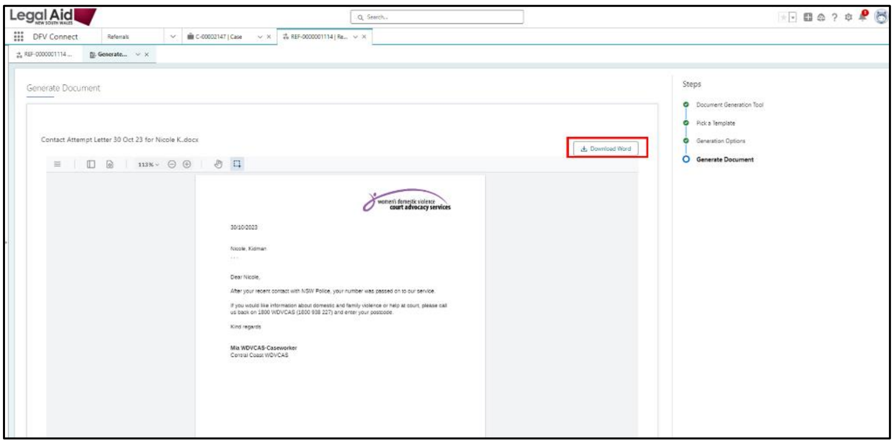
If the client cannot be contacted after three attempts within a reasonable period, you can generate a letter to the clients known address. Do not mail a letter to a client unless you are confident it is safe to do so, e.g., the POI lives at a confirmed different address, the DVO has advised the victims address is safe to receive mail etc.

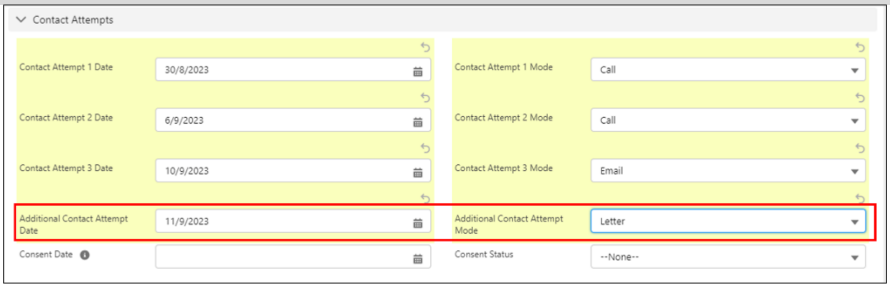
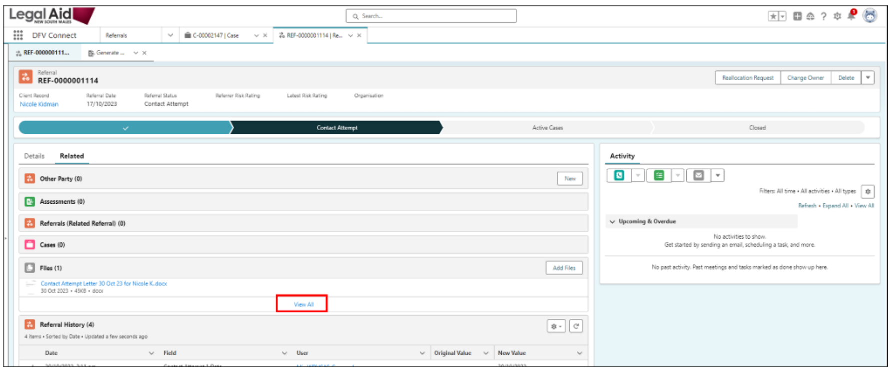
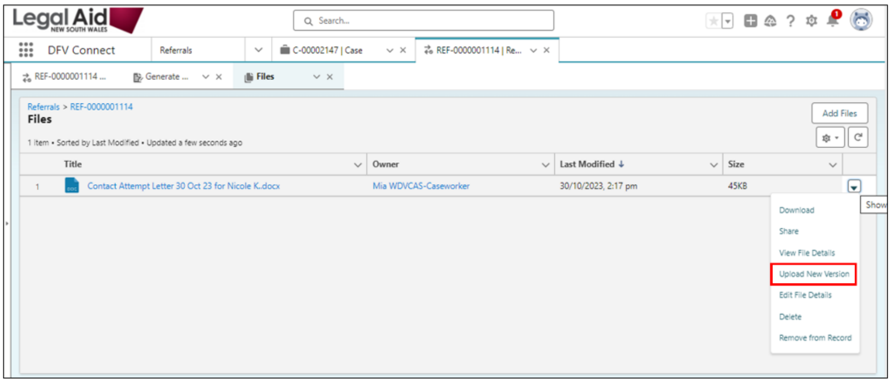
Practice rules

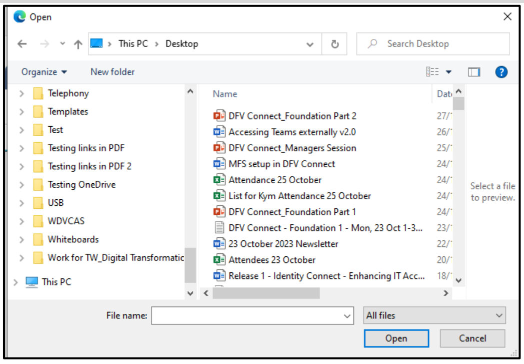
a. Sending a letter to a client should not be made as the 1st, 2nd, or 3rd attempt to contact; they are additional contact attempts, unless the referral specifically advises contact by letter only and advised by DVO it is safe to do so.

Process steps

Step	Description
1.	From the Referral, first check that the client has an address recorded. If not, click the pencil icon to go into edit mode and in the Client Details section, enter a Residential Street, Residential Suburb, Residential State and Residential Postcode.
2.	Next, on the top menu, click on the drop-down arrow then select **Generate Referral Letter** 
3.	The *Document Generation Tool* screen will be displayed. Select the Template Type **Microsoft Word.DOCX Template** and then select the **Generate Document** button. 
4.	The *Pick a Template* screen is displayed. Select **Additional Contact Attempt – Letter to Client** and then click on the **Next** button.

Step	Description
	
5.	The *Generation Options* screen is displayed. Enter a Document Title and select the **Next** button. 
6.	The *Additional Contact Attempt Template* is displayed. Click on **Download Word** if you need to make changes to the text of the document**.** 
7.	The Word document will download to your computer. Open the file in Word, edit to suit your requirement, temporary save on your computer, print the letter and post it in the mail.
8.	Next, you need to record that you have sent the letter. From the **Referral**, click on a **pencil** to enter edit mode. In the Contact Attempts area enter an **Additional Contact Attempt Date** and select **Additional Contact Attempt Mode** as **Letter.** Click on the **Save** button.

Step	Description
	
9.	On the **Referral**, **Related Tab**, you will notice that the generated word document is displayed in the **Files** section. If you edited the letter, you can upload the new version on the letter. Click on the **View All** link under the **Files** heading. 
10.	Click on the drop-down icon next to the document and select the **Upload new version** option. 
11.	Find the edited version of the Word document and upload it to the Files areas to keep a record of the letter sent to the client.

Step	Description
	

Reallocating referrals (reallocation request)

In instances where the referral has been incorrectly allocated to your service area, you can reallocate the referral by using the **reallocation request** function to send the referral to WDVCAP to action accordingly.

If you have made contact and provided with new information, it is important that you record this as part of your (in particular, logging the call) so the reallocated service area will have this information. When the referral has been reallocated to the correct service area (where needed), the referral's status will be set to receive and all contact attempt information *on the referral* will be removed. However, they will be able to view any contact attempts made prior to reallocating in the referral's activity timeline, if the call was correctly recorded.

Reallocation request reasons

Reason	Description
Interstate referral	Victim lives in another state or territory
Incorrect or new address	Victim address was incorrectly listed on referral or victim has now moved to another Service Area
Shared postcode	Victim address is in a postcode that is shared between two Service Locations, and needs to be reallocated to the other Service Location
Incorrect gender	Victim gender was incorrectly listed on referral or victim does not identify with gender listed on referral. Referral needs to be returned to CRP for action by a LSS by WDVCAP
Conflict of interest	Service Area has a conflict of interest with the victim and cannot assist them (i.e., victim or POI is a member of staff)

Practice rules

- Referrals should be linked to a **client person account** before requesting reallocation.
- WDVCASs should only return a referral if the client affected by domestic and family violence lives in another area, has been incorrectly referred to your WDVCAS, or there is

a conflict of interest for your WDVCAS.

- Referrals can be reallocated at any workflow stage.
- Referrals will not be returned to NSW police. If you require more information regarding the referral prior to reallocating it, you must contact your local DVO and ask for more information, specifying the event number.
- You must record all contact attempts in the log a call function (where made), select a reallocation reason and provide information in the reallocation request comment field before reallocating a referral.
- CRP referrals where the POI is under 10 years old and/or the victim is under 16 years old cannot be reallocated. You should mark this information on the referral 'victim aged under 16' and see referral closure reasons for steps.

Notes

- You should review the process steps for each reallocation request reason as processes may differ depending on your request reallocation reason.
- A reminder that referrals should be linked to a **client person account** before requesting reallocation. Client person account information must be updated before requesting reallocation and information must be recorded in the **request reallocation comment.**

Incorrect or new address and interstate referrals

If a client discloses new information, such as a new address or interstate referrals, please ensure the suburb and postcode information is updated on the **Person Account** before requesting a reallocation.

If you receive this information, you should:

- Record the conversation and the new information provided in the referral 'log a call' activity timeline.
- Update the client's person account with the new information
- Provide the updated details in the request reallocation comment (including reason for reallocation and the correct address)

Practice rules

- Where you receive information or identify the address listed is incorrect, the client resides at a different location, including interstate addresses, you must:
  1. record this information using the log a call function in the referral activity timeline
  2. update the new details in the client person account
  3. process the reallocation request by selecting the reallocation request reason and provide a comment in the reallocation request comment box
- Any conversation (i.e., with a client or other service) where new information is provided must be noted in the log a call activity timeline so there is a record of where this information came from.

Reallocation request comment example

Reallocation request as client does not live at address provided on referral. Client's correct address is: <insert full address>. Confirm the client's person account has been updated with these new details.

Shared postcode

WDVCAS areas may have postcodes that are 'shared' with another WDVCAS. This is because some NSW Police commands have boundaries in the same postcode but for different suburbs or towns. Sometimes even a suburb/town is split. The WDVCASs that are affected have a shared postcode list, so they know which suburbs/towns they accept and which suburbs/towns they return for reallocation.

If you determine that the referral belongs to another WDVCAS even though the postcode and attending police command indicates it is yours, you must provide the relevant information in the reason for reallocation request. If you do not, it will be sent back to you.

If you identify there is a shared postcode, you should:

- record this information in the 'task' function in the activity timeline
- process the reallocation request by selecting the reallocation request reason and provide a comment in the reallocation request comment box

Practice rules

- Use the shared postcode list to confirm a suburb and postcode is shared with another WDVCAS.
- If you confirm the suburb or postcode is shared with another WDVCAS, you should:
  1. Record this information in the task function in the referral activity timeline (eg., checked and confirmed the provided postcode belongs to another WDVCAS).
  2. process the reallocation request by selecting the reallocation request reason and provide a comment in the reallocation request comment box (eg., 'Shared postcode with [Service Area]'.

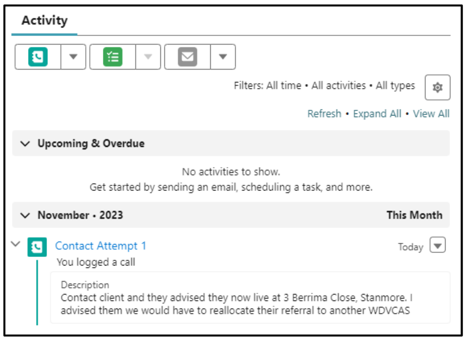
Notes

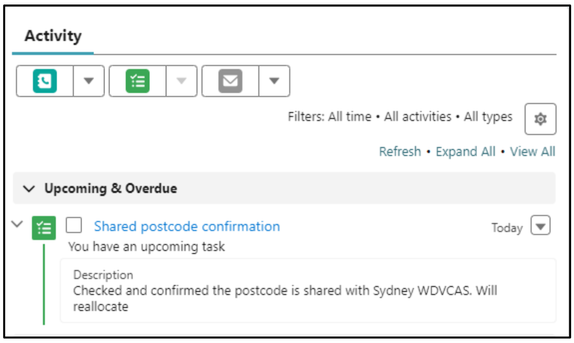
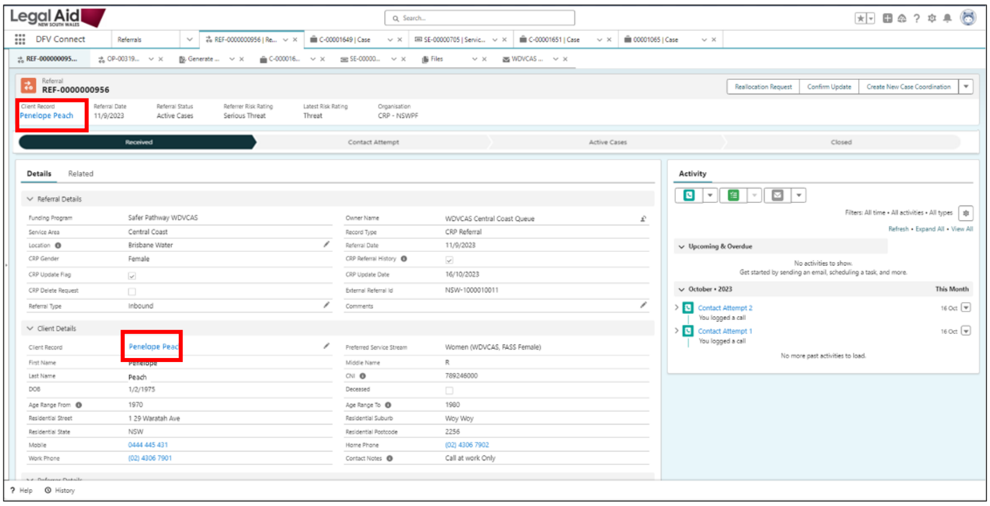
Note	Description
Shared postcode list	WDVCAP allocate referrals with shared postcodes strictly according to the shared postcode list.
New postcode	Please contact WDVCAP if you think a postcode provided is new or are unsure.

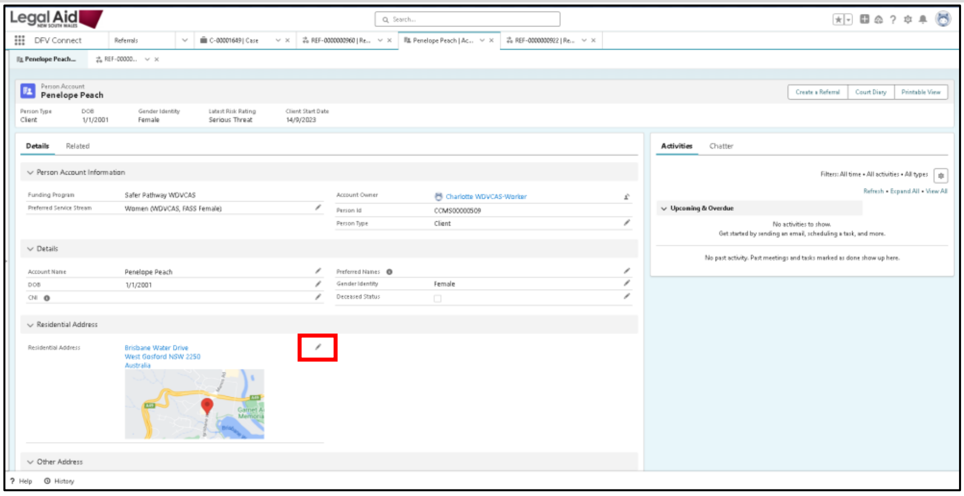
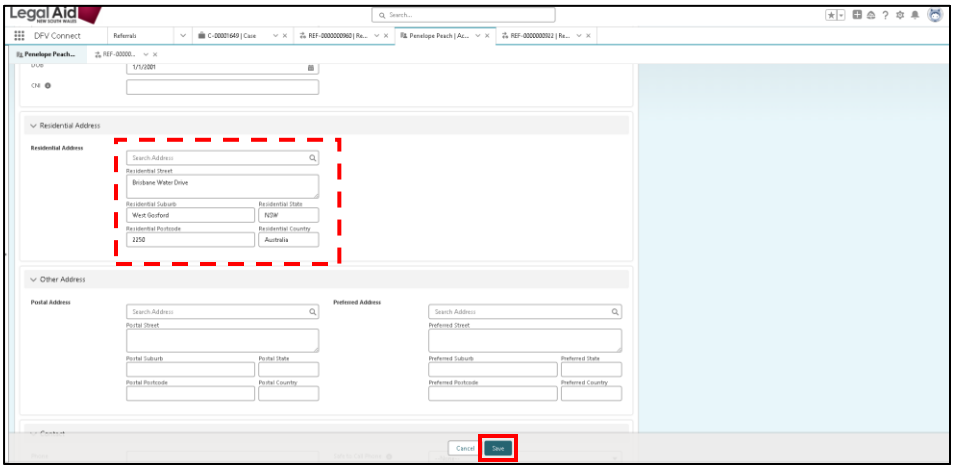
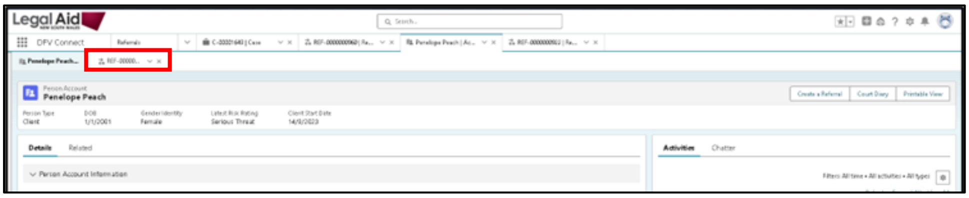
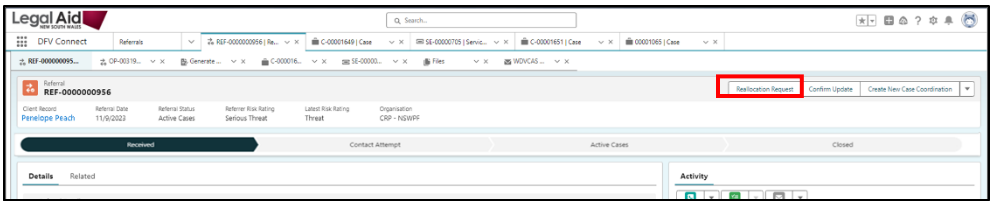
Reallocation request comment example

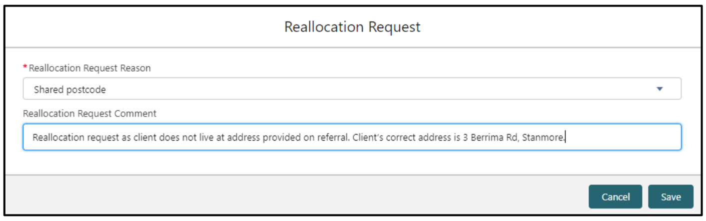
Shared postcode.

Process steps

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>Record the conversation about new information received using the log a call function or record the confirmation the referral belongs to a shared postcode using the task function in the activity timeline (mark as complete once reallocated).



</td></tr>
<tr><td>2.</td><td><table>
<tr><td>Incorrect or new address / interstate referral</td><td>Go to step 3</td></tr>
<tr><td>Shared postcode</td><td>Go to step 6</td></tr>
</table></td></tr>
<tr><td>3.</td><td></td></tr>
<tr><td>4.</td><td>Person record will be displayed. From the Details tab, click the pencil next to the details you want to edit.</td></tr>
</table>

Step	Description
	
5.	Edit the details to update their address, then click **Save.** 
6.	Go back to the referral (you can also access referral via the **Related** tab on the Person record). 
7.	Select the **Reallocation Request** button. 

Step	Description
8.	The *Reallocation Request* pop-up screen will be displayed. Select the **Reallocation Request Reason** and enter **Reallocation Reason Comment.** Select the **Save** button. 
	WDVCAP will return your reallocation request if they cannot determine the correct service area to reallocate it to, e.g., if you request a reallocation with reason "Client has relocated to the Sydney area" and have not updated the address on the client person account, WDVCAP will be unable to reallocate, and the referral will be returned to you.

Wrong gender

All incorrect genders must be reallocated to WDVCAP as soon as possible so WDVCAP can reallocate these to the male cohort. Important fields regarding wrong gender reallocation are:

- **Preferred service stream**: This field is mapped to the CRP gender field and controls the visibility of female and male referrals. You will not be able to edit this field on the referral, but you should update this on the client account before reallocating.
- **Gender identity**: DFV Connect has a more inclusive list to represent gender identity in the client account. This field is not included on a referral so should be updated on the client account before reallocating.

Refer to the WDVCAS tip-sheet on working with transgender and non-binary clients for more information.

Practice rules

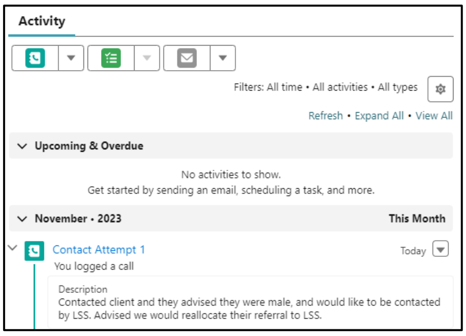
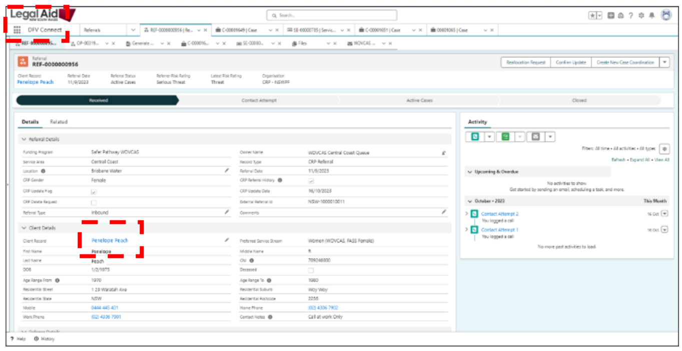
- If you contact a person referred to you and they identify as nonbinary or other, you should ask them what type of service they would prefer to work with. You can update this information in the 'gender identity' field on the client person account.
- Where you receive information or identify the client should be referred to LSS, you must:
  - record this information using the log a call function in the referral activity timeline (eg., client advised they are male and would like to be contacted by LSS, I advised them we would reallocate their referral)
  - update the new details in the client person account (eg., preferred service stream – male and gender identity – male)
  - process the reallocation request by selecting the reallocation request reason and provide a comment in the reallocation request comment box

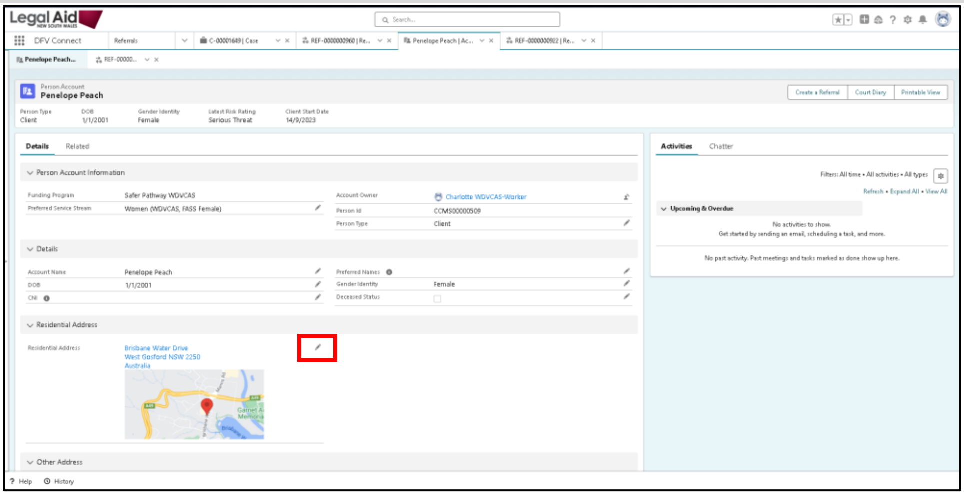
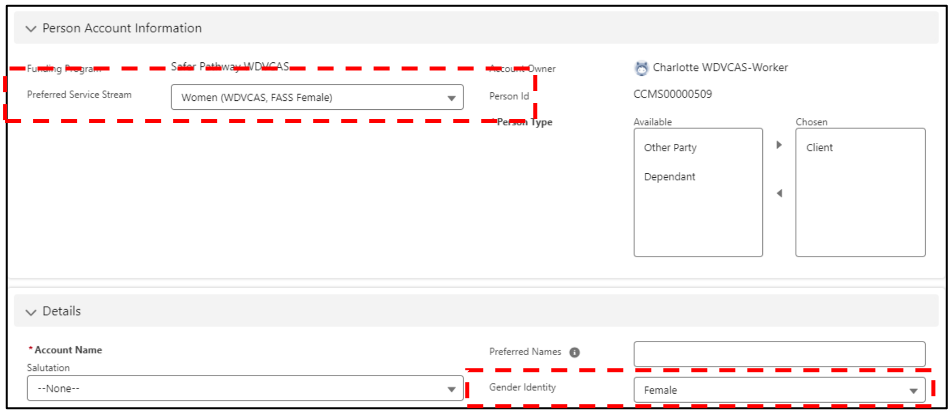
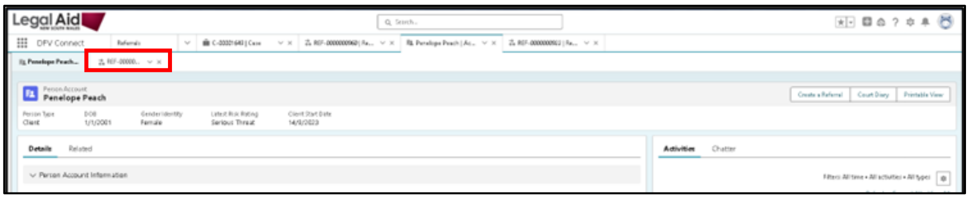
- Any conversation (i.e., with a client or other service) where new information is provided must be noted in the log a call activity timeline so there is a record of where this information came from.

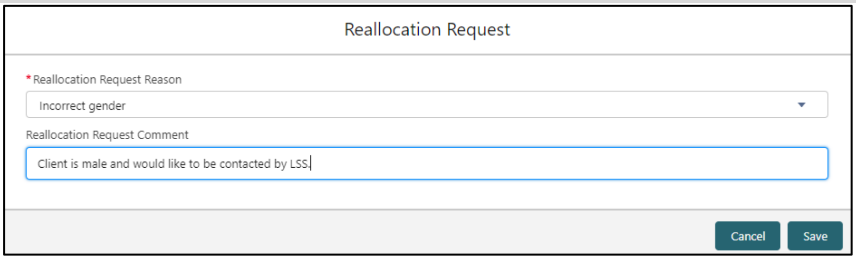
Request reallocation comment example

Reallocated for incorrect gender. The client's person account has been updated.

Process steps

Step	Description
1.	Record the contact attempt in the log a call function on the activity timeline. 
2.	From the referral record, go to the client's person account to update their information. 
3.	Person record will be displayed. From the Details tab, click the pencil next to the details you want to edit.

Step	Description
	
4.	Update the **gender identity** and **preferred service stream** fields. 
5.	Go back to the referral (you can also access referral via the Related tab on the Person record). 
6.	From the Referral, click on Reallocation request in the top righthand corner. 
7.	The Reallocation Request screen will be displayed. Select Referral Request Reason – Incorrect gender and enter a Reallocation Request Comment (e.g., this client identifies as a male and would prefer to be supported by the LSS.) Select **Save**.

Step	Description
	
	WDVCAP will then receive and review the referral. They will then return the referral to the CRP, so that the referral can be re-allocated to the male cohort.

Conflict of Interest

If you identify a conflict of interest with a referral received in your service area (eg., victim or POI is a WDVCAS staff member), speak with your manager to determine whether you should reallocate the referral to WDVCAP who will contact the client to offer support.

Reallocating a referral due to conflict of interest involves:

- Recording the information in the conflict of interest section on the referral
- Processing the reallocation request by selecting the reason and providing a reallocation request comment.

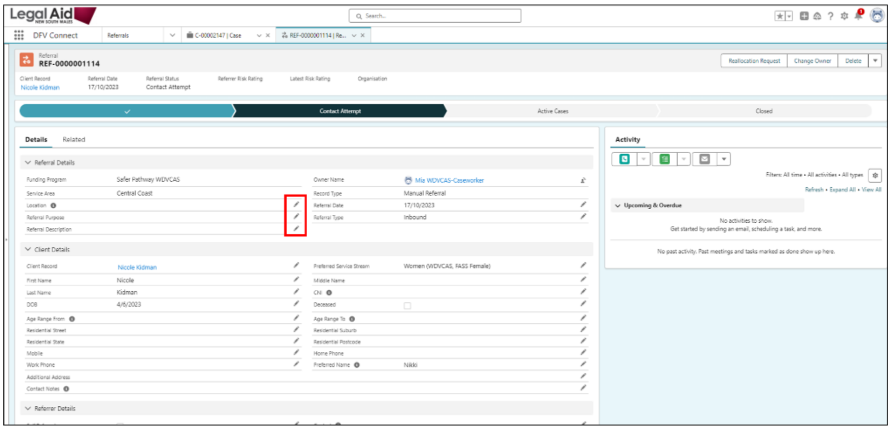
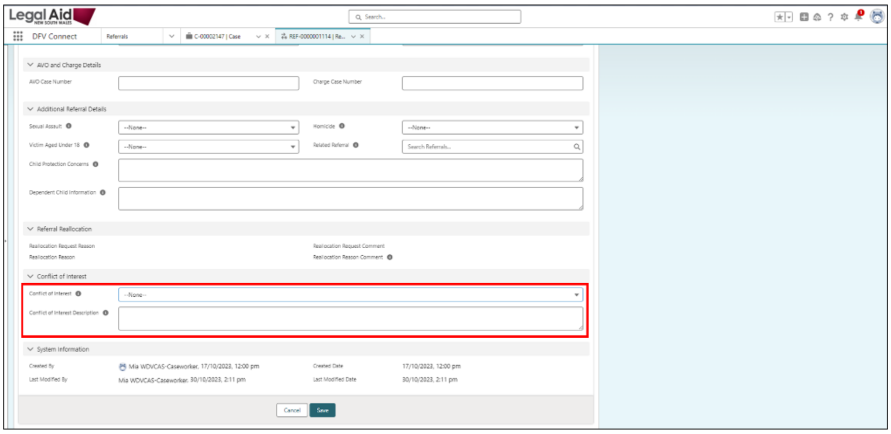
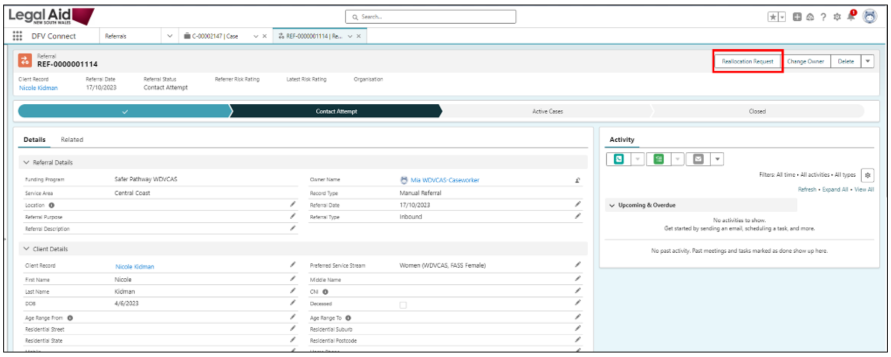
Practice rules

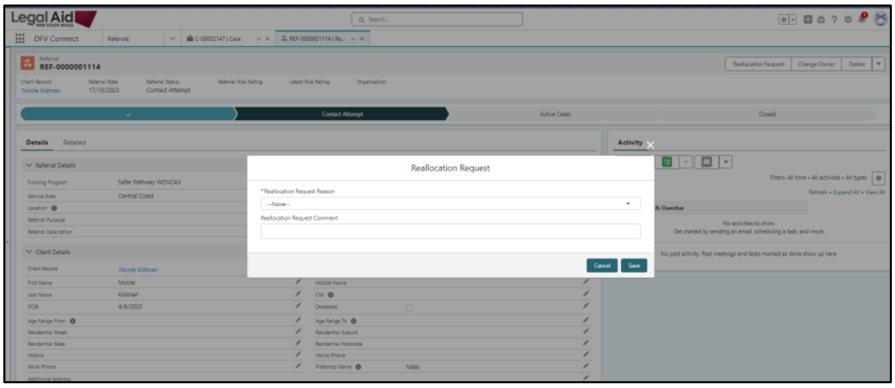
- It is important to notify the WDVCAS Manager immediately if you identify a conflict of interest because you are either listed as the victim or the POI in an incident, or you know the persons involved, e.g., the victim is your sister.
- The WDVCAS manager should assess how the conflict can be managed to ensure safety, confidentiality and privacy are adhered to. WDVCAS Managers can reallocate these referrals to the WDVCAP Unit.
- In cases where the conflict of interest involves the manager, these referrals should be returned to WDVCAP Unit for appropriate service and support to be offered.
- When managing conflicts of interest, it is important to abide by a range of policies and legal frameworks including your service policies, WDVCAP Policy and Procedure Manual and statutory regulations.

Request reallocation comment example

- <Conflict of Interest or COI> identified – Please reallocate to WDVCAP for service.

Process steps

Step	Description
1.	From the referral record, click on a pencil icon to edit. 
2.	In the Conflict of Interest section, select **Conflict of Interest** drop down option – Yes. Then enter a **Conflict of Interest Description** and **Save** the referral. 
3.	Click on the **Reallocation Request** quick-action button in the top righthand corner of the screen. 
4.	The *Reallocation Request* screen will be displayed. Select the **Reallocation Request Reason** as Conflict of Interest.

Step	Description
	Enter a **Reallocation Request Comment** and click **Save.** 

Record Consent Status

When working with clients, workers must seek consent from clients. The consent status must be recorded at the time of making a call after contact has been made or after all call attempts have been completed and consent could not be obtained.

Referrals cannot be closed when there are active cases (see clients and cases for case information).

There are three consent statuses:

Consent status	Description
Consented	Client consents to continuing the conversation
No consent	Client does not consent to continuing the conversation
Consent not obtained	Could not obtain consent at time of call or after contact attempts made

Please note the referral status as there are different processes for each status recorded. For example, for client's who have 'consented', a case coordination case is created, and the referral remains open. In instances where there is no consent (at threat risk rating), the referral is closed – see process steps for more information.

Consented

Where a client has provided consent to explore a referral or has provided implied consent by choosing to continue the conversation, this is deemed a consented referral. Where consent has been obtained and the consent status updated, this allows for a case coordination case to be created in DFV Connect. Once a case coordination case is created the DVSAT or assessment and further support functions can be accessed.

When consent is obtained and the referral updated, you should at minimum:

1. Create a case coordination case

2. Complete the DVSAT
3. Record your conversation in an Information and Support Service Event

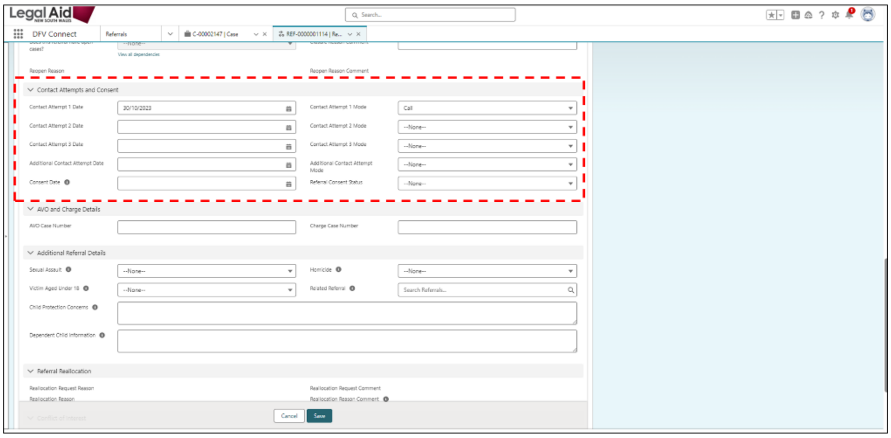
Notes

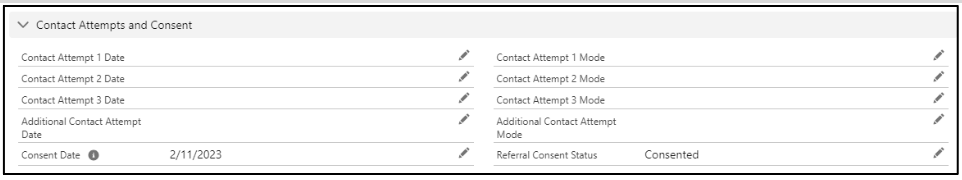
- Consent is not required to create a SAM case
- The referral status will automatically be updated when there is an **active case** created from the referral (this includes where consent has not been recorded and a SAM case has been created).

Practice rules

- When a client has agreed to engage with WDVCAS, the worker must update the consent date and change referral consent status to 'Consented.' These fields are in the 'Contact Attempts' section of the referral.

Process steps

Step	Description
1.	Before recording consent, ensure you have recorded all contact attempts made (i.e., date and mode) in the Contact Attempts and Consent section of the referral and in the log a call activity timeline. 
2.	To record consent, enter the **Consent Date** and the **Consent status** in the **Contact Attempts and Consent** section of the referral. Select **save**. **If the Consents status is Consented,** you will generally have to: • create a case coordination case • record completion of threat assessment using the DVSAT and • any other services provided using relevant service events e.g. information and support, safety planning etc.

Step	Description
	
NOTE	Contact attempt details will be visible to all WDVCASs.

No consent – at threat referral

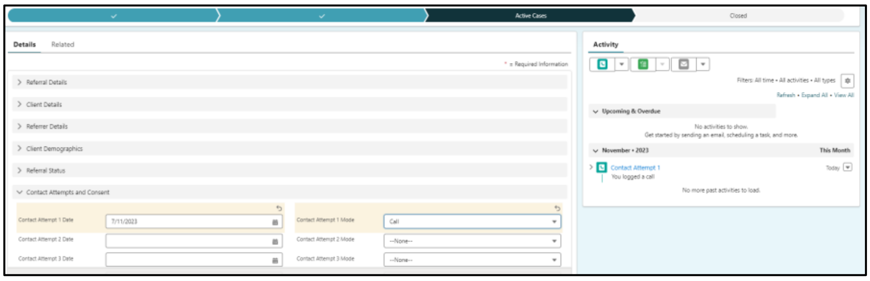
Description

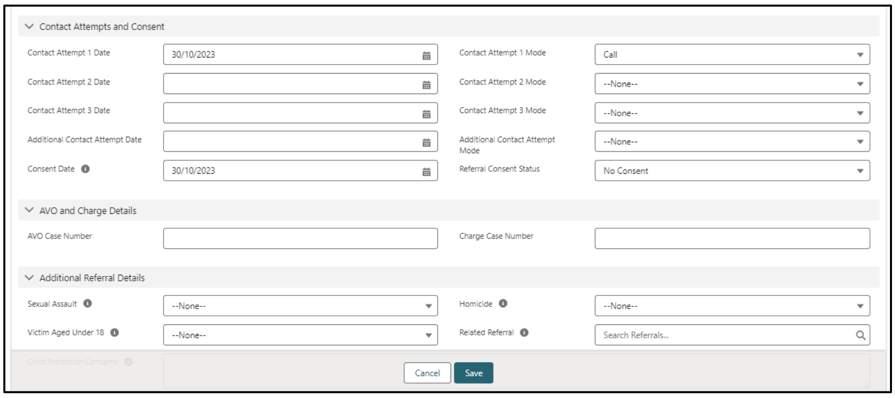
Where a client has not consented after contact has been made, and is an at threat referral, this referral can be closed on the system (this includes manual referrals from external service providers). This only applies to 'at threat' referrals and is not suitable practice for 'at serious threat' referrals.

Practice Rules

- When contact has been established for a referral for a client, the worker must confirm consent to continue the conversation e.g., "are you okay to continue talking to me?"
- If the client chooses to not engage in further conversation or declines to discuss the referral, no consent has been provided. In this case, you should update the consent status and close the referral. You will not be able to create a case coordination case where consent has been recorded as 'no consent'.
- For referrals received not by the CRP (ie., manual or internal referral), it is best practice to let the referring service provider know the client declined to engage, and no further action can be taken on the referral made.

Process steps

Step	Description
1.	Before recording consent status, ensure you have recorded all contact attempts made (i.e., date and mode) in the Contact Attempts and Consent section of the referral and in the log a call activity timeline. 

2.	To record consent, enter the Consent Date and the Consent status in the Contact Attempts and Consent section of the referral. Where you have contacted the client and they have not consented, select the **Consent Date** and “no consent” for the **Consent status.** Select **Save**. 
3.	For referrals with an ‘At Threat’ risk rating, you will then need to close the referral. See close referrals. For referrals with an ‘At Serious Threat’ risk rating, this referral will remain open until the SAM case is closed.

Consent not obtained – at serious threat referral

Description

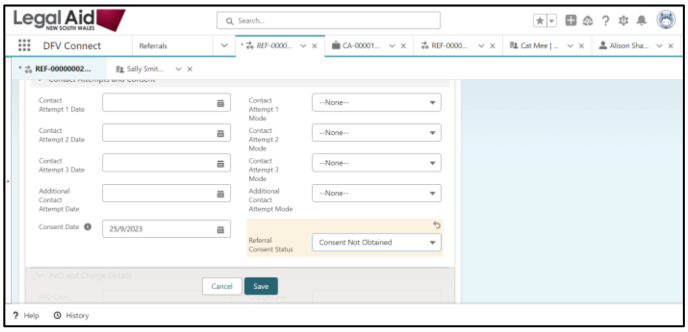
When consent has not been obtained for ‘at serious threat’ referrals (e.g., you cannot contact client, it is not safe to contact the client etc.), you should update the referral consent status to ‘consent not obtained’. The referral should remain open until the SAM case is closed.

The SAM coordinator will be able to create a SAM case where consent has not been provided or obtained and the referral will remain open until the SAM case is closed.

A SAM case is separate from a case coordination case. For ‘at serious threat’ referrals where consent is not obtained, a case coordination case cannot be created. If consent is obtained at a later stage the referral consent status can be updated to create a case coordination case.

Process steps

Step	Description
1.	Before recording consent status, ensure you have recorded all contact attempts made (i.e., date and mode) in the Contact Attempts and Consent section of the referral and in the log a call activity timeline. In this scenario consent is not provided by the client (or there was no attempt as identified on the referral or directed from NSW Police, e.g., the client stated they did not want to discuss the referral details or to work with the service).

2.	Enter the **Consent Date** and select the “Consent not obtained” for the **Consent status.** Select **Save**. 
3.	If the referral is “At Serious Threat” risk rating, after consent status has been updated to “Consent Not Obtained” and you notice a SAM case has been created, please update the referral status to ‘Active Cases’. Please see **Safety Action Meetings** for next process steps.

Link referral to other party account

After you have spoken with your client and confirmed the other party’s details, you can link the referral to the other party person account. This may not happen at initial contact and can be linked at any time. It is best practice to check the other party’s details before linking the referral and/or creating the other party account to ensure they are correct.

Once you link and or create the other party account from a referral, their information will be automatically populated onto the client’s person account as a ‘related account’.

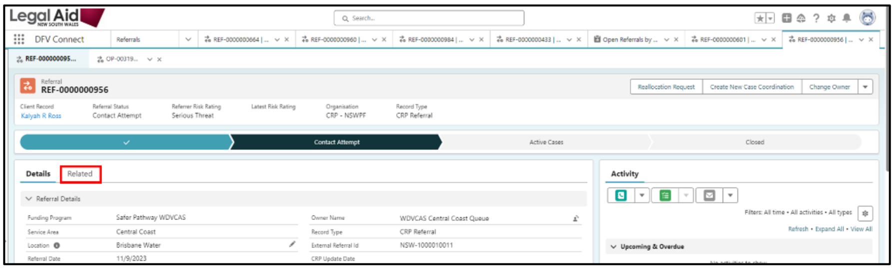
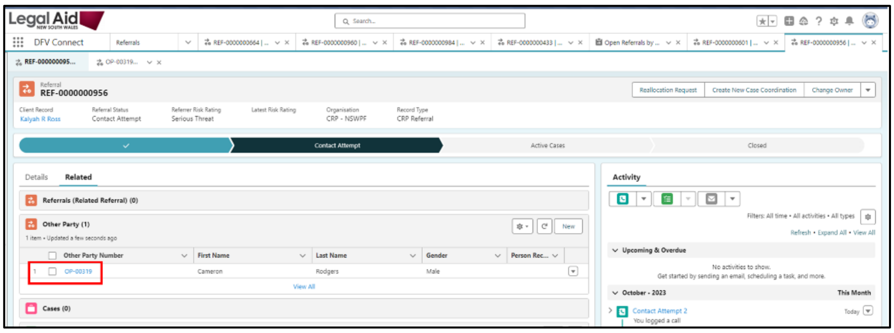
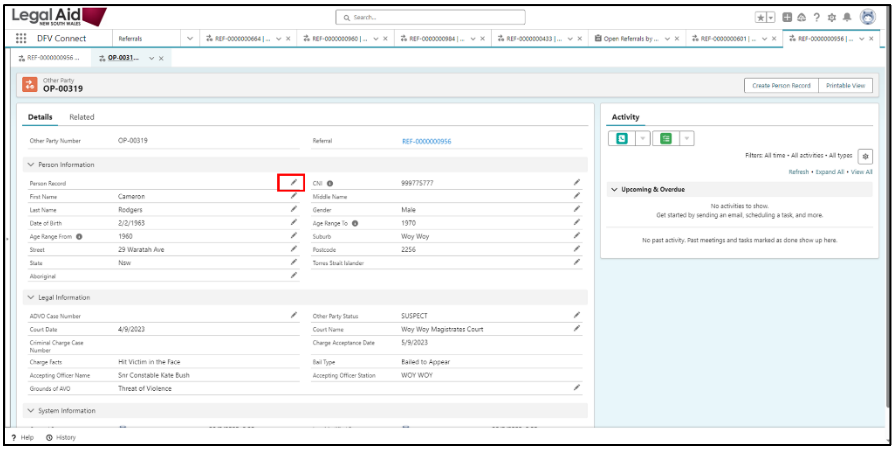
All Other Party person accounts must be created from the referral not the client person account.

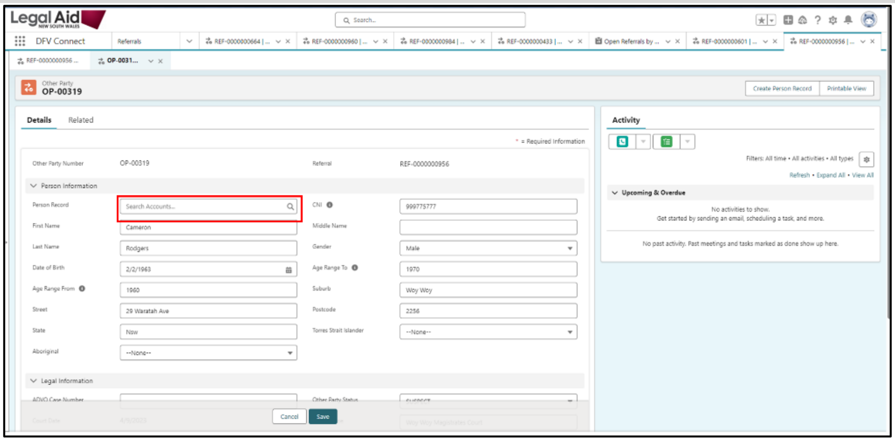
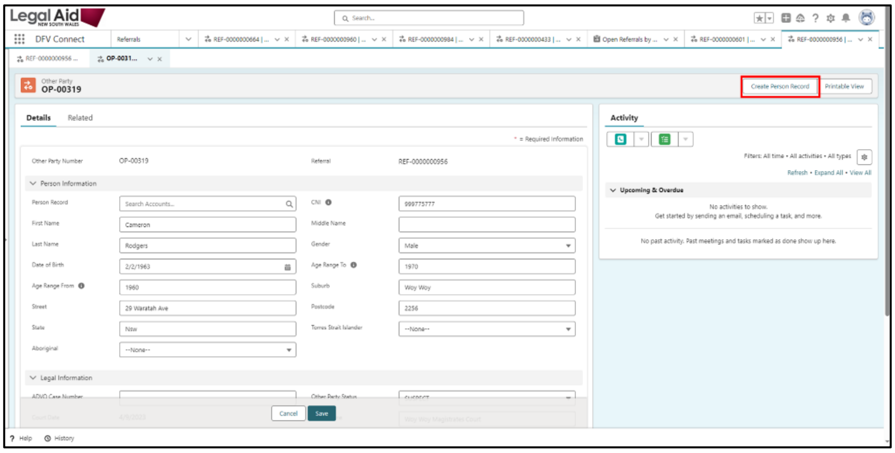
Practice rules

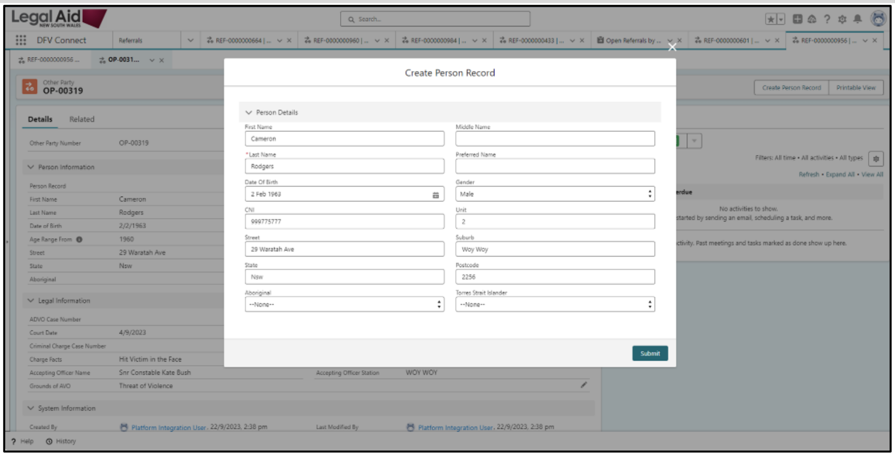
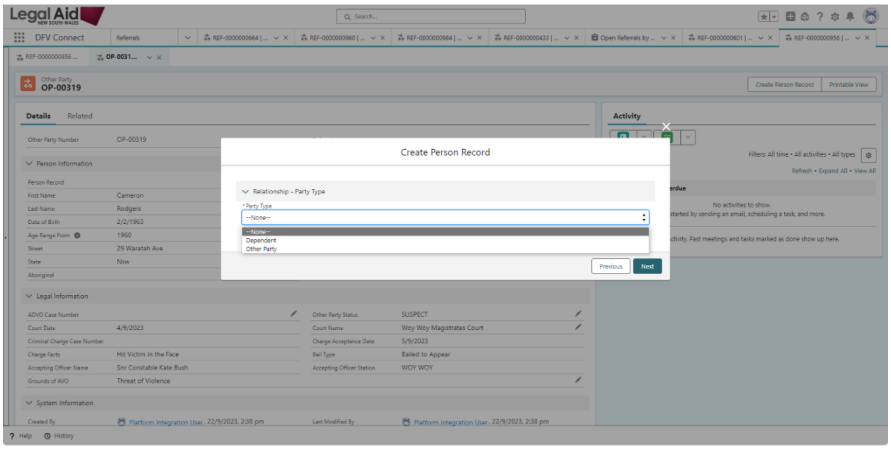
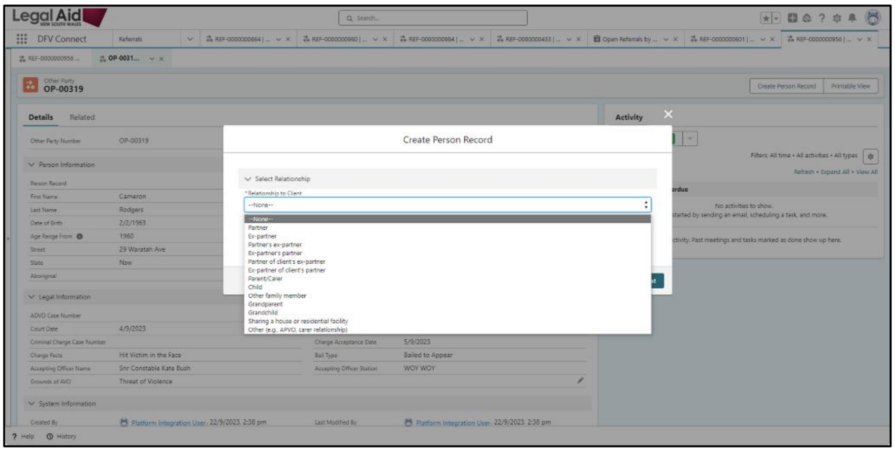
- **Unknown Other Party**
  - Do not create an other party person account where the name is unknown
  - You can update this at a later time if and when there are more details provided
- **Multiple Other Parties**
  - Determine from the DVO or client if there is one main other party. You can add the other party and information to the referral and then link/create the other party person account to the referral

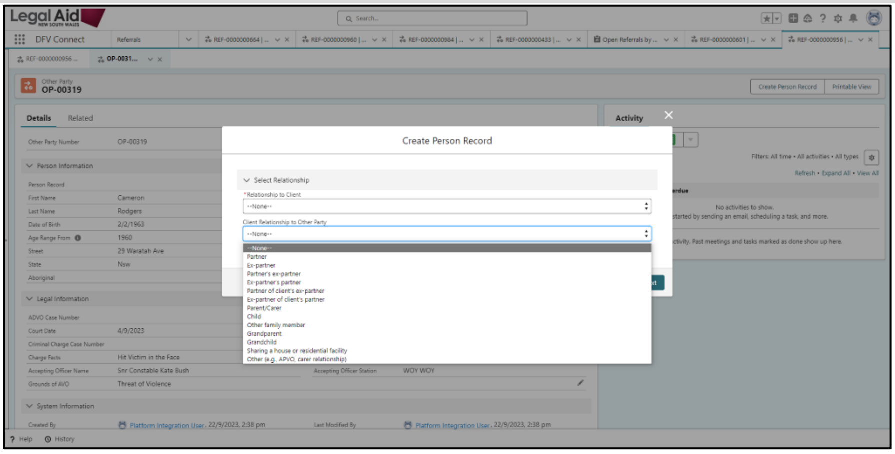
Search, link and create new other party person account

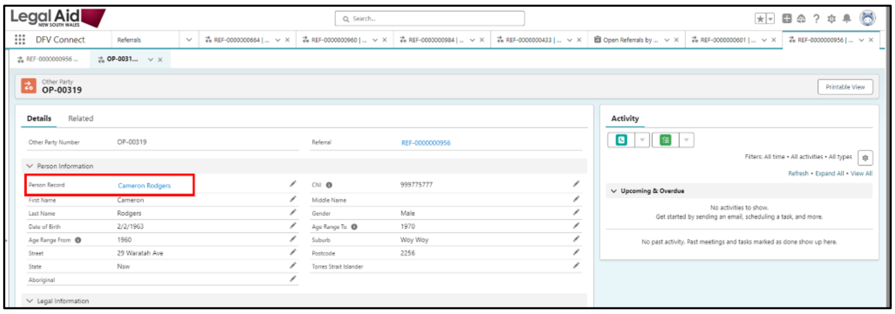
Process steps

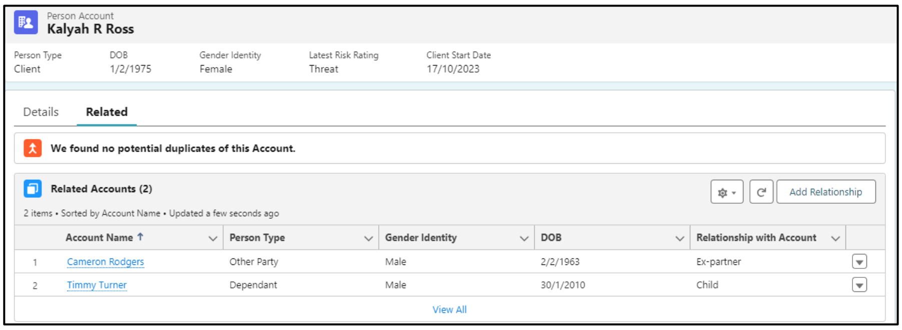
Step	Description
1.	From the referral, select the **Related** tab. 
2.	To view the other party information, select **other party number**. 
3.	The **Other party** details will display in a new tab. Click on any **edit** icon (pencil icon) on the **Person Record** field to search for the other party person account. 
4.	Enter other party's name in the Person record field and click on the magnifying glass icon – Show All Results.

Step	Description
	
5.	Where there is no existing other party person account, close the search window and select the **Create Person Record** button. 
6.	The **Create Person Record** quick-action screen will appear. The other party details will be auto--populated onto the new other party person account. Add additional details and when complete, select **Submit**.

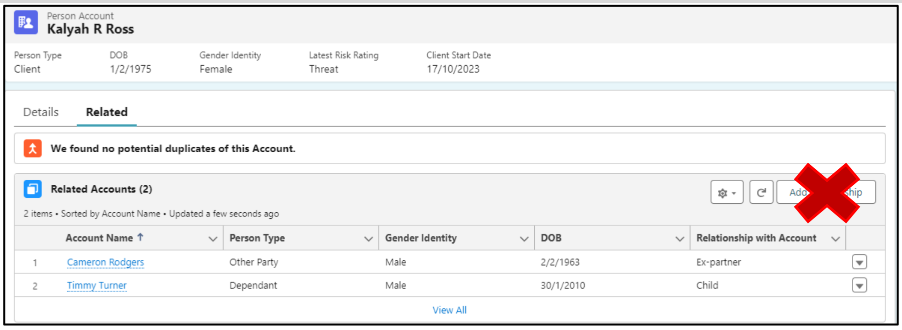
Step	Description
	
7.	Set the relationship type as ‘Other Party’ and **Next**. 
8.	Select the **Relationship to Client.** 
9.	Select **Client relationship to other party**.

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


</td></tr>
<tr><td>10.</td><td>
Once you complete all details, the Other Party Person Account will be created and automatically linked to the referral.
This is indicated by the person record field filled with a link to the other party person account.


</td></tr>
<tr><td>11.</td><td>
The other party person account willl also be automatically linked to the client's person account.


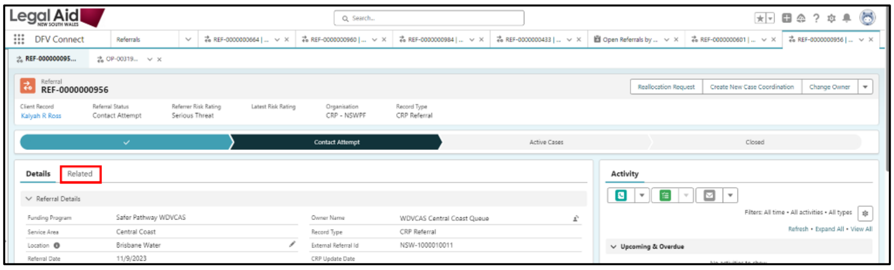
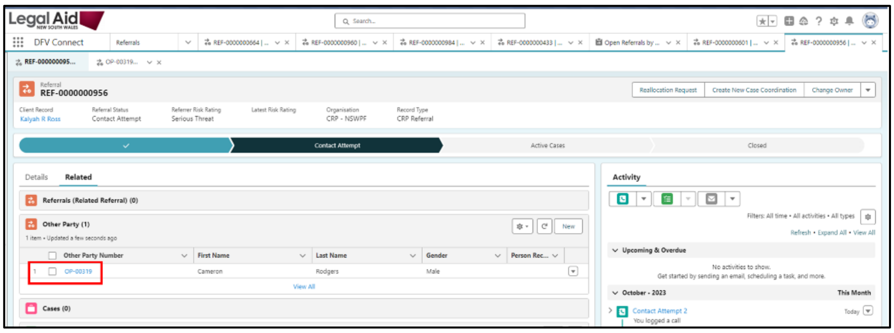
</td></tr>
<tr><td></td><td>All Other Party person accounts must be created from the referral not the client person account.</td></tr>
</table>

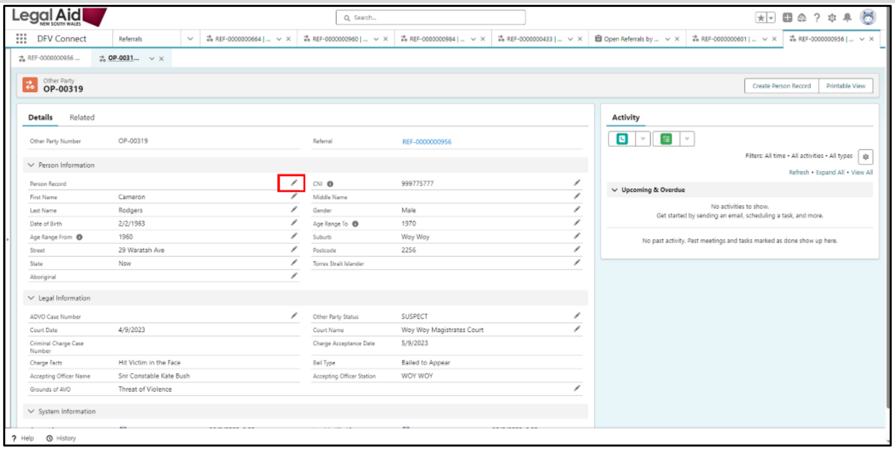
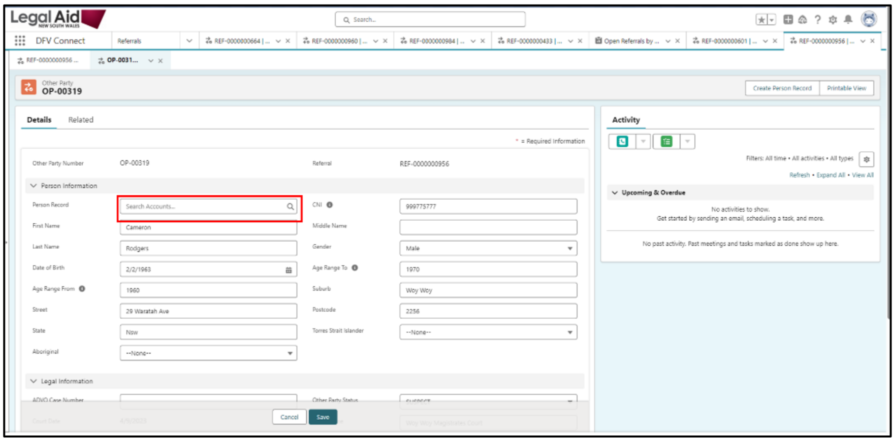
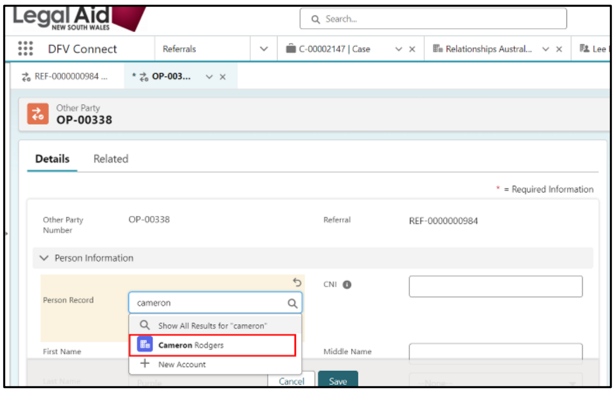
Step	Description
	

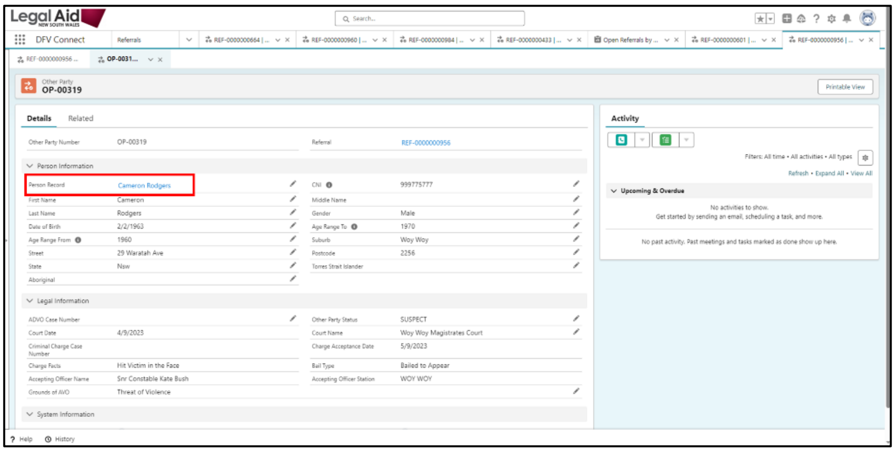
Search and link existing other party person account

The other party person account should not be linked where there is no information provided (see practice rules).

Process steps

Step	Description
1.	From the referral, select the **Related** tab. 
2.	To view the other party information, select **other party number**. 
3.	The **Other party** details will display in a separate tab. Click on the **edit** icon (pencil icon) on the **Person Record**.

Step	Description
	
4.	To search for the other party, enter other party’s name in the Person record field and click on the magnifying glass icon – Show All Results. 
5.	Where an existing other party person account is found, review the existing account to confirm it is the same as what was provided. To link the other party account to the referral, select the existing other party account. Then select **Save**. 

Step	Description
6.	**The Other Party Person Account** is now linked to the other party component of the referral. This is indicated by the blue hyperlink of their name in the person record field. 

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 contact a 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.

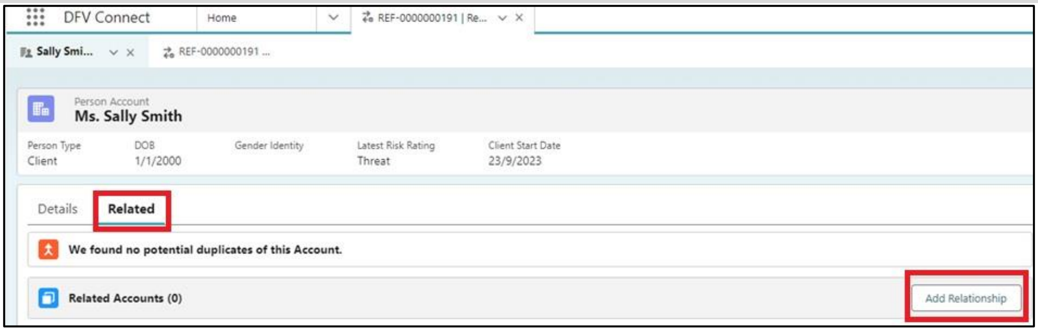
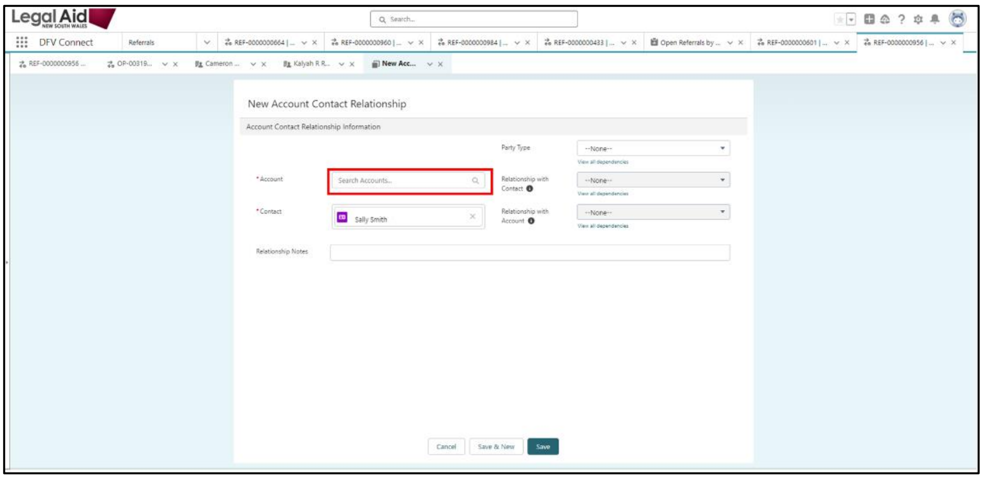
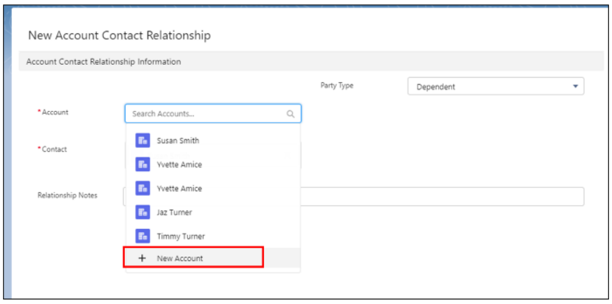
When you add the dependent children account as a relationship on the client's account, their person account will be linked to the client's person account as a 'related account'.

Practice rules

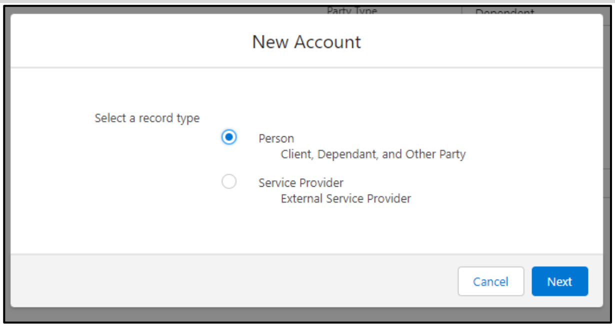
- Dependent Children are:
  - Children aged 16 and under
  - In the client's care (including children, who from time to time, reside with another parent or caregiver)

Process steps

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>

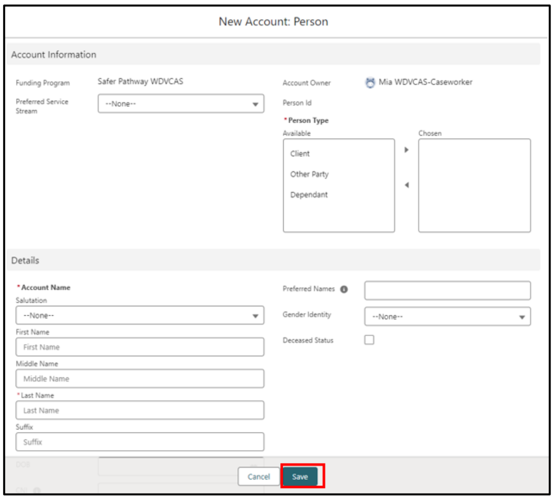


</td></tr>
<tr><td>5.</td><td>

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>

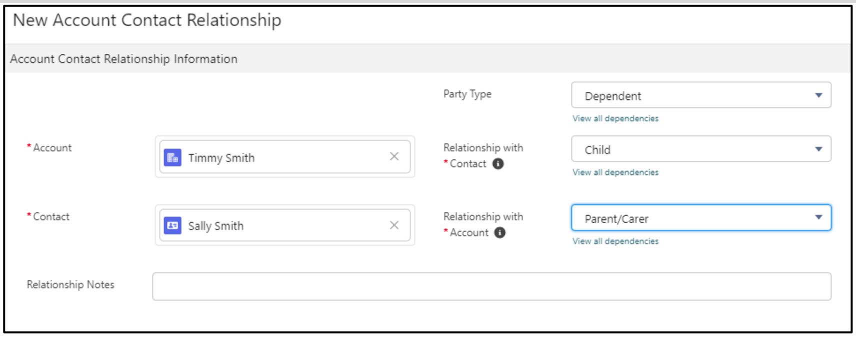
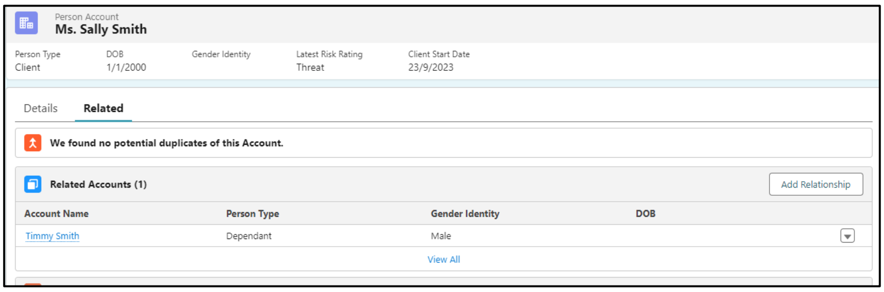
You will be taken to the *New Account Contact Relationship* screen and the Dependent Account will be populated in the Account field.

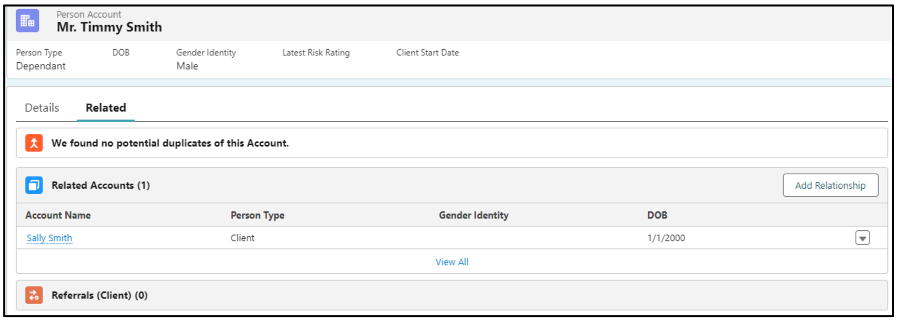
Select the **Dependents relationship with the Contact**, and the Contacts **Relationship with this Account** (see below where Timmy Smith (Dependant Child Account) is the Child, and Sally Smith (Client Account) is the Parent or Carer.

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>

Process CRP Updates

All CRP updates need to be confirmed (to remove the flag) after being viewed and/or actioned where required.

At any time, NSW Police may make an update to a CRP referral, and this information will be sent to DFV Connect through CRP. This is identified in the DFV Connect by:

1. **WDVCAS Service Area – Work Allocation** list view: this flag will appear **CRP referral update flag** which indicates when a CRP referral has an update that is yet to be viewed/actioned. This list view will only show updates on referrals which have not yet obtained consent.
2. **WDVCAS Service Area – CRP Updates** list view: this list view contains all CRP referrals that have received updates and are yet to be viewed/actioned. This list view includes all open and closed referrals for the service area. You should check this list view as well as your work allocation list view as the work allocation list view only displays open referrals where consent is not yet recorded. The WDVCAS Service Area list view will be most useful to view referrals that have cases linked to them.

Referral fields updated by NSW Police will be recorded in the history section of the referral and other party history sections (on the related tab in these components) and you can check these sections to see what has been changed. The referral and/or other party history section will indicate what field has been updated with the old and new values. You should also review the DVSAT to see if new information has been populated. If there has been an update made to the DVSAT the created date will be changed on the DVSAT.

Please note only the referral and other party sections will indicate what values have been updated by police, if the DVSAT has been updated there will be a new version provided.

Once you have reviewed the new values, you need to 'confirm update' to indicate the referral has been viewed and any actions have been completed so others know. For example, you might have to update the client's person account where the name, address, contact has been updated.

Practice rules

- **Delete requests**, in instances where a 'delete request' checkbox has been ticked. This means NSW Police have marked the referral in their system for deletion. If this is ticked, contact the DVO and see if they mean to delete it.
  - If yes, confirm the update and there is no need to make contact. Close the referral with the reason Incorrect referral.

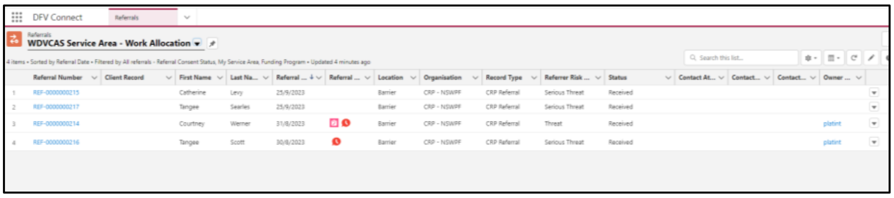
- If no, request they uncheck this delete request so the box is unchecked. You must also confirm the CRP update and make a note in the CRP update comments that this referral is to remain open and record the conversation using the 'log a call' function in the activity timeline.

Notes

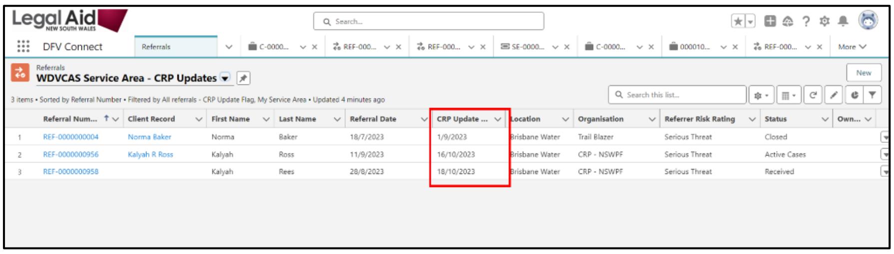
- Almost all CRP referral fields are **not-editable**. This is because any updates received by police will override any changes made in DFV Connect. You can edit some fields on the CRP referral that will not be affected by CRP referral updates.
- To process CRP updates, you may need to update the client's and/or other party's person account to ensure the information is correctly stored.

Process Steps

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>
From the Service Area - Work Allocation List, any time the NSW Police make an update to their referral, the  icon will display under the CRP Update column.
Click on the Referral number (Ref-XXX) to access the referral.



Alternatively, you can check the WDVCAS Service Area – CRP Updates list view. This list view displays all referrals with CRP updates that are yet to be confirmed and/or actioned. This list view also has a CRP Update Date column indicating the date the update was received.



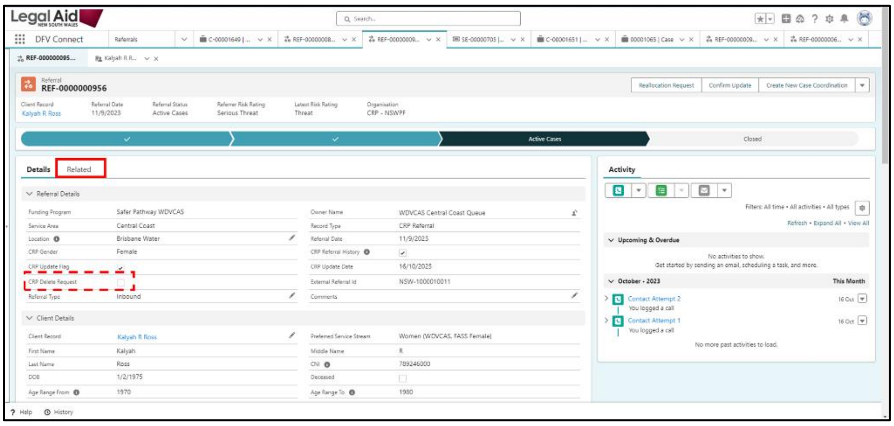
Note: You should check this list view as well as your work allocation list view as the work allocation list view only displays referrals where consent is not yet recorded. The WDVCAS Service Area list view will be most useful to view referrals that have cases linked to them.
</td></tr>
</table>

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

When you access the referral, you should firstly check to see if the CRP Delete Request checkbox has been ticked. If it has, this means that the NSW Police have marked the referral in their system for deletion. If this is ticked, contact the DVO to see if they meant to delete it.

- If yes, confirm the update and there is no need to make contact. Close the referral with the reason Incorrect referral.
- If no, request they uncheck this delete request so the box is unchecked. You must also confirm the CRP update and make a note in the CRP update comments that this referral is to remain open and record the conversation using the ‘log a call’ function in the activity timeline.

Click on the related tab to see if other fields have been updated

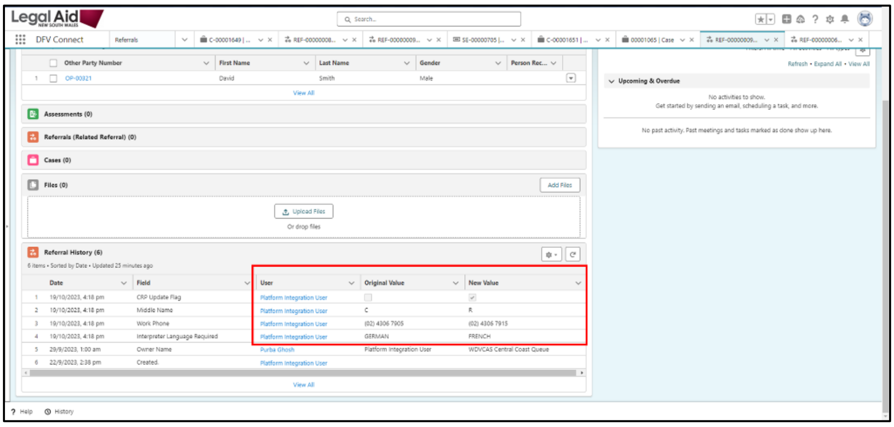


</td></tr>
<tr><td>3.</td><td>

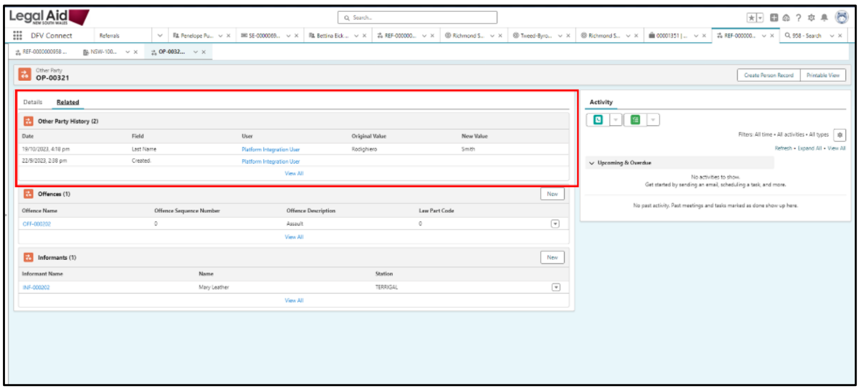
On the referral’s related tab, scroll to the bottom to view the **referral** history.

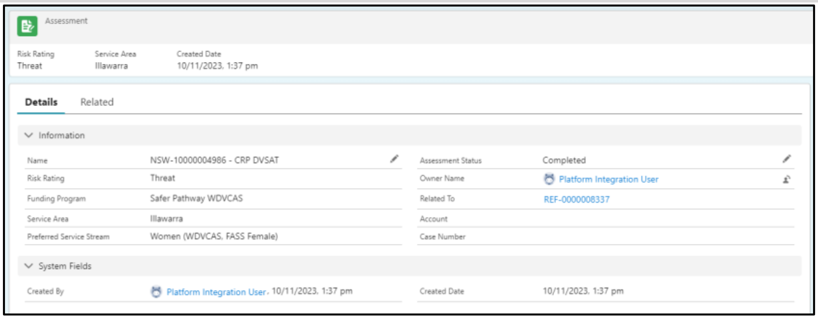
In this section you will be able to see fields that were updated with the old and new values. For CRP updates, the user will be a system name.

This section will also indicate whether delete request has been made.



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

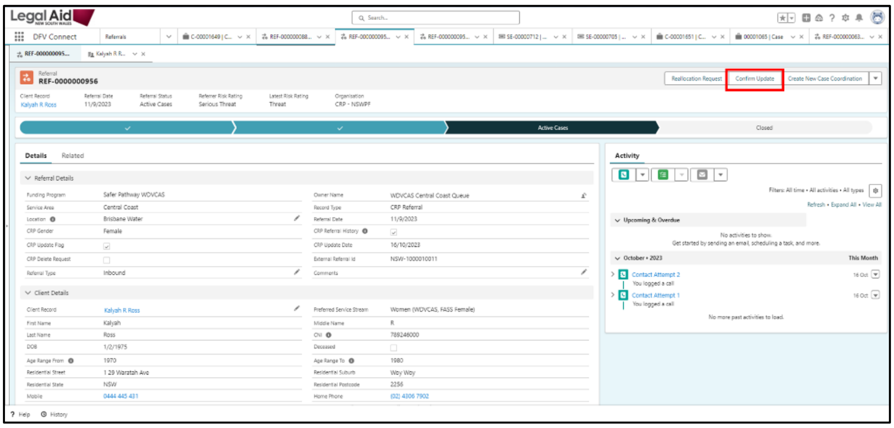
Step	Description
	• **Client details** (for example contact and demographic information): update the client person account. If you believe your service have the most up-to-date details, you are not required to change these details. • **Client's address:** update the client's person account. If the client should now be supported by another Service Provider due to an address change, you will need to reallocate the referral. See reallocating referrals (reallocation request section).
4.	To check whether updates were made to the other party and AVO information, click on the other party number on the related tab of the referral. Click on the related tab of the other party to see the other party history. You may need to update the  If the NSW Police have updated: Information on the referral's other party: • **AVO details:** review the new information so you can better support the client. • **Other party details** (for example, name and additional information): update the other party person account or create the other party account. See link referral to other party account.
5.	To check whether updates have been made to the DVSAT, select the DVSAT name in the Assessment section of the related tab on the referral. Check the **created date** on the DVSAT record to confirm if an update has been made (it will be later than the referral created date field).

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


Review the new information so you can better support the client. This includes any updates to the referrer risk rating.

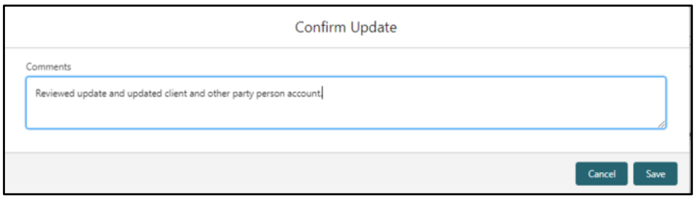
Note: if police have updated information on the DVSAT, you will not be able to see a prior version or history of fields changed. This means you should always check the DVSAT if the CRP referral update flag has been checked.
</td></tr>
<tr><td>6.</td><td>
When you have reviewed the referral update information, updated the client and/or other party person accounts (if needed) or determine the update can be ignored, you will need to **confirm update** to avoid other staff members unnecessarily re-checking the update.

Select the **Confirm Update** quick action button in the top righthand corner (this will only appear when an update has not been confirmed).



</td></tr>
<tr><td>7.</td><td>
The *Confirm Update* pop-up will display.

Enter details about confirming the update in the **comments** section, if required, (eg., confirm delete request made by police was made in error) and select **Save.**



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

Step	Description
	This will remove the CRP Update flag from the Work Allocation list view and the referral will be removed from the CRP updates list view. The flag will re-appear if a subsequent update is processed by NSW Police.

Related referrals

A 'related referral' is a referral received that relates to the same incident for a referral already received and in DFV Connect. These circumstances include:

- There is a CRP referral in DFV Connect and your service subsequently receives an external referral by an external service provider (e.g., Health) with similar incident details, same POI, time & date of incident etc.
- CRP Referrals with the same event number for the same client
- There is a CRP referral in DFV Connect and the client self refers to your WDVCAS

Please note you should always link subsequent referrals to the **original referral** received so the referral history is properly recorded. This means you should not link a referral to another referral that has the related referral field filled.

All related referrals must be closed after linking to the original referral.

Practice rules

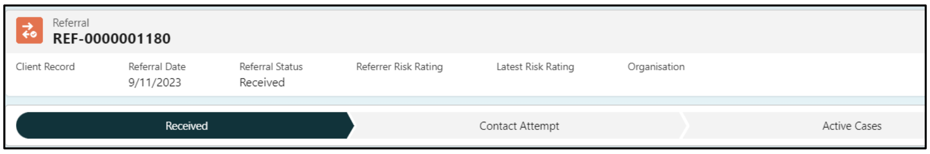
- When you receive an external referral (either from another provider or client themselves), search DFV Connect to see whether there is an existing referral relating to the same DFV incident and POI. Contact the client to confirm it is for the same incident and there hasn't been a new incident you may be unaware of.
- If there is no prior referral located in DFV Connect that relates to the same incident, you must create a manual referral in DFV Connect to ensure the referral is properly recorded and managed.
- In instances, where an additional CRP referral is received and you identify it has the same event number, same POI, incident date and time, contact the DVO to check whether it is a duplicate referral.
    - Where a duplicate referral is confirmed, you should process the referral as a related referral (see process steps below)
    - Where it is a new incident, action the referral per usual practice.

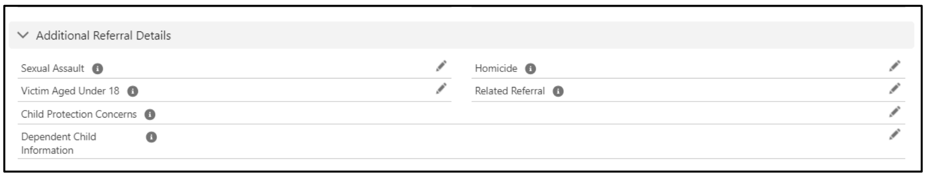
Process steps

Step	Description
	Once you have confirmed there is already a referral in the system that relates to the same incident of a subsequent referral received, you can relate the new referral received to the original referral. See below process steps on how to relate the new

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>referral to the original referral and assumes there is already a referral created in the system.</td></tr>
<tr><td>1.</td><td>

On the new referral received/created, scroll to the **related referral** field in the Additional Referral details section.



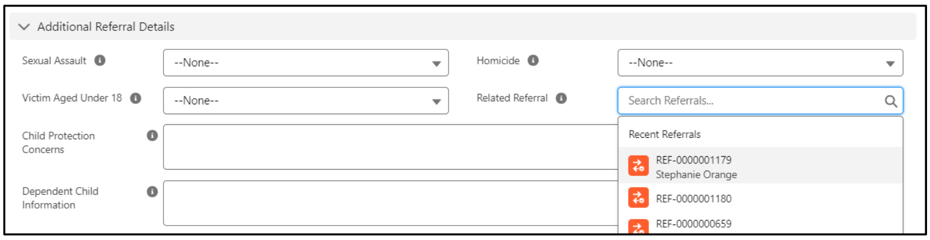


</td></tr>
<tr><td>2.</td><td>

Select the pen icon to link the **related referral.** The system will always display the most recently accessed referrals.

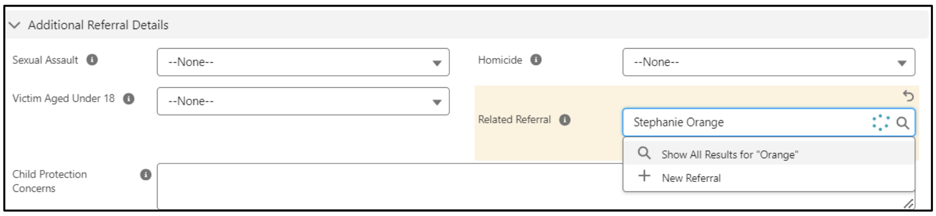
It is assumed that you have previously searched and reviewed the original referral to link the new referral to, so this should be the most recent record accessed.

Select the referral if displayed.



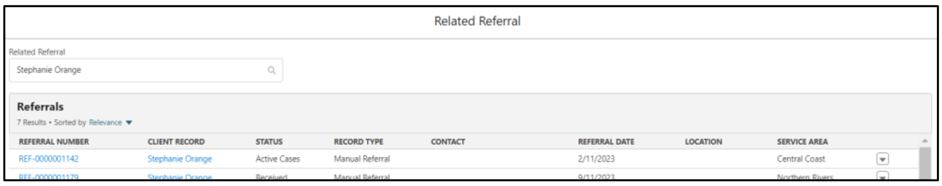
</td></tr>
<tr><td>3.</td><td>

If the referral is not available, you can **search** the client's name to view all referrals for the client and select the correct referral. Select **Show all results** to see all referrals.

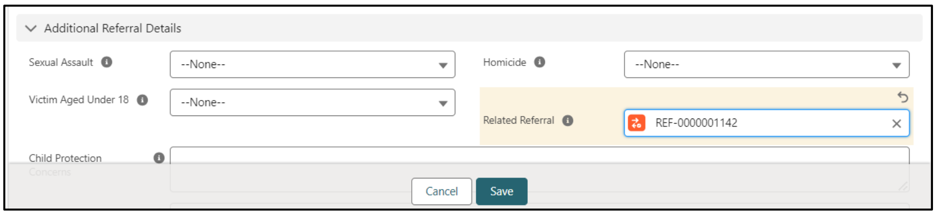
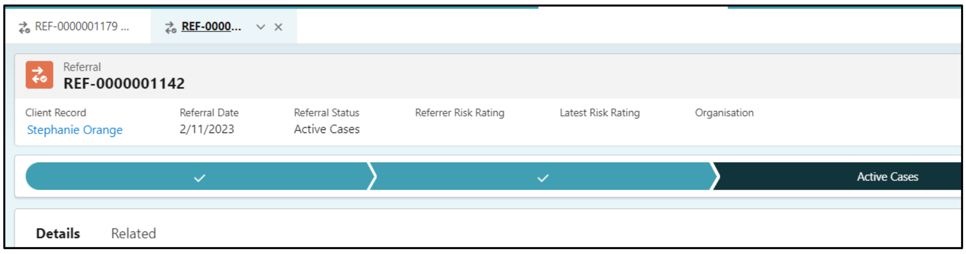
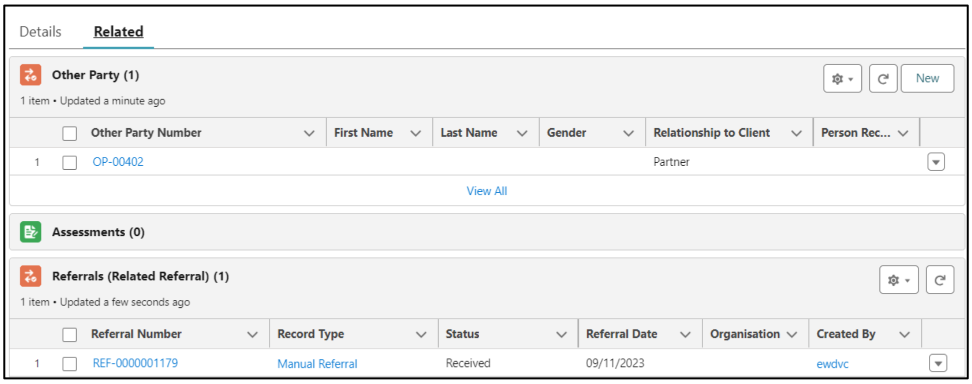


</td></tr>
<tr><td>4.</td><td>

The search results will display in a new window. **Select the referral number.**



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

Step	Description
5.	The referral number will populate into the related referral field. Select **save**. 
6.	The original referral will now appear on the referral record. To confirm the referral has been successfully related, click on the original referral. 
7.	On the original referral, click on the related tab. 
8.	If it has been successfully recorded, the referral will appear in the **Referrals (Related)** section of the original referral. 
9.	All related (subsequent) referrals must be closed as cases and information will be created from the original referral. See section **close referral** for process steps. **Note:** if the original referral received was 'serious threat', the related (subsequent) referral will automatically populate onto the SAM agenda if it has been properly recorded.

Multiple active referrals for the same client

WDVCASs may receive multiple referrals for the same client from the CRP or external providers over a short period relating to multiple domestic and family violence incidents.

For example, you may receive a CRP referral regarding an incident that has occurred on a Saturday night. By Monday, the client reports to police that the POI continued to harass her over the following day, so another CRP referral is received on Monday morning in relation to this new incident. This is referred to having multiple active referrals for the same client as your service will have two CRP referrals for the same client in relation to separate incidents.

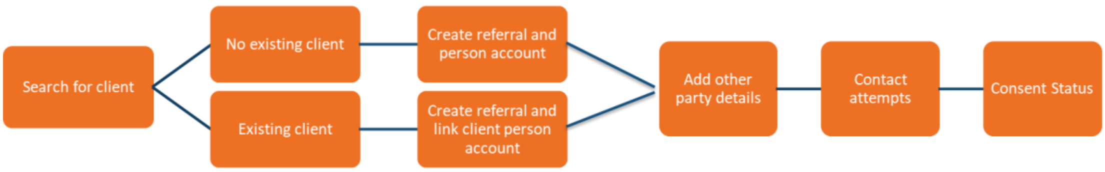
Multiple active referrals for the same client must be treated as separate referrals and should not be processed as a related referral. If the referrals are 'serious threat', a separate SAM case must be created for each referral, and both should remain open until services are complete.

Practice rules

- Action referral as normal in DFV Connect, contact the client again to check in that they are safe, and offer support as circumstances can change quickly.
- If making contact attempts for multiple referrals for the same client and the same POI in the one day, only make one attempt per day and record the actions and outcome of the attempt in the clients' other referrals to ensure all of these referrals KPI's are being met.
- If the client consents to support, you should create a case coordination case for each referral. However, you should only record services and support within the main case coordination case. You should record the main case coordination case number and make a note in the description field on the additional cases.

Process manual referrals

Where referrals are received outside of the CRP (e.g., self-referred, another service provider), you can create a 'Manual Referral' in DFV Connect to record the referral.



Practice rules

a. All manual referrals must be entered into DFV Connect (eg., self-referrals, referrals received by Corrective Services – DVEM, external service providers, etc.)

b. You should always search to see whether there is an existing client person account before creating a manual referral.

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

Notes

- See **related referrals** section where referrals received relate to the same incident. For example, a referral is received by an external service provider that relates to the same incident of a CRP referral in the system.
- Category field: this field refers to the category of the referring organisation.

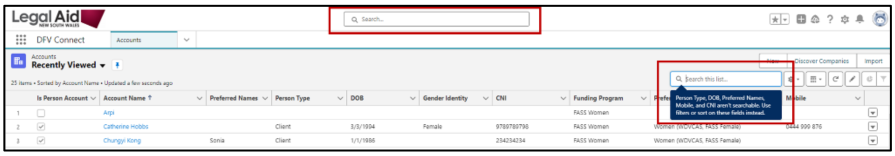
Process steps

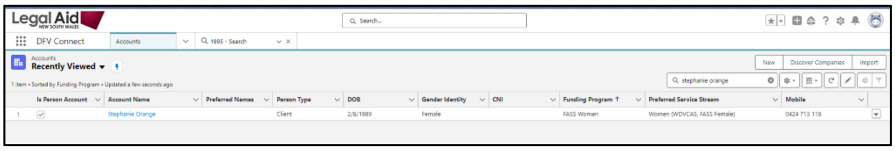
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>Before creating a referral manual referral, check to see whether there is a client record in DFV Connect.

There are few ways you can search for a client in DFV Connect.

1. Using the global search function. This searches for all records and components in the system. This is the search bar at the top of the screen.

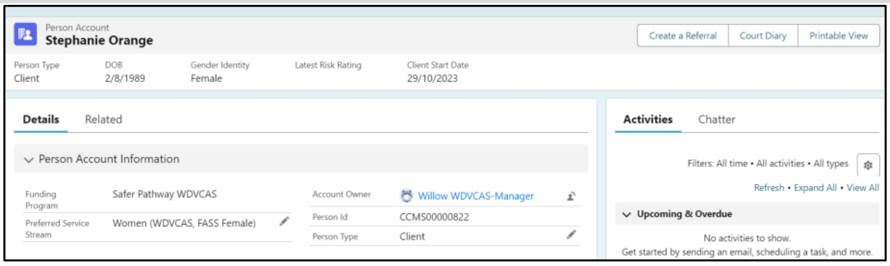
2. Selecting Accounts from the main menu and using this search bar. Only names can be searched in this search bar, if you need to search other criteria (eg., DOB, use the global search function).

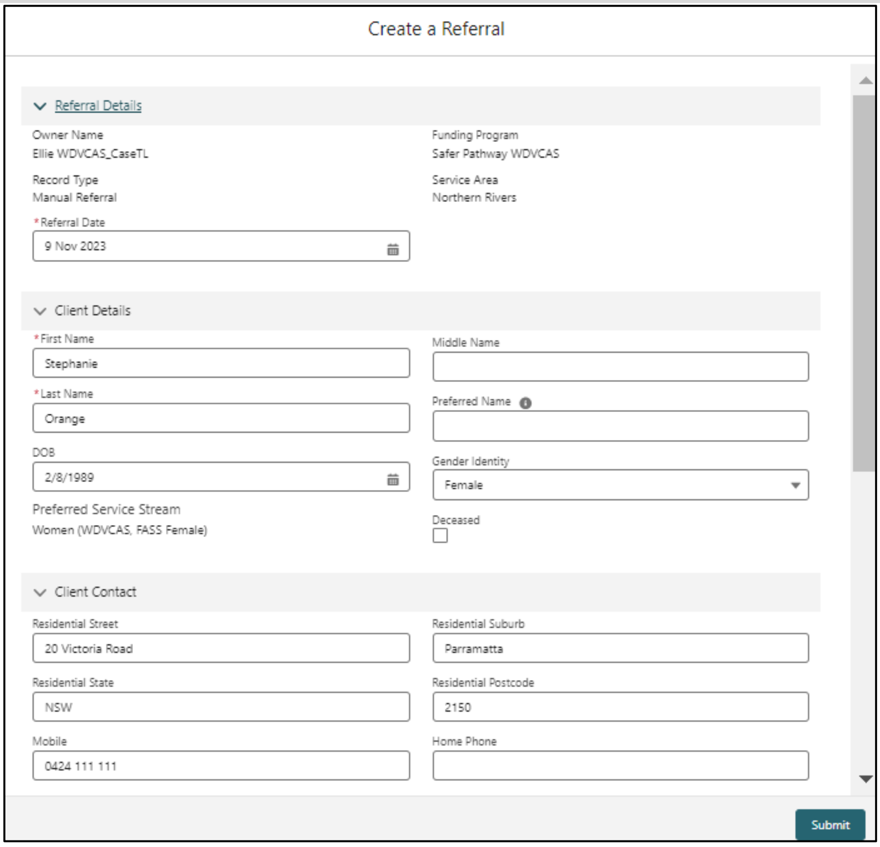

</td></tr>
<tr><td>2.</td><td><table><tr><td>Existing client person account found</td><td>Go to step 3</td></tr><tr><td>No existing client person account found</td><td>Go to step 7</td></tr></table></td></tr>
<tr><td>3.</td><td>If the client exists, access their account by selecting on their name (blue hyperlink).


</td></tr>
<tr><td>4.</td><td>If there is an existing client in the system you should create the referral from the person account so you do not have to duplicate client details onto the referral.

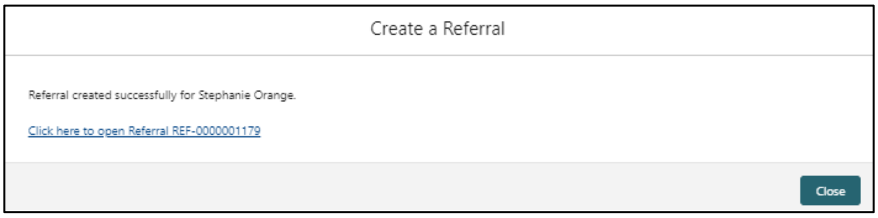
Before creating the manual referral, you should make sure the client details are up-to-date as this information will populate onto the referral.

To create a manual referral for an existing client, from the client person account, select the Create a Referral quick-action button in the top righthand corner.</td></tr>
</table>

Step	Description
	
5.	The *Create a Referral* quick-action pop-up will appear. All client details from the client person account will automatically populate onto the referral. This pop-up does not contain all of the required referral information - you must save the referral to enter key referral information. Key fields: • **Referral Type:** is a mandatory system field that cannot be removed, it does not matter which option is selected (inbound/outbound) • **Location:** Select the referral location. The referral will always be created with your staff funding program and service area. • **Referral date:** enter the referral date. • **Preferred service stream**: will default to WDVCAS and cannot be edited. Select **submit** to create the referral and enter required referral information.

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


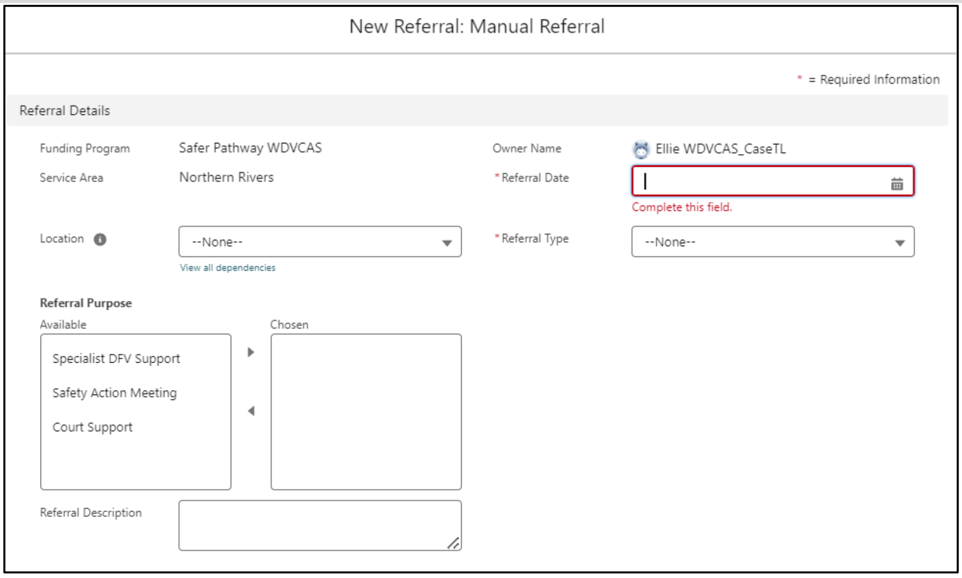
</td></tr>
<tr><td>6.</td><td>
A success message will be displayed. You can open the referral by clicking on the link in the notification. If you select close, you can also access the referral in the related tab of the client account. Go to step 9.



</td></tr>
<tr><td>7.</td><td>
If the client does not have an existing record in the system, you should create a referral and then link/create the client person account.

To create a manual referral for a new client, select Referrals from the Main Menu. On the list view, select New to create a manual referral.

</td></tr>
<tr><td>8.</td><td>The New Referral: Manual Referral quick-action will appear.</td></tr>
</table>

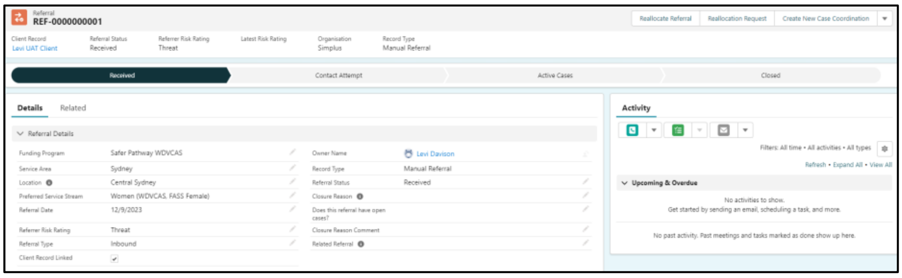
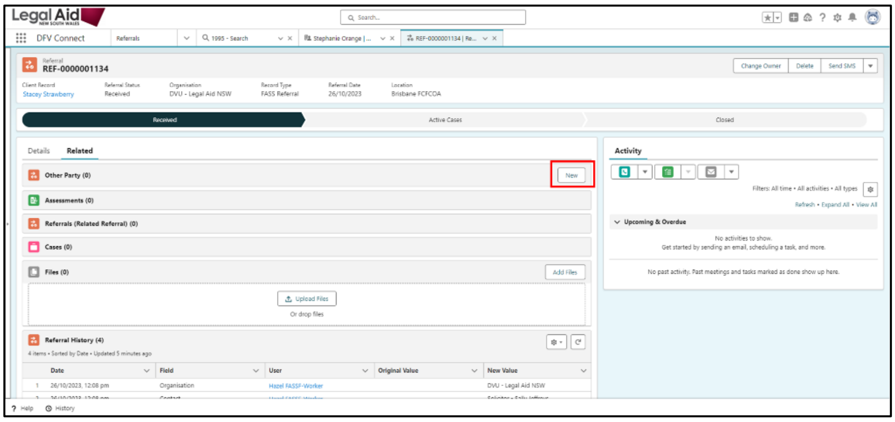
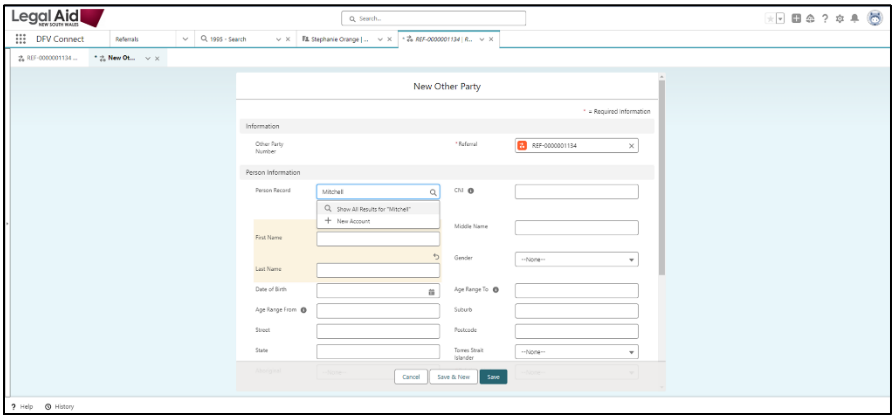
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>


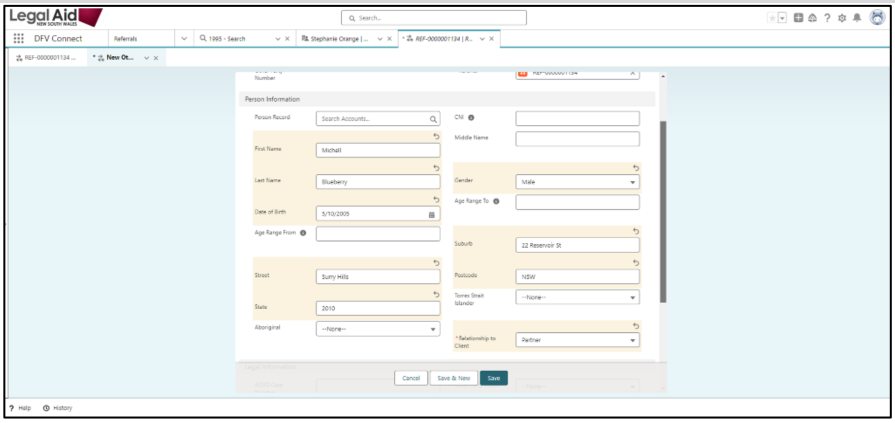
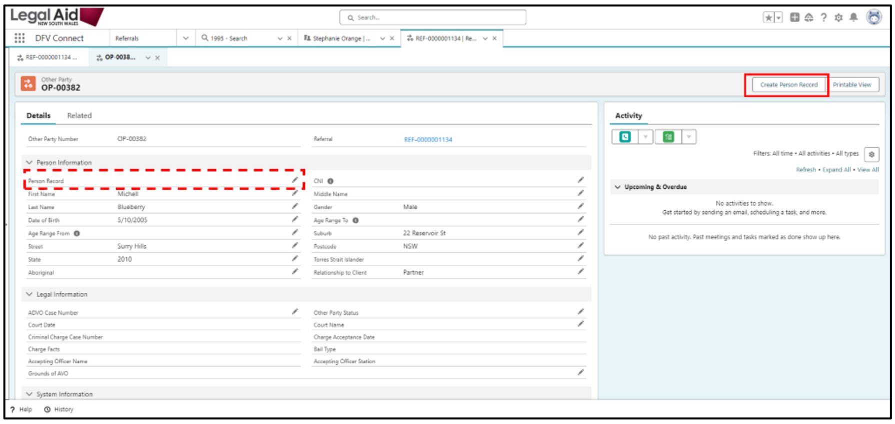
The Manual Referral form is divided into following areas:

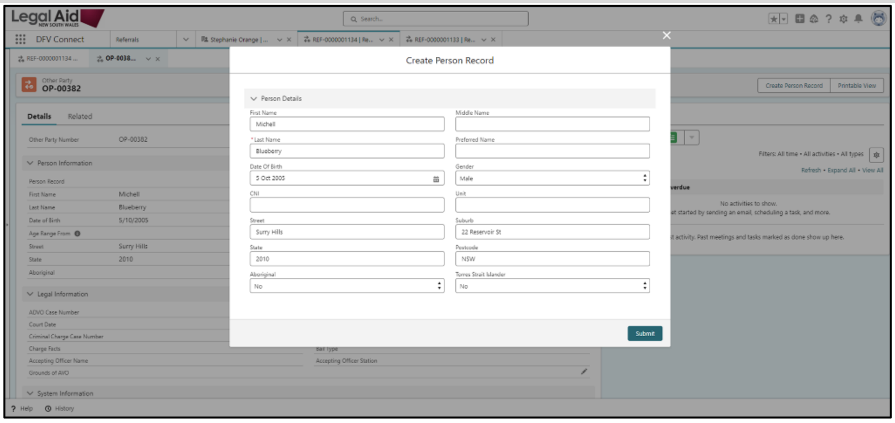
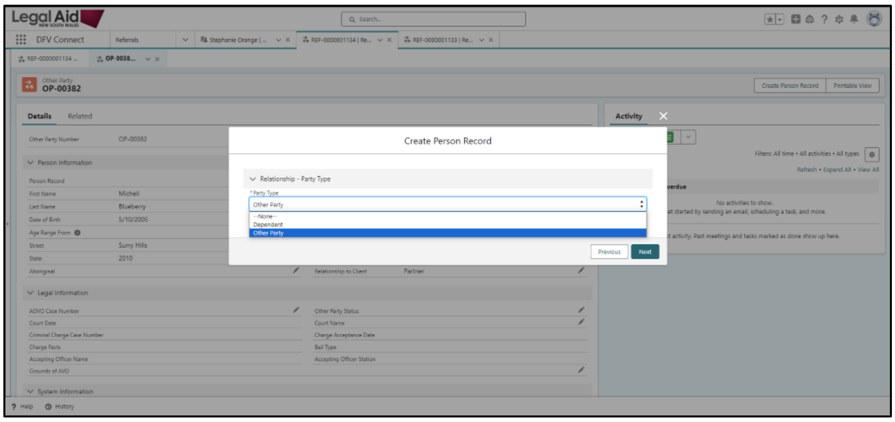
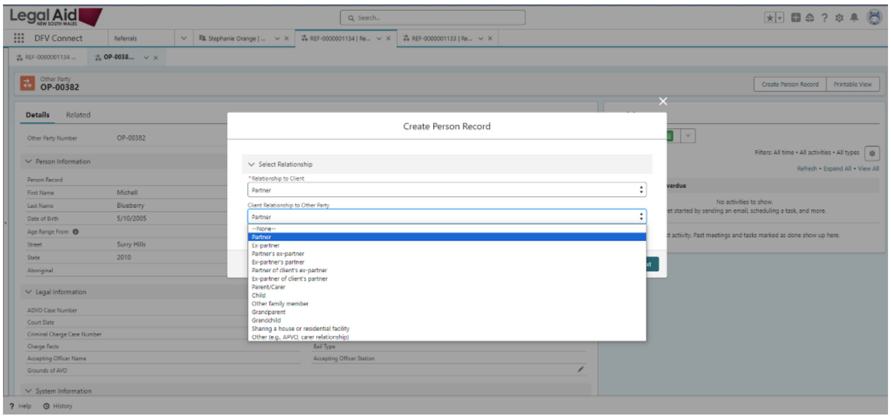
Referral Details - Funding Program, Service Area, Location, Referral Date, Referral Type, Referrer Risk Rating, Referral Purpose,] and Description
Contact Attempts - Contact Attempts, Consent Dates, Consent Mode, Consent Status
Referrer Details – Self Referred tick box, Contact, Referrer Phone and Email, Category, Organisation, Referrer Mobile
Client Details - You can search for existing client record, if client doesn’t exist enter as many details as you can (phone number cannot have any spaces or brackets included)
Client Demographics - Aboriginal, Country of Birth, Culturally and Linguistically Diverse, Interpreter Required. LGBTQIA+, Disability, Torres Strait Islander, Temp Visa, Primary Language…
AVO and Charge Details – AVO Case Number, Charge Case Number
Additional Referral Details – Sexual Assault, Victim aged under 18, Child Protection Concerns, Homicide, Dependent Child Information
Conflict of Interest - Conflict of interest, Conflict of interest description
Referral Status – For new referrals, leave the status as Received and ignore the other fields.

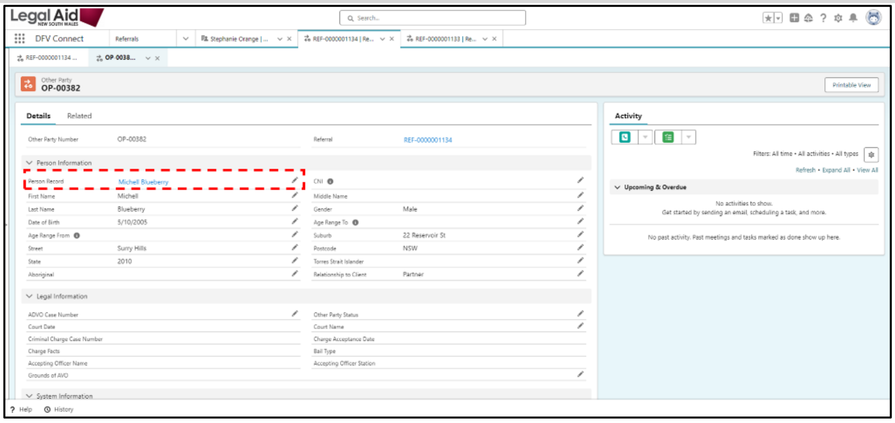
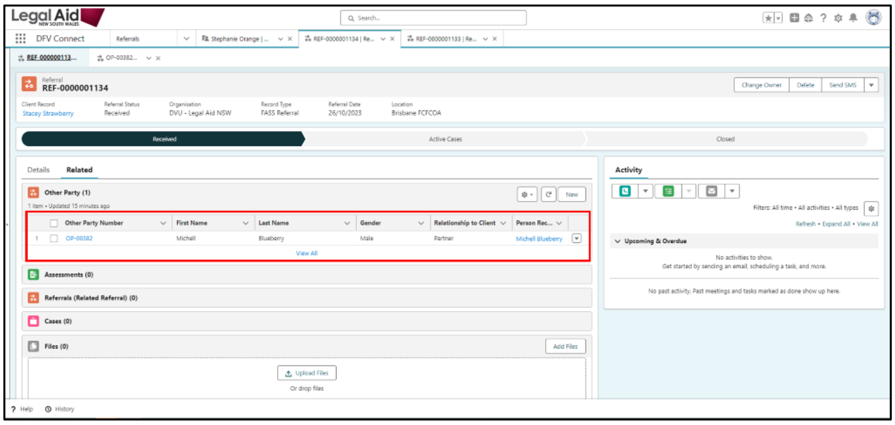
Complete as many fields as you can and ensure that you complete the mandatory fields marked with asterisk.

Once complete, select Save.
</td></tr>
</table>

Step	Description
9.	The *Referral* screen will be displayed. The status will be **Received**. 
10.	To add the Other Party details, select the **related** tab on the referral. Select **New** on the **other party** section. 
11.	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. 
12.	Enter the other party details and **save**.

Step	Description
	
13.	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. 
14.	A quick-action pop-up will appear Similar to creating the client person account, the information will be pre-populated.

Step	Description
	
15.	You will need to select the type of person account as ‘other party’. 
16.	Select the relevant relationships. 
17.	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.

Step	Description
	
18.	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. 
19.	If the client has consented to support and you need complete the DVSAT, you will need to create a case coordination case. See create case coordination case and DVSAT for process steps.

Clients and cases

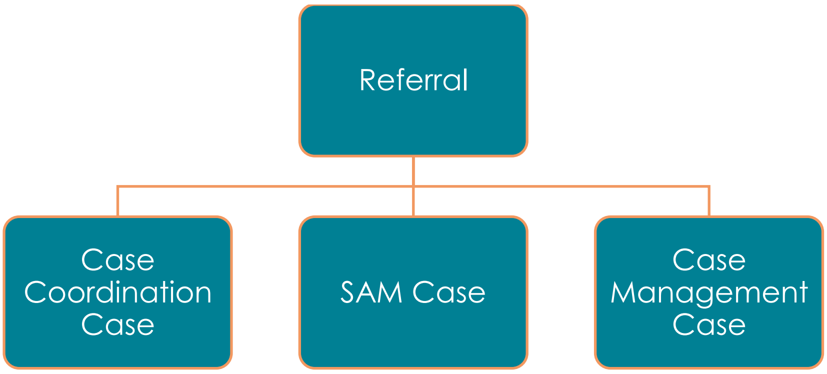
All referrals must be linked to a person account (client) when they are received. The client start date is therefore recorded when the **first case** has been created for the client.

All cases are created from a referral.

Visibility	All cases are **visible** and editable by users within your service area.

There are three types of cases in DFV Connect, depending on the type of service required by a client:

Case	Description	User
Case coordination case	Created for when consent has been obtained and services are required. This case is similar to a client file and contains all information regarding case coordination services provided for a referral.	All workers
Case management case	Created for current WDVCAS clients where they have been assessed as suitable for casework.	Caseworkers
SAM case	Created for 'at serious threat' referrals.	SAM coordinators

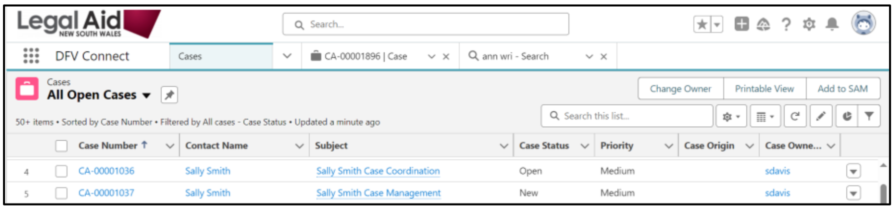
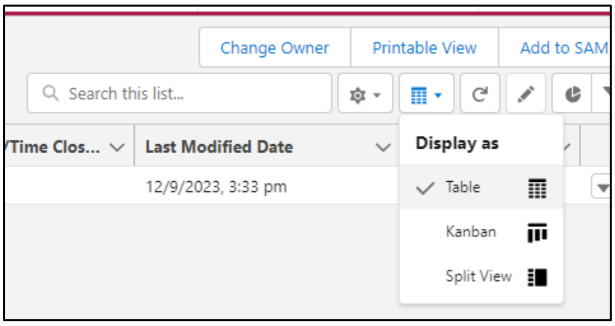
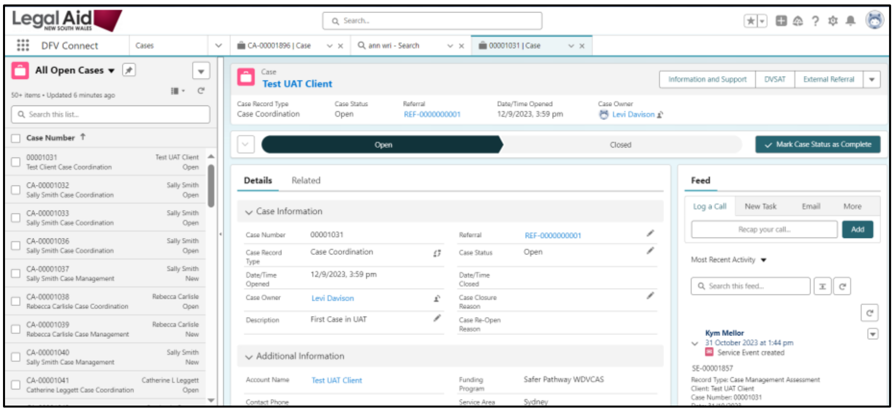


View open cases

All referrals can be accessed by selecting 'Cases' from the main menu and accessing a list view displaying high-level information about cases and can be selected depending on your activity needs.

You can access certain referral list views to see information about cases.

Process steps

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**. Click on the relevant Case Number to open it. 
2.	The list of all cases you are owner will be displayed. To open the Case, simply click on the link. 
3.	If desired, you can change the view. E.g. switch from a Table View (cases displayed as a table of records – see screenshot above). 
4.	If you select the Split View - left hand side of the screen displays the list of records, and right-hand side of the screen display the overview of the selected record. 

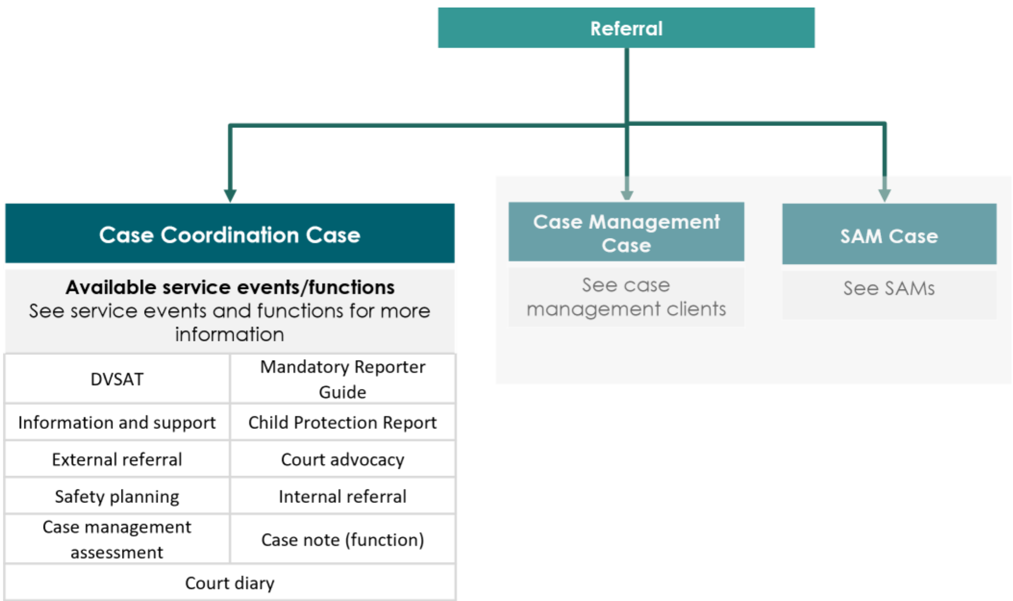
Case coordination clients

Following receipt of a referral and when consent is obtained, WDVCASs will provide case coordination to provide support.

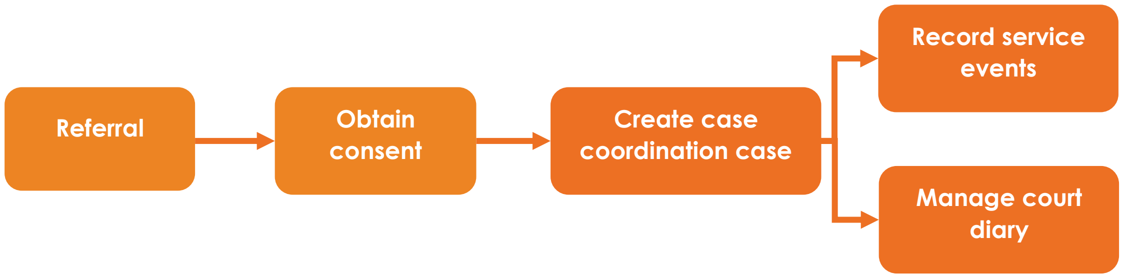
In DFV Connect these services are recorded within a case coordination case. The purpose of a case coordination case is to record all service events and manage clients. A case coordination case is created from a referral and when consent has been obtained.

Case coordination services include (you can record all of these within a case coordination case):

- Assess her level of threat using the DVSAT
- Provide information and support
- Make referrals to external services, FASS Women and other WDVCASs where needed
- Assist with safety planning
- Provide court advocacy support
- Ensure they comply with mandatory reporting obligations including completing MRG and making a child protection report where required
- Complete casework assessments for clients within their WDVCAS



System process

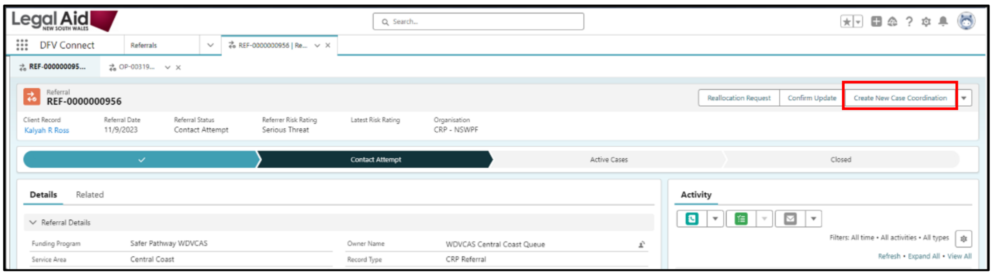


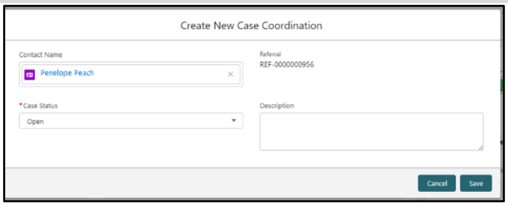
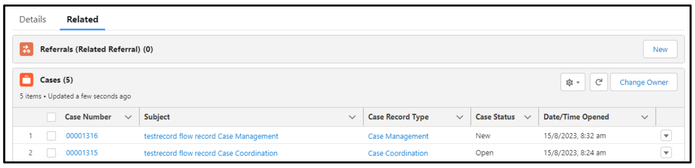
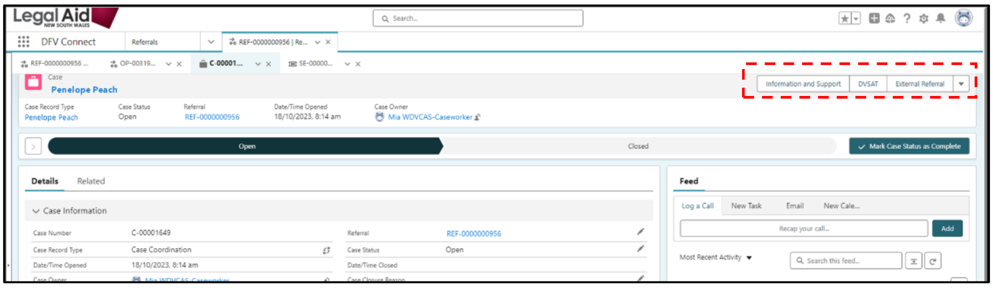
Practice rules

- Consent must be obtained by the client before you can provide case coordiantion services to a client.
- Only one case coordination case can be created per referral received.
- Where the client is a supported by a hearing support worker, select the ‘hearing support client’ checkbox.

Create case coordination case

Process steps

Step	Description
1.	From the Referral click on the drop-down menu on the right-hand side of the screen and select the **Create New Case Coordination** option.  If the Create New Case Coordination button isn’t available, check that the Person Account has been created and consent has been obtained and recorded.
2.	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.

Step	Description
	
3.	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. 
4.	The *Case* record will be displayed. You can now record Service Events such as Information and Support, Safety Planning etc. 

Service events and functions

Description

A service event typically refers to an interaction or action related to providing service or support to a client or on behalf of a client. Service events in DFV Connect function as a comprehensive record of all interactions and activities related to your clients and are crucial for tracking services and support provided to your client, ensuring accountability and consistent and effective service delivery.

Each client may have one or several service events created within their case.

Practice rules

a. Service events should be completed at the time of providing a service or shortly afterwards. This allows the client history and actions to be accurate and up to date.

b. A service event must be recorded for each action provided by a WDVCAS to the client directly, or to another service on behalf of the client.

Notes

Service event	Description
DVSAT	The Domestic Violence Safety Assessment Tool (DVSAT) is a standard means of assessing the level of threat to people experiencing domestic and family violence.
Information and support	When any information and support is being provided to the client and to record detailed conversations you have with the client or to record details of contact on behalf of the client
External Referral	An external referral is used when sending the referral to any provider that it not using the DFV Connect system, where consent has been provided
Safety Planning	to address clients' immediate safety needs
Mandatory Reporter Guide	This action is used to record that the online MRG is completed
Child Protection Report	This action is to record that a Child Protection Report has been made
Court Advocacy	To record contact relating to the client's court matter – Mention, Hearing Charges etc
Prepare Internal Referral	Is used to send the referral to another provider within the DFV Connect system e.g. Court support or FASS Women
Case Management Assessment	WDVCAS workers will complete a case management assessment for intake and for the WDVCAS Manager to review *(see refer client for casework for description)*
Function	**Description**
New Note	Notes to attach to client's file. Saved notes are not recorded as service events. This function is not used to record a client's sensitive or personal information.

Complete DVSAT

Description

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.

Referrals received through the CRP will have a DVSAT Risk Rating, as it is mandatory for the NSW Police Force to complete a DVSAT with every victim of domestic and family violence where the victim is 16 years and other party aged 10 and above.

WDVCASs are mandated to complete the tool with victims as part of Safer Pathway. All other service providers are encouraged to use the tool where appropriate. External referrals received from other service providers may also have a risk rating included.

WDVCASs need to re-assess the level of threat to client safety using the DVSAT when they contact a client. A DVSAT assessment can be completed from any type of case.

This is important because:

- The threat level may have changed since the incident or report that caused the referral being made
- The threat level identified by the referring service provider may not be accurate. For example, a woman may not feel comfortable disclosing certain information to the NSW Police Force but may be more forthcoming with a WDVCAS worker.

Please refer to the WDVCAP Policy and Procedure manual for more information on the DVSAT, regrading a client's threat level.

Case availability

Service event	Case coordination	Case management	SAM case
DVSAT	✓	✓	✓

Practice rules

a. Check it is safe to complete the DVSAT or arrange another time to do so

b. The DVSAT used by WDVCASs aim to elicit the same information as the NSW Police Force DVSAT however the questions are worded and ordered differently. The DVSAT is also completed using a more conversational approach.

c. Check if the client needs an interpreter

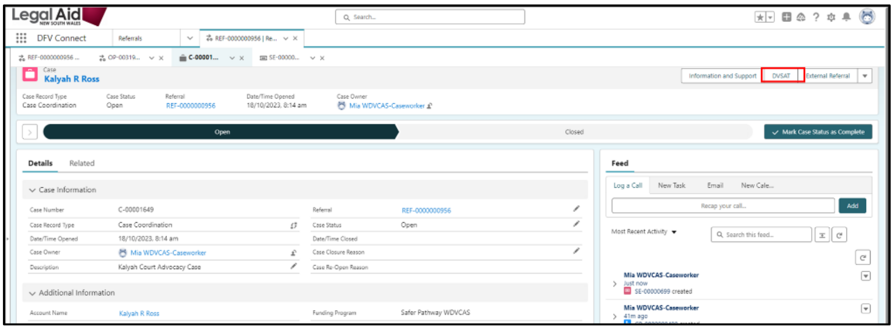
d. Apply a trauma informed approach.

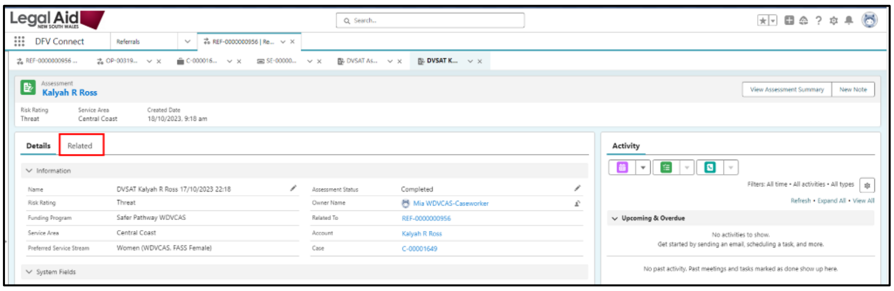
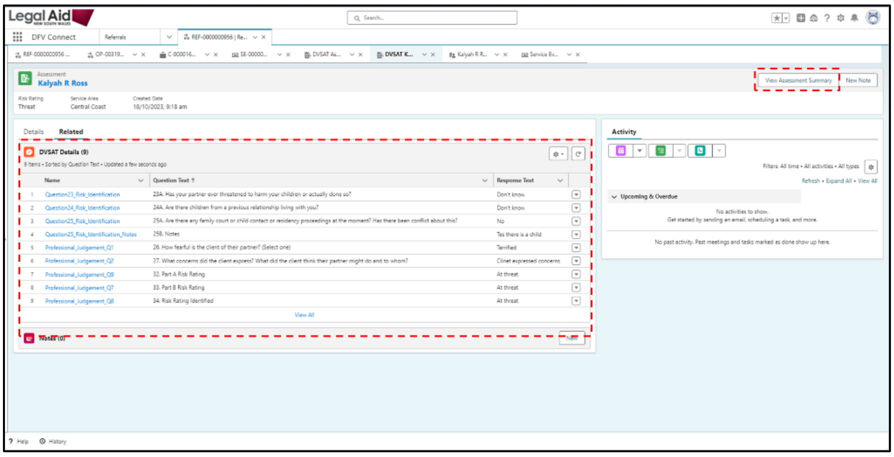
e. If you are unable to complete all the DVSAT questions choose "Don't Know" and enter the reason in the free text box or "Don't Know" can be used when the client is not sure e.g., does the other party have alcohol or other drug issues? And she says, 'he used to but I'm not sure now,' or he used to have access to guns but not sure now.

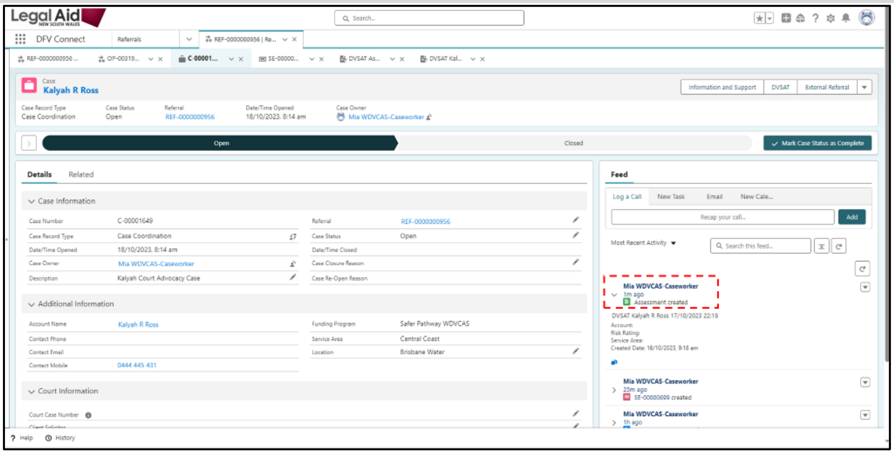
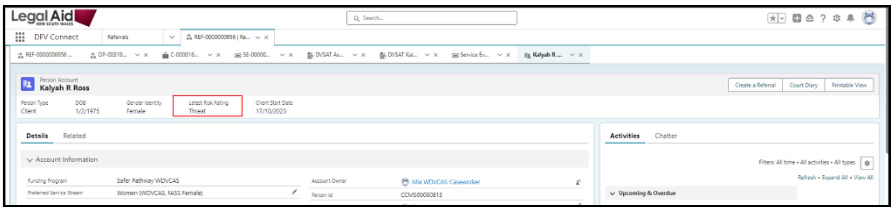
f. If the questions are not applicable for the victim e.g., non-intimate relationships, choose "Don't Know" & then "N/A" in the comments.

g. If you are unable to complete the DVSAT you can add a comment to explain this.

Process steps

Step	Description
1.	From the Case, click on **DVSAT** in the quick action bar (top menu). 
2.	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** 
3.	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** 
4.	The *Competed* page will be displayed. Click **Next**

Step	Description
	
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. 
	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 rating has been upgraded to Serious Threat, the referral will now appear on the SAM Coordinators List View - At Serious Threat Referrals.

Information and support

As noted in the WDVCAP Policy and Procedure Manual, WDVCASs can provide legal information but do not provide legal advice. If a client needs legal advice, they must be referred to a legal service or legal practitioner (see external referral service event for more information).

When contact is made, and consent has been obtained you can record all detailed conversations with the client or on behalf of the client in Information and Support in the service event summary section.

A client can have one or more information and support service events.

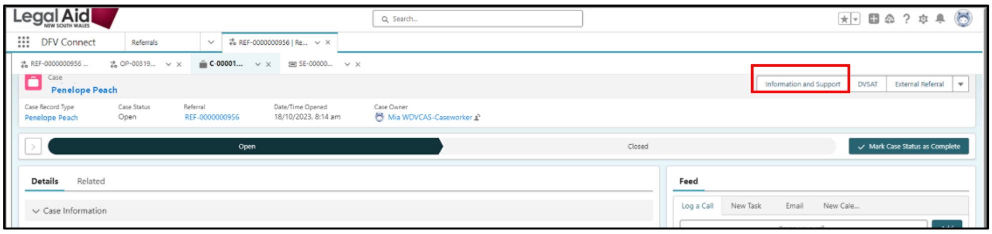
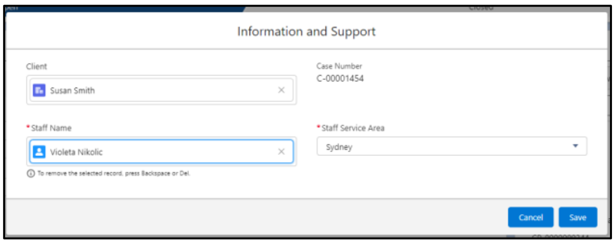
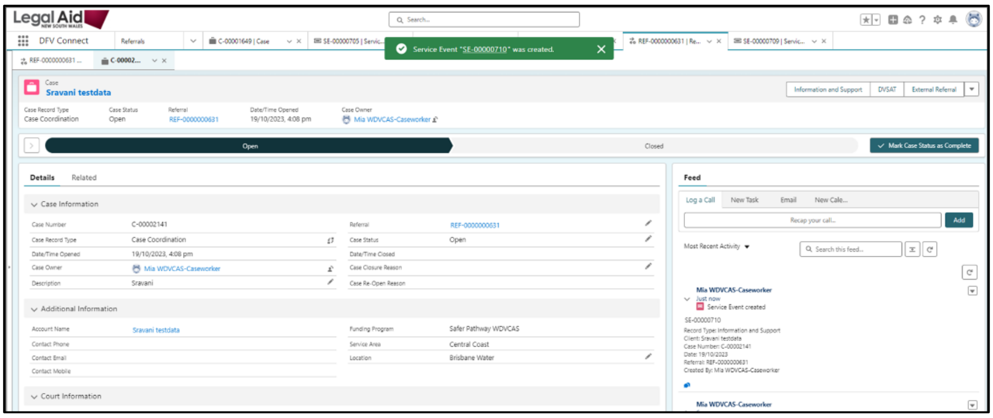
Case availability

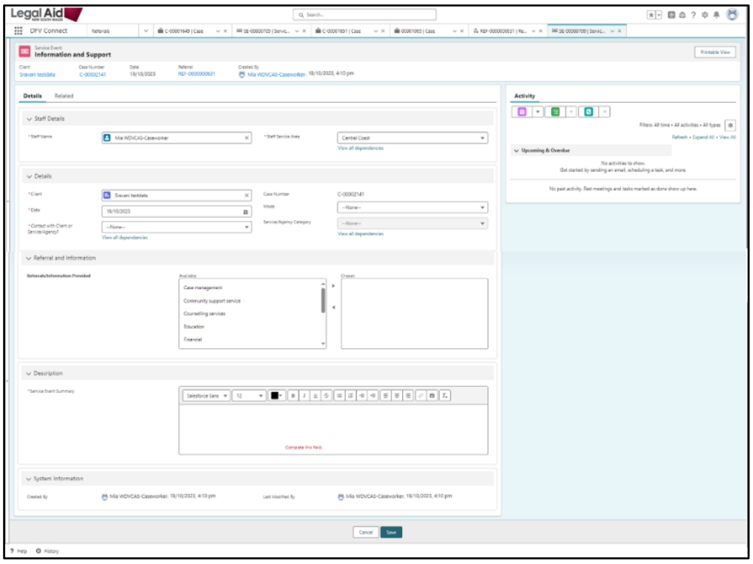
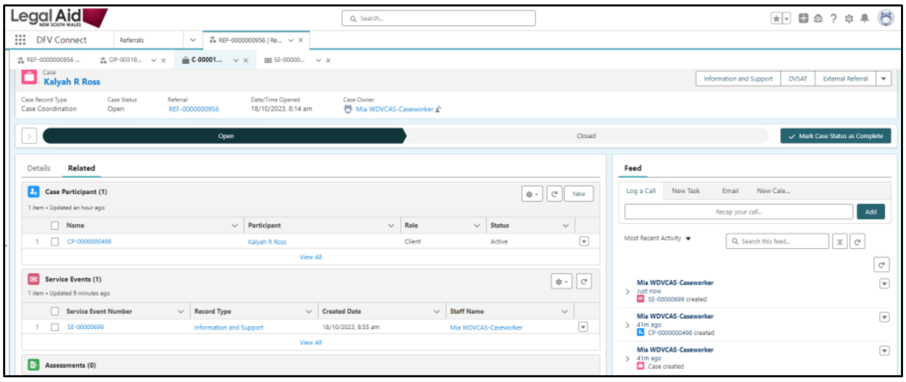
Service event	Case coordination	Case management	SAM case
Information and support	✓	✓	✓

Practice rules

- Where hearing support is provided to a client, ensure 'hearing support' is selected in the referrals/information provided picklist.

Process 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. 
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 find the Service Event on the **Related** tab of the **case** record, under the **Service Events** area. 
4.	The *Service Event* will open. Click a **pencil** icon to edit the details. • 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.

Step	Description
	Telephone • Select the option that represents what type of **Information**/cold referral you provided. Options are: Case Management, Community support services, Counselling services. Education, Financial, Health, Housing, Legal, Police, Victim Services, Other. • 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 (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 available from Related tab. 

External referral

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

When creating an external referral do not enter any details from the NSW Police CRP referral, DVSAT or narrative in the Referral Description as this should not be shared with External Service Providers. You may choose to share the WDVCAS DVSAT or threat rating with the external service provider.

Case availability

Service event	Case coordination	Case management	SAM case
External referral	✓	✓	✓

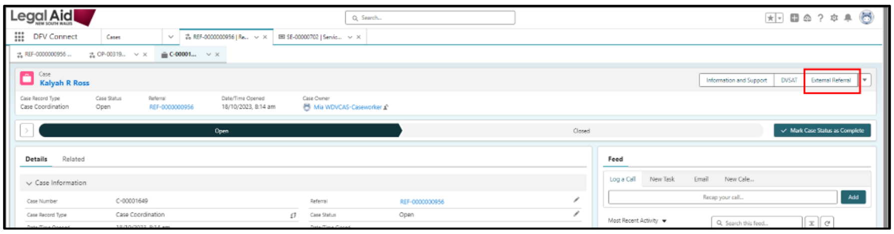
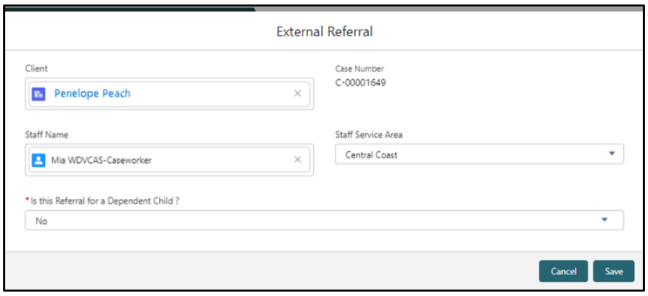
Practice rules

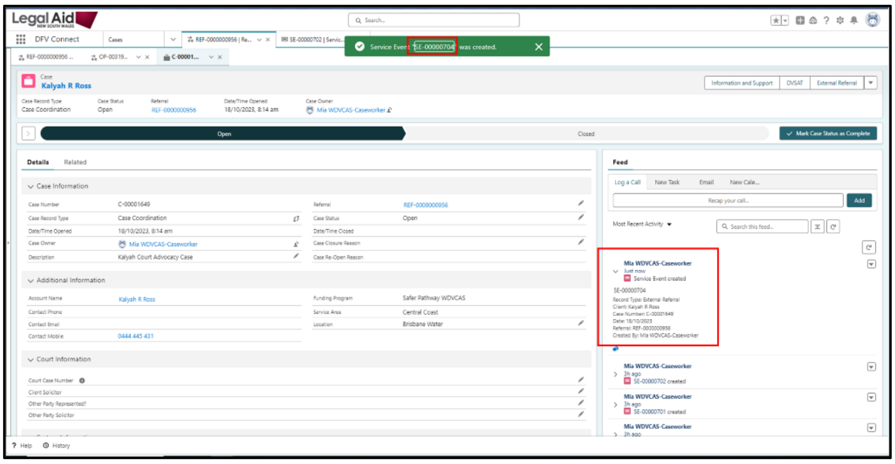
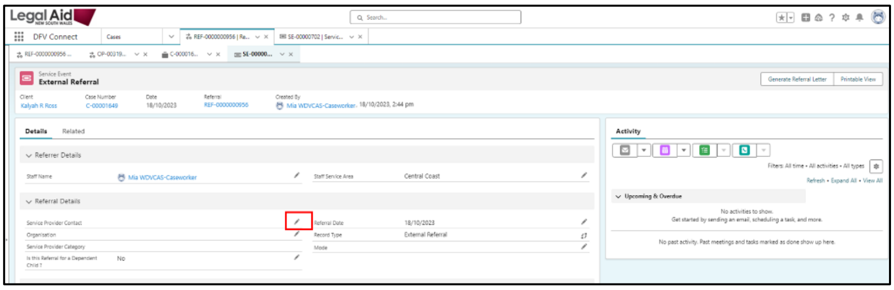
a. Obtain consent from the client to make an external referral on client's behalf

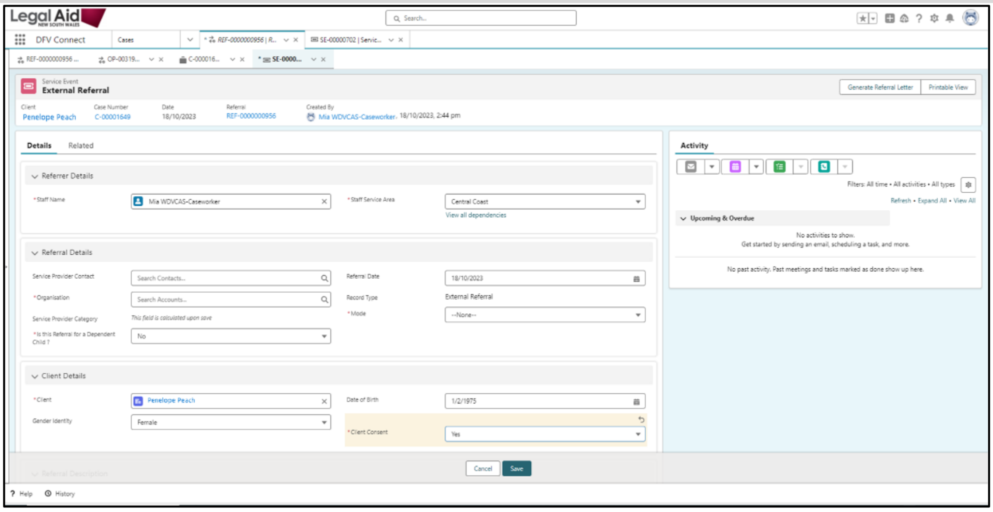
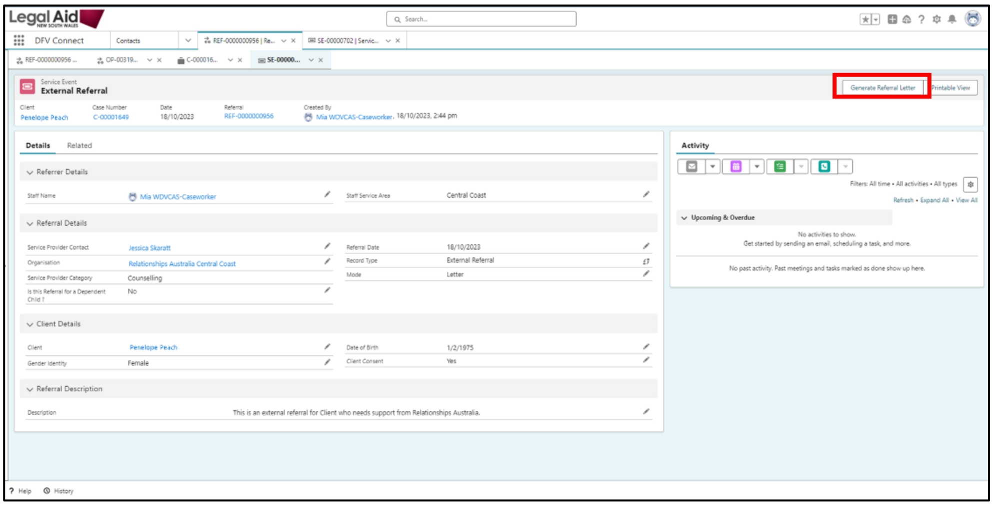
b. Create an external referral for each separate external warm referral made for the client

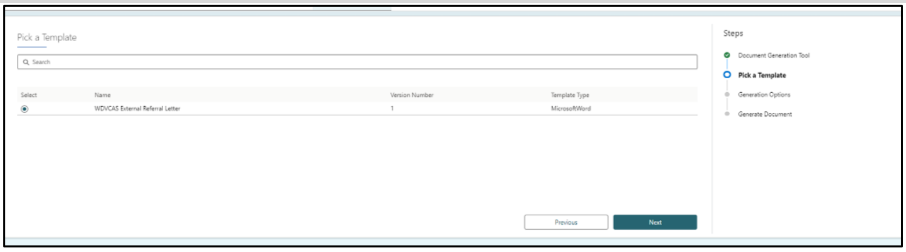
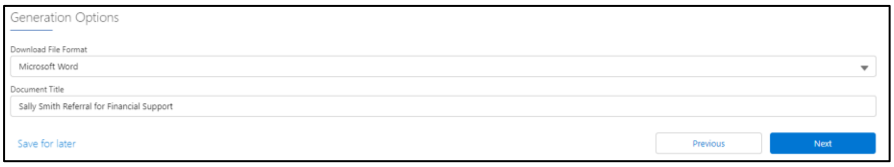
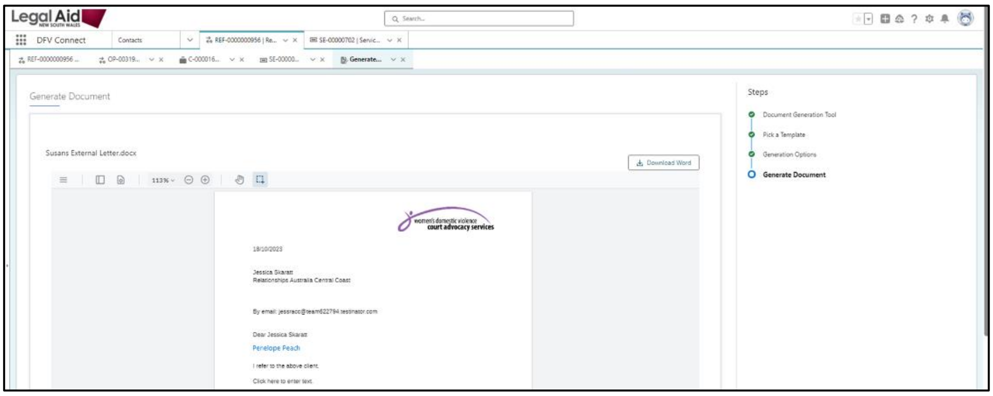
c. When completing external referrals ensure you include your generic WDVCAS email so that responses will be received even if you are on leave.

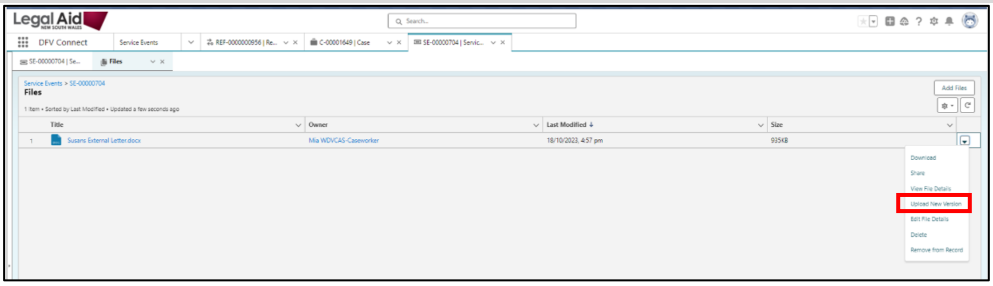
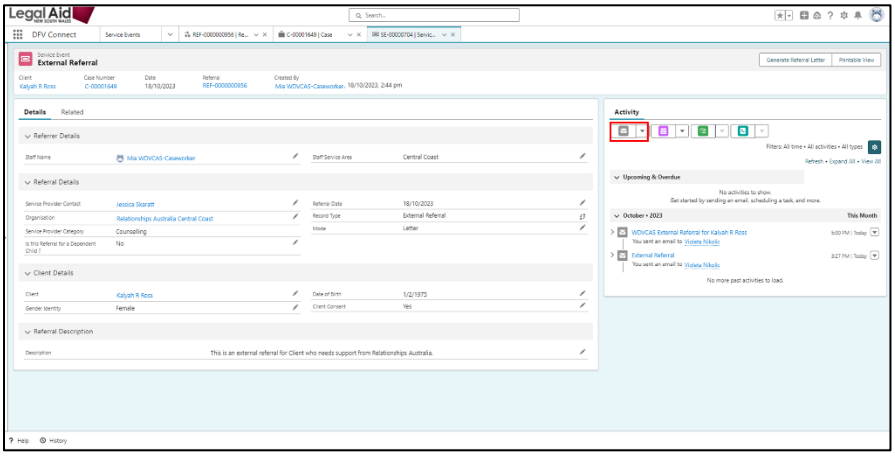
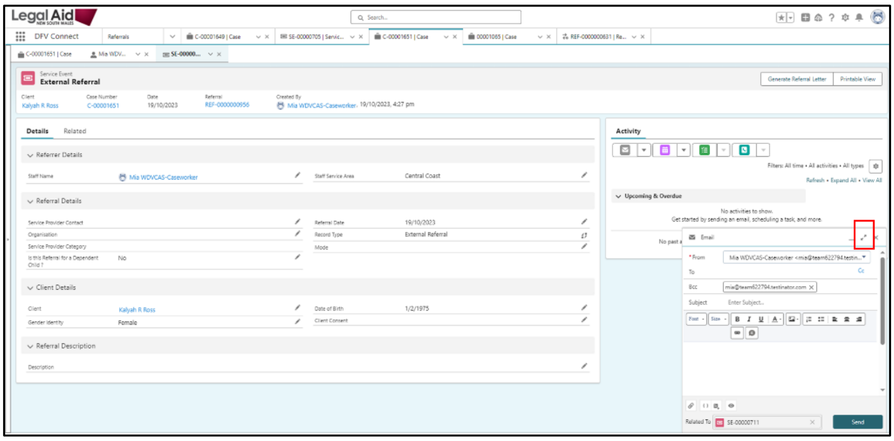
Use these instructions to refer the client to another external Service Provider:

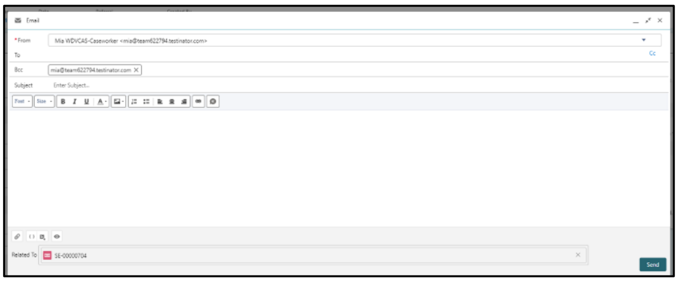
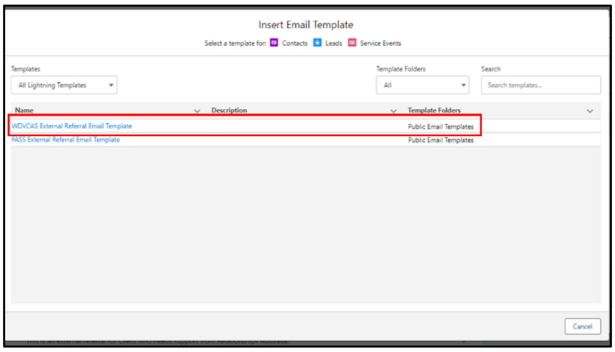
Step	Description
1.	From the Case record, click on **External Referral** in the quick action bar (top menu). 
2.	The *External Referral* pop-up screen will be displayed. Select if this **Referral is for a Dependent Child** (Y/N). Click **Save** 
3.	The *Service Event "SE-00000xxx" was created* pop-up will appear on top of the screen. Click on the SE-000 number on this pop-up to navigate to the Service Event

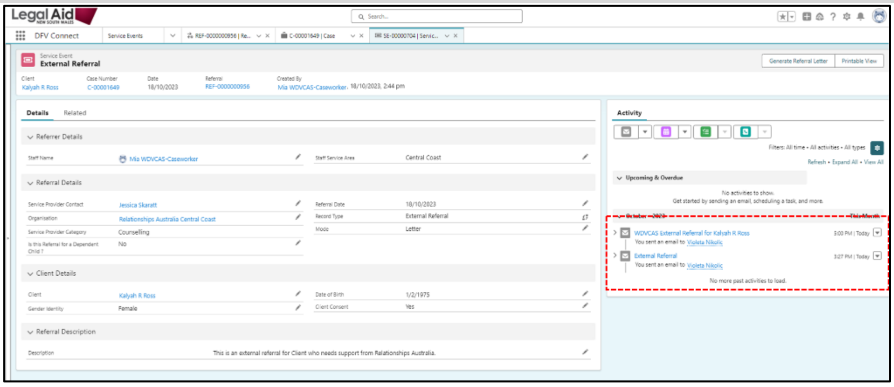
Step	Description
	Alternatively, if the pop-up disappears before you click on it, you can click on the SE-000 number in the **Feed** on the right-hand side, or you can access it form the **Case Related** tab, under the Service Events area. 
4.	The Service Event will open. Click a pencil icon to edit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

Step	Description
	
6.	The information recorded on the service event (including contact, external provider account and email) will automatically populate onto the letter (If your CAS prefers sending referral letters). Select **Generate Referral Letter** button. 
7.	The *Document Generation Tool* screen will be displayed. Click on **Generate Document** 
8.	The Pick a Template screen will display. Select the **WDVCAS External Referral Letter** and select the **Next** button.

Step	Description
	
9.	The *Generation Options* screen will display. Select the **Downloaded File Format** (Word or PDF). Provide a **Document Title.** Click **Next** 
10.	The Document will be generated. If you need to make any changes you can select the **Download Word** option. 
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**.** 
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**.

Step	Description
	
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. 
15.	The email window will be displayed in the bottom right corner. To expand the window, click on the “maximise” arrows. 

Step	Description
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 WDVCAS 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. 
19.	The details that the email was sent will appear on the Activity timeline.

Step	Description
	
20.	The provider will receive the email from noreply@salesforce.com on behalf of the user. 

Safety planning

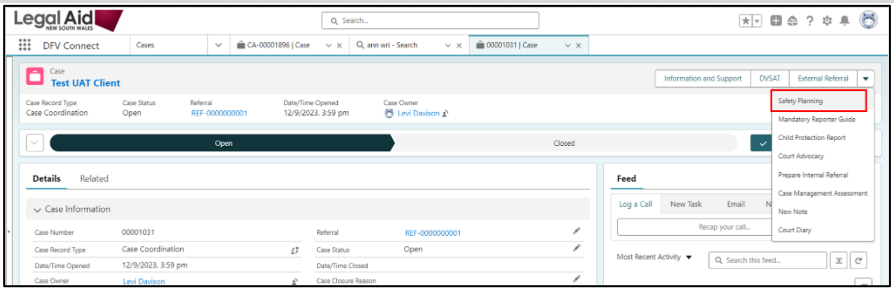
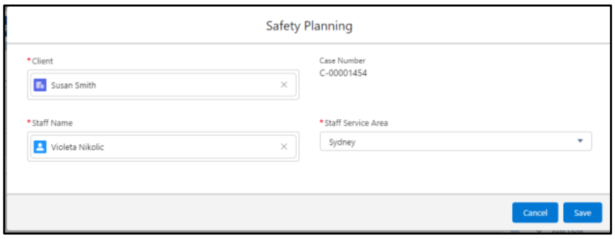
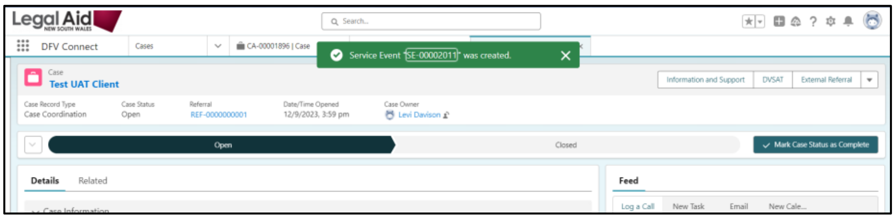
WDVCASs should seek to address clients' immediate safety needs when speaking with them. DFV Connect has a service event titled safety planning which includes a checklist that can be used to help guide your conversation and remind you of some critical discussion points. Safety Planning can be completed at any time whilst working with the client.

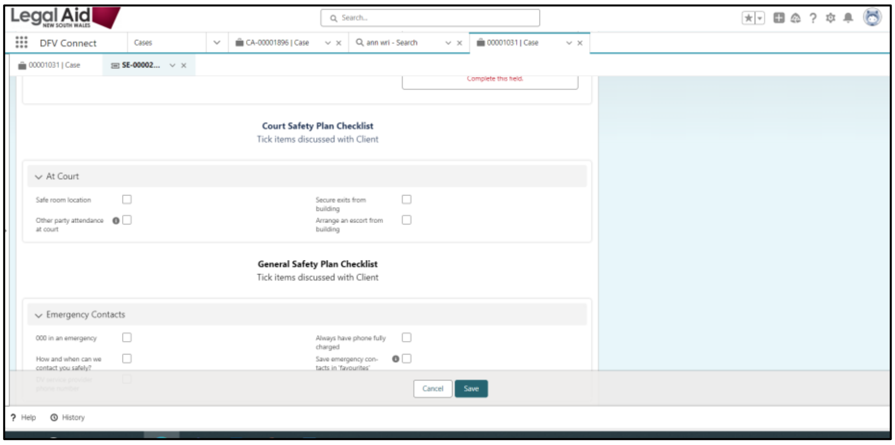
Case availability

Service event	Case coordination	Case management	SAM case
Safety planning	✓	✓	✓

Process steps

Step	Description
1.	From the Case, click on **Safety Planning** in the quick action bar (top menu).

Step	Description
	
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. 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**.

Step	Description
	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. 

Mandatory reporter guide (MRG)

WDVCAS workers are mandatory reporters. Mandatory reporters are required by law to report suspected child abuse and neglect to government authorities.

Mandatory reporting is regulated by the Children and Young Persons (Care and Protection) Act (1998) and mandatory reporters should refer to the NSW Mandatory Reporter Guide (MRG)

If a WDVCAS worker has concerns for the safety, welfare or wellbeing of a child or young person, the worker should use the MRG, regardless of whether a report has already been made by the NSW Police Force or another agency. DCJ Child Protection recommends that mandatory reporters complete the MRG on each occasion they have risk concerns, regardless of their level of experience or expertise. Each circumstance is different, and every child and young person is unique.

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

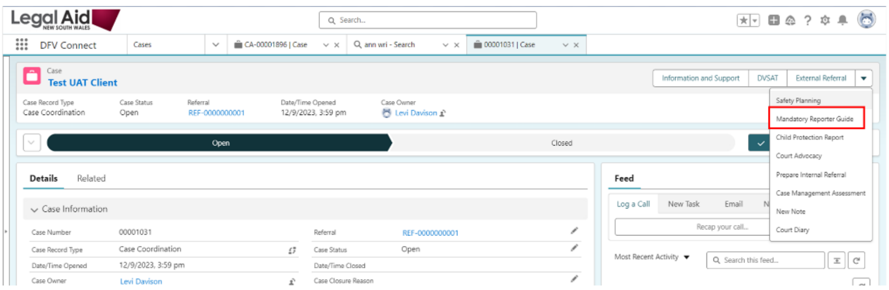
Visit the Child Story Reporter website for more guidance regarding use of the MRG.

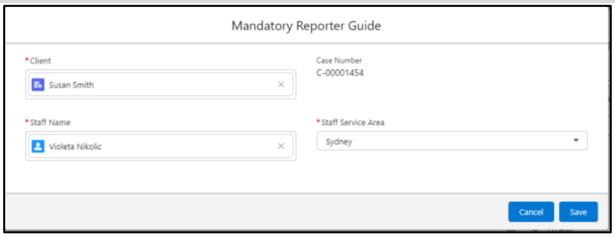
Case availability

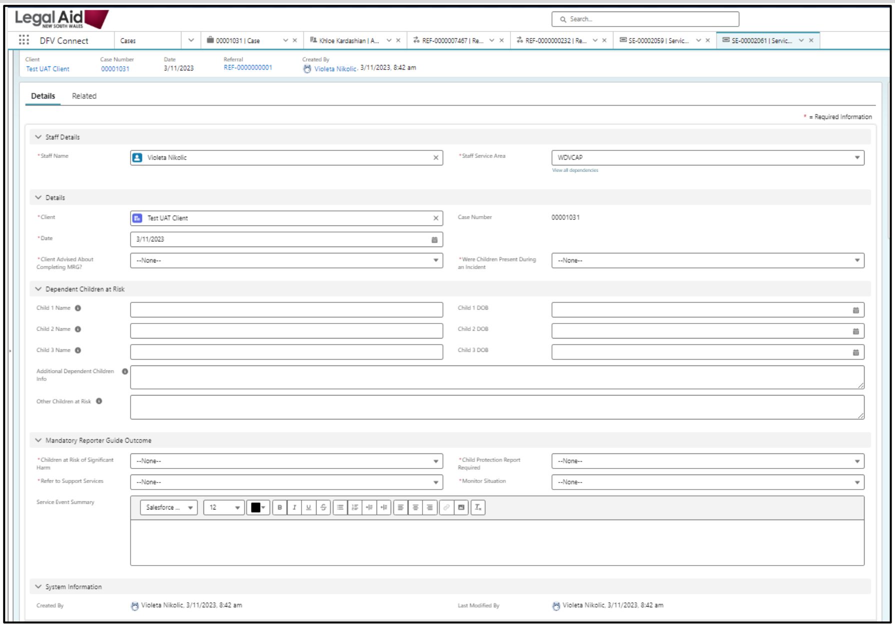
Service event	Case coordination	Case management	SAM case
MRG	✓	✓	✓

Practice rules

a. Complete the online MRG via ChildStory as normal, record actions in this service event to reflect work & outcome of MRG
b. If needed discuss the outcome of the MRG or decision not to report with your Manager.

<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>
</table>

Step	Description
	
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 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** • **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**

Step	Description
	
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.

Make a child protection report

In cases involving a child or young person, WDVCASs may share information under Chapter 16A of the Children and Young Persons (Care and Protection) Act 1998 (Visit the DCJ webpage, Protecting Our Kids' for more guidance regarding child protection).

WDVCAS workers are mandatory reporters. Mandatory reporters are required by law to report suspected child abuse and neglect to government authorities.

Entering child protection reports is critical in adhering to WDVCAS obligations and responsibilities as mandatory reporters. If you do not make a child protection report after completing an assessment, it is important that you record the reasons for this.

Please note that you still need to make reports even if you believe another agency has made a report.

Case availability

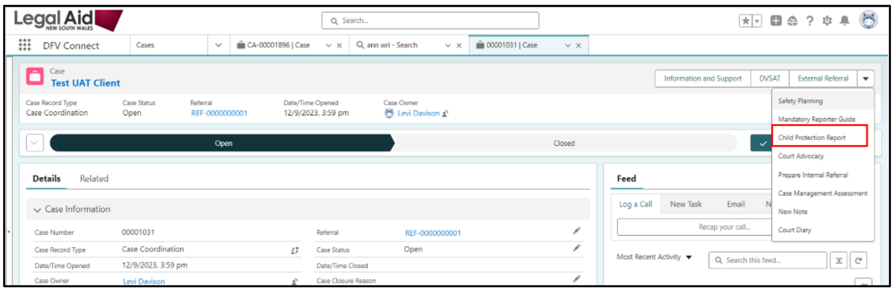
Service event	Case coordination	Case management	SAM case
Child protection report	✓	✓	✓

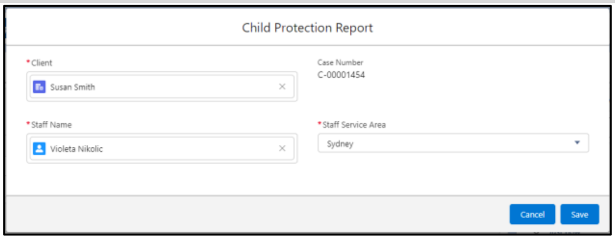
Practice rules

a. Reports to the DCJ-Child Protection should be made in consultation with the client wherever possible and when it is safe to do so.

b. Upload a copy of the child protection report in the service event

c. Record the child protection report outcome at a later date once received

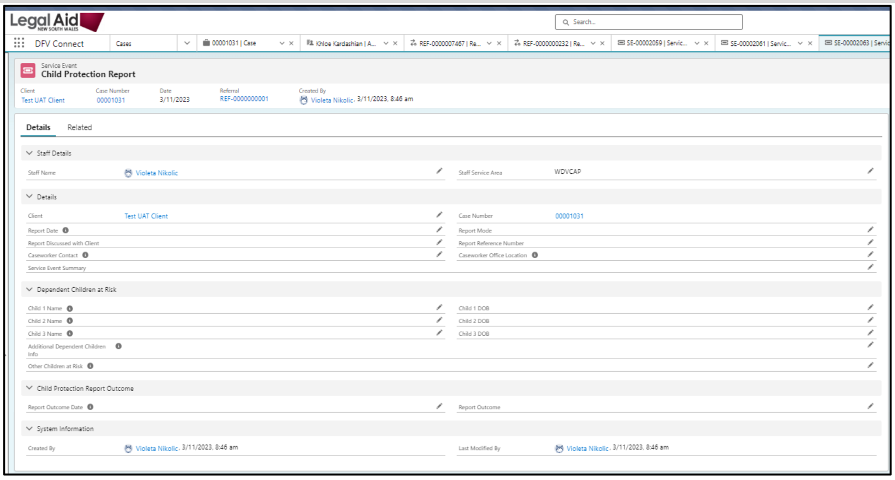
Step	Description
1.	From the Case, click on **Child Protection Report** in the quick action bar (top menu). 
2.	The *Child Protection Report* pop-up screen will be displayed. The Client, Case Number, Staff Name (you) and the Staff Service area (your location) will be pre-populated. Click **Save.**

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

Step	Description
	
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

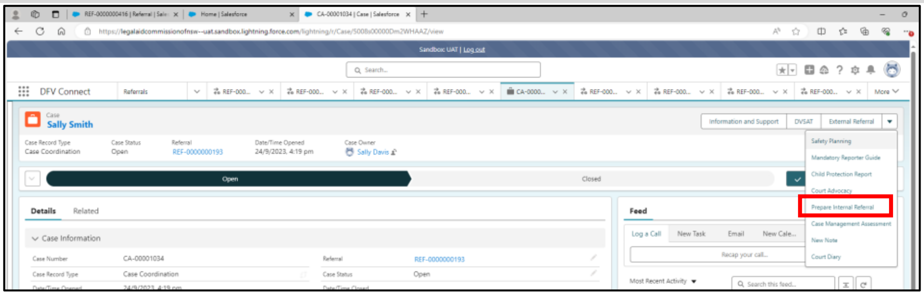
The **Prepare internal referral** service event can be used to send a referral to another provider within the DFV Connect system. When sending a referral to another provider within the same funding program (between WDVCAS' or between FASS Women), the Client Account will be shared (e.g. referring from one WDVCAS to another WDVCAS). However, if an internal referral is sent to different Funding Program, i.e., from a WDVCAS to FASS, the Client Account will not be shared, only information you've placed in the Internal Referral form will be visible for the other funding program office.

Practice Rule

- **If a Serious Threat referral needs to be listed on another Location for SAM purposes, you must NOT send it as an Internal referral. These referrals must be reallocated.**

Process steps

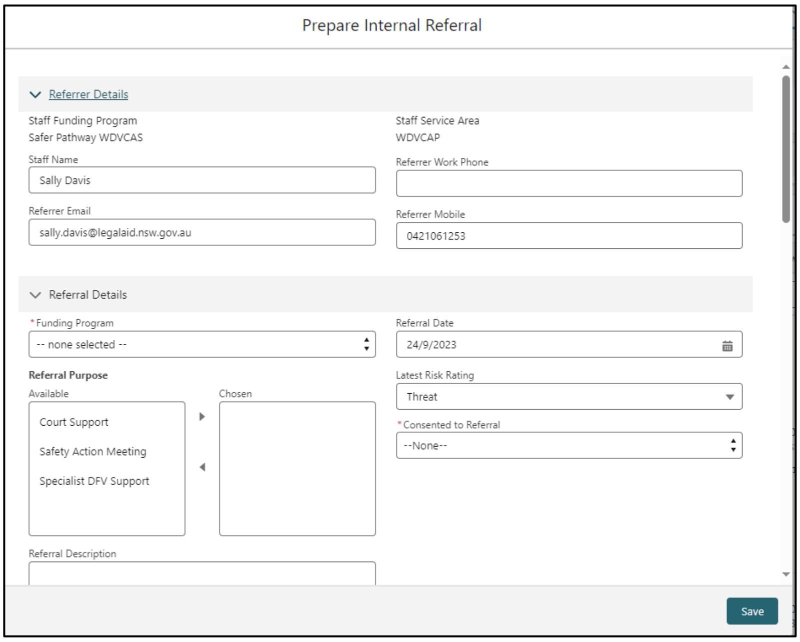
Step	Description
1.	From the Case, click on **Prepare Internal Referral** in the quick action bar (top menu).

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

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

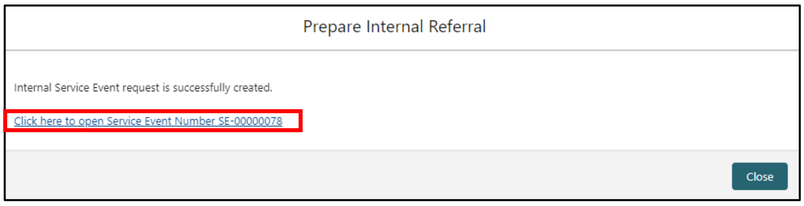
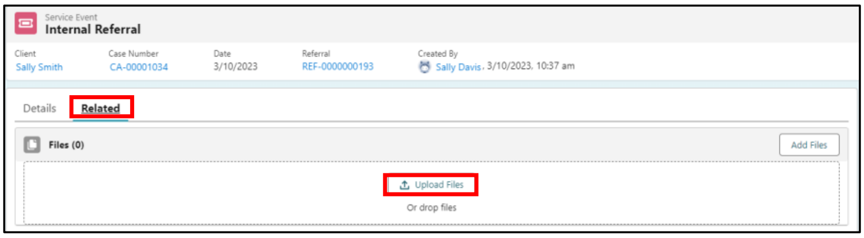
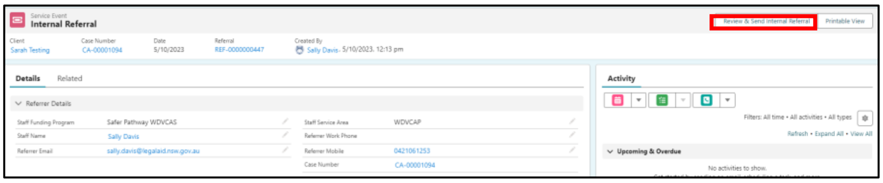
The *Internal Referral* pop-up screen will be displayed. This form displays information from the original referral as well as the client person record. Enter information for:

- **Referrer Details** – Staff Funding Program, Staff Service Area, Staff Name and Referrer Work Phone, Email and Mobile will be pre-entered if they are on record.
- **Referral Details** – Select the **Funding Program**, new **Service Area** and new **Location** to receive the referral, and **Consented to Referral** (mandatory fields), Referral Date, Latest Risk Rating, Referral Purpose and Referral Description
- **Client Details** – data in client details will be pre-populated, however you have the ability to add additional details that may be useful – Gender Identity, Contact Note
- **Client Demographics** - Aboriginal, Torres Strait Islander, Country of Birth, Temporary Visa, Culturally and Linguistically Diverse, Primary Language, Interpreter Required, Interpreter Language Required (mandatory if they require an interpreter), LGBTQIA+, LGBTQIA+ classification, Disability, Disability Details
- **Additional Referral Details** – Indicate if the referral related to Sexual Assault, or Homicide, Child Protection Concerns or Dependent Child Information.

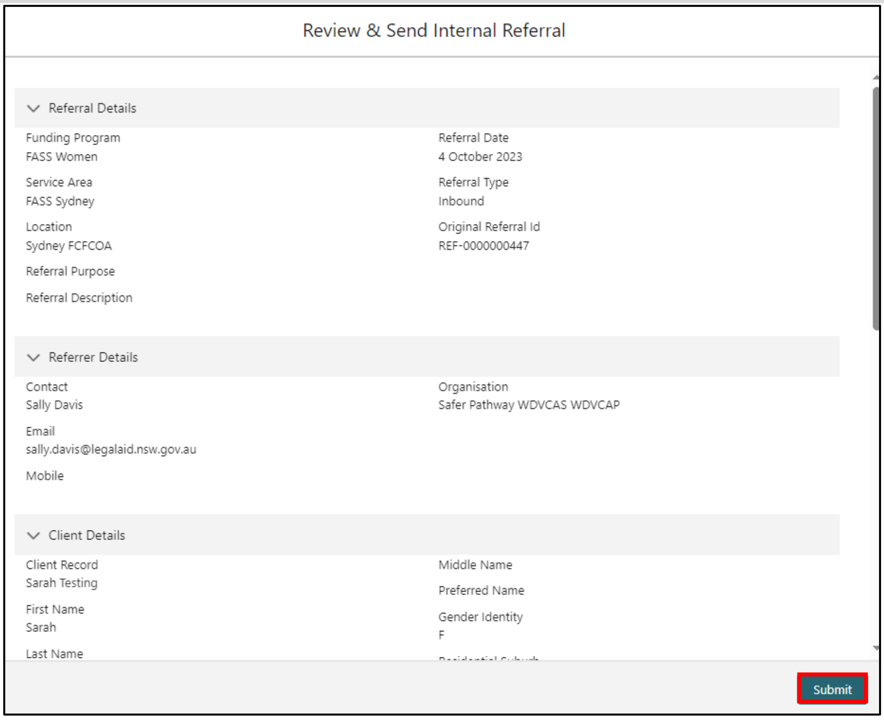
Once all fields are completed, select the **Save** button.



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

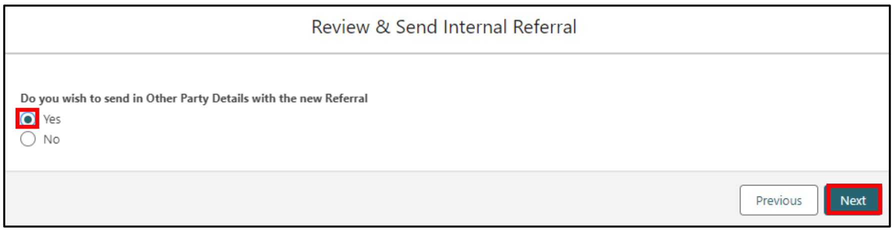
Step	Description
3.	Click on the Service Event link to open it 
4.	The *Service Event* screen will display If required, click on the **Related Tab** and **Upload Files** that may assist the provider. 
5.	When ready, click Review and Send Internal Referral 
6.	The *Review & Send Internal Referral* screen will display Confirm the details are correct then click **Submit**

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



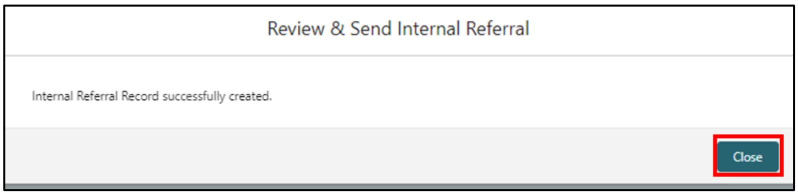
</td></tr>
<tr><td>7.</td><td>

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**.



</td></tr>
<tr><td>8.</td><td>

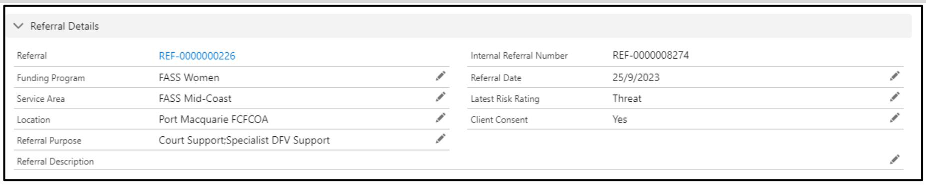
You will receive notification the internal referral has been successfully created, **close** to be taken back to the internal referral service event.



</td></tr>
<tr><td>9.</td><td>

Once submitted, the **referral number** field on the internal referral service event will populate with the internal referral number created and the **Prepare Internal Referral** quick-action button will be removed.

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

Step	Description
	

Court advocacy

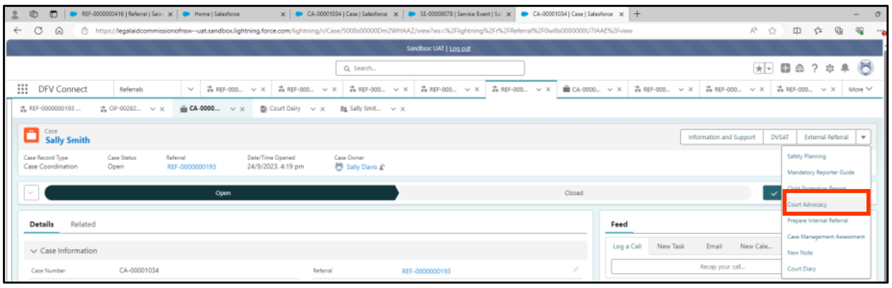
WDVCASs provide advocacy to women going through the court process in relation to domestic and family violence matters. In particular, WDVCASs help women obtain legal protection through Apprehended Domestic Violence Orders (ADVOs), tailored to meet the client's individual needs.

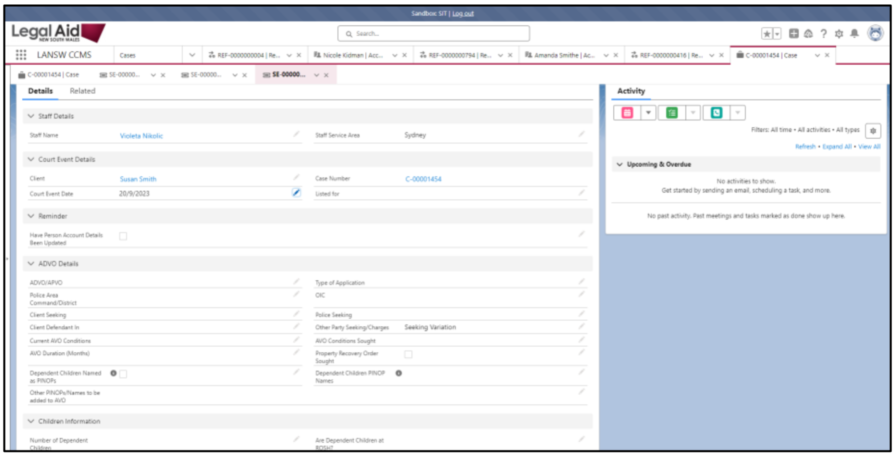
In DFV Connect, you can record all your court advocacy services using:

1. **Court advocacy service event:** used for at-court services provided
2. **Court diary:** record client's court matters and related court events (listings) and outcomes including any orders made

Case availability

Service event	Case coordination	Case management	SAM case
Court advocacy	✓	✓	

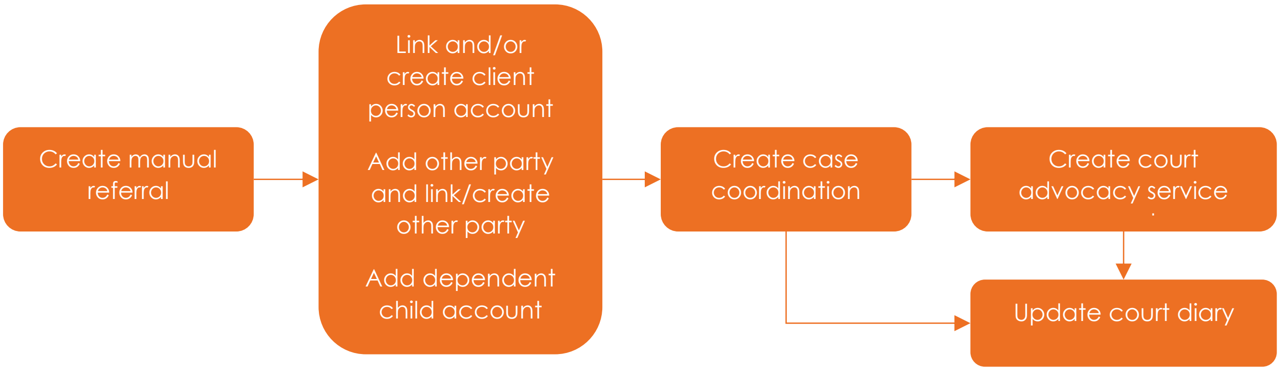
Step	Description
1.	From the Case, click on **Court Advocacy** in the quick action bar (top menu). 
2.	The *Court Advocacy* pop-up screen will be displayed. The Client, Case Number, Staff Name (you) and the Staff Service area (your location) will be pre-populated. Click **Save.** 
3.	The *Service Event "SE-00000xxx" was created* pop-up will 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.

Step	Description
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. • **Court Event Details** – enter Court Event date and what the matter is listed for (Mention or Hearing) • **Reminder** - tick box to confirm that you have updated the Person Account details • **ADVO Details** – Type (ADVO/APVO, Private/Police application), Police Area Command/District, what is client/Police seeking (Advice, withdrawal, order variation revoke/annulment), Other Party Seeking/Charges, AVO Conditions, duration, Dependent Children… • **Children Information** – number of children, are children on ROSH, is DCJ involves, children details • **Client History and Background** – DFV Experience and Background Details • **Domestic Violence Duty Scheme** – DVDS Solicitor Present, DVDS Details and contact with client. You can upload a copy of the WDVCAS DVDS form if required. • **Referral Information** – Referrals/Information provided at Court • **Additional Information** – Service Event Summary Click **Save** 
5.	You can access the Service Event at any time from the **Related** tab of a **Case** record. The Case **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.

Court advocacy for new clients

To assist clients you have met at court for the first time, you can create a manual referral for these clients and use the court advocacy service event in DFV Connect. If your internet is slow, or you prefer to record information by hand, there is a court support template you can use.

The process for assisting new clients at court is to create a manual referral and link to a client person account, create a case and court advocacy service event.



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 at the Prosecutor Pre-Hearing Clinic.

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

Access Court Diary → Add court matter → Add future or current court event → Record court outcomes

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 the Prosecutor clinic and Practice Note/Compliance directions.
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 (e.g., ADVO or APVO).
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., the defendants bail status, sentence outcome and warrant issued.
d. The Court Dairy only has the function to be able to record the court location/s to your Service Area (i.e., WDVCAS). 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 listed at a court location outside your Service Area, 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, including Prosecutor Pre-Hearing Clinics 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 fo 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.

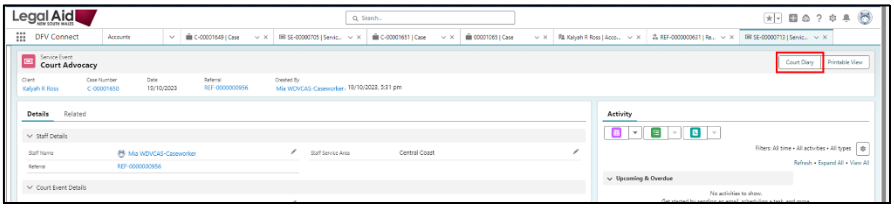
Example scenarios:

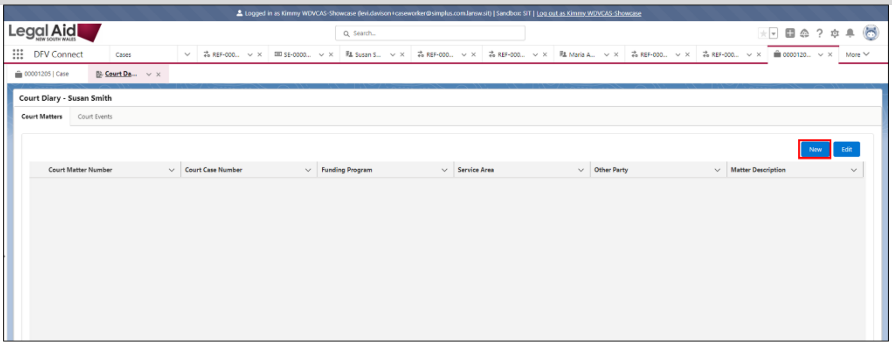
- Macarthur WDVCAS is assisting their client via AVL from their office or local court to attend a court mention/hearing at another local court outside of their service area- In this example the client is not being referred to Hunter Valley WDVCAS for the Hearing because the client is not attending Maitland Court in person but is attending via AVL from Macarthur WDVCAS. Macarthur WDVCAS can record this by-

a. 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 Macarthur WDVCAS office, matter listed at Maitland Court for Hearing.
b. Court Diary - use Matter Description to explain again
c. Court Event - choose 'none' for court location, you can also choose - client attended court & supported. In the notes section state via AVL from Macarthur WDVCAS for Maitland Court.

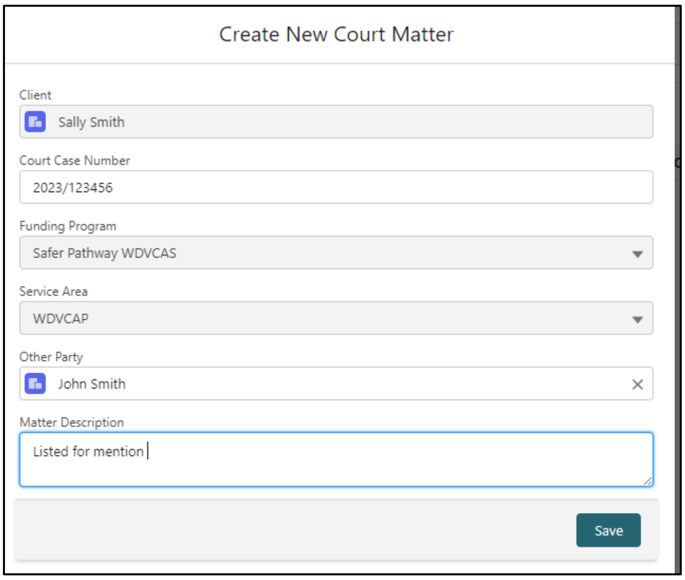
In this example the client was not referred to Hunter Valley WDVCAS for court support and the client remains working with Macarthur WDVCAS.

- Southern Sydney WDVCAS has a client who has a court matter listed at Nowra Court, you can internally refer the client to be supported by the WDVCAS who services this local court, South Coast WDVCAS. This avoids the client from having to retell their story again and this WDVCAS can make contact to connect & offer support while the client is attending their local court. In this example South Coast WDVCAS would the 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. South Coast WDVCAS can communicate with the client and Southern Sydney WDVCAS re the court outcome. This client would effectively have the support of both WDVCASs, Southern Sydney WDVCAS for case coordination & South Coast WDVCAS for Court.

Step	Description
1.	From the Person Account, or Case, or Court Advocacy service event, click on **Court Diary** in the quick action bar (top menu). Note: screenshot below displays creation of Court Diary from Court Advocacy service events. 
2.	The *Court Diary* screen will display. To add a Court Matter click on the **New** button.

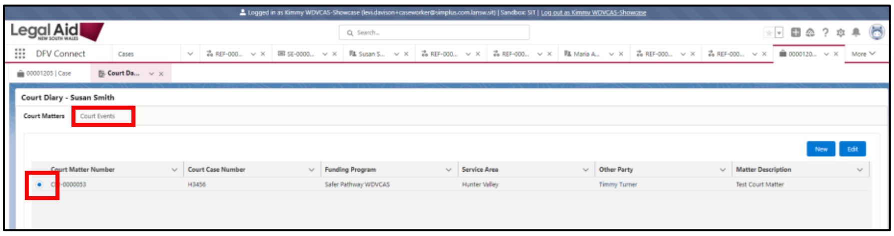
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>


</td></tr>
<tr><td>3.</td><td>
The Create New Court Matter screen will be displayed. Funding Program and the Service Area will be pre-populated, complete the other required fields Court Case Number, Other Party, Matter Description - free text notes about the client’s court matter including whether it is an ADVO/APVO matter, charges etc Click Save.

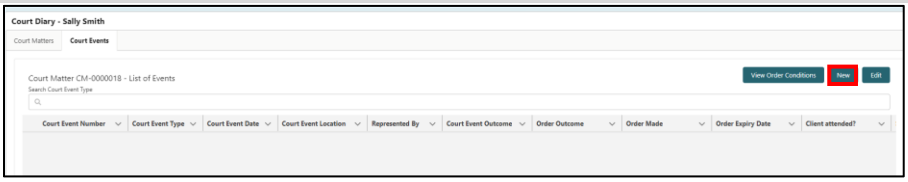


</td></tr>
<tr><td>4.</td><td>
The Court Matter will be created and displayed.

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>
</table>

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


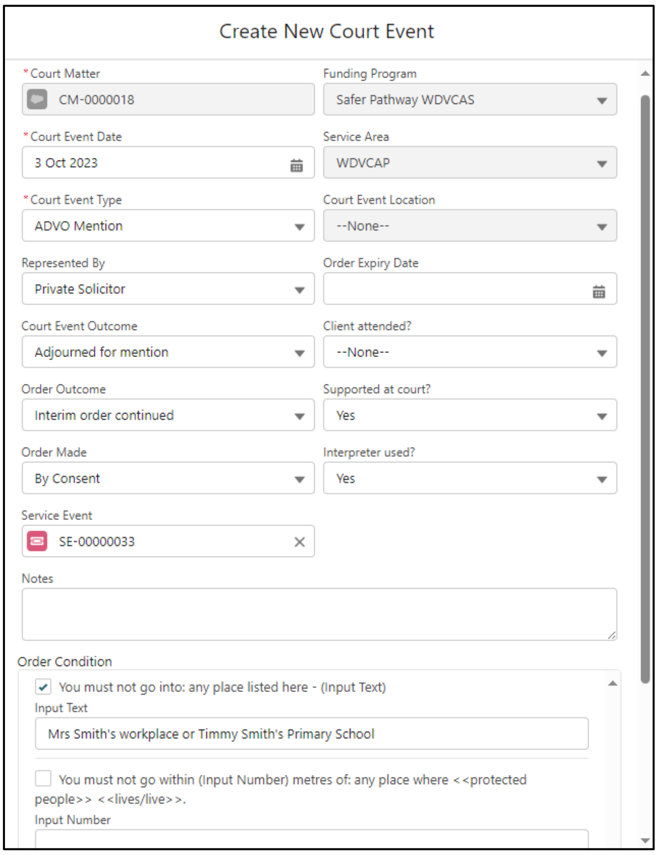
</td></tr>
<tr><td>6.</td><td>

The Create New Court Event screen will display.

Enter the Court Event Date, Court Event Type. Court Event Location, Represented By, Order Expiry Date, Court Event Outcome, Client attended? Order outcome, supported at court? Order Made, and Interpreter used?

In the Service Event field, select the Court Advocacy Service event (if support was provided, else leave blank). Enter any Notes.

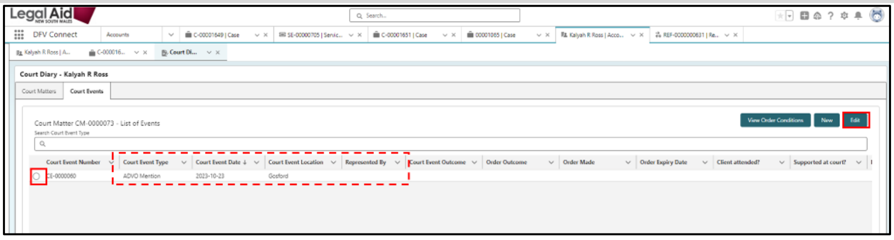
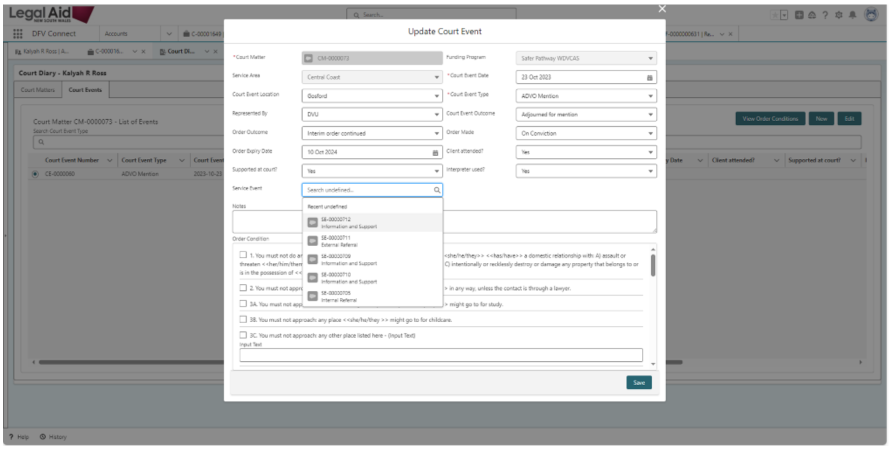
In the Order Condition section, select the relevant checkboxes in line with the AVO. Where relevant, enter the Input Text. Click Save

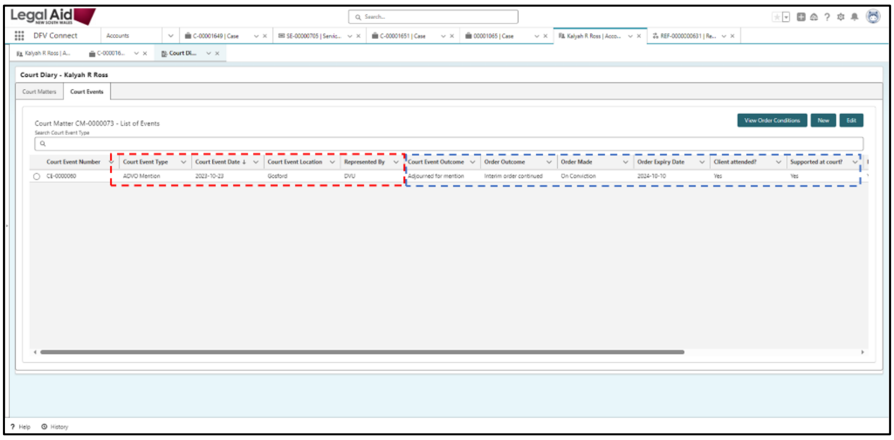


</td></tr>
<tr><td>7.</td><td>

Note that the court event is now saved and the left-hand 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 and information about orders made. To record the court outcome, select the circle button of the court event and click on edit.
</td></tr>
</table>

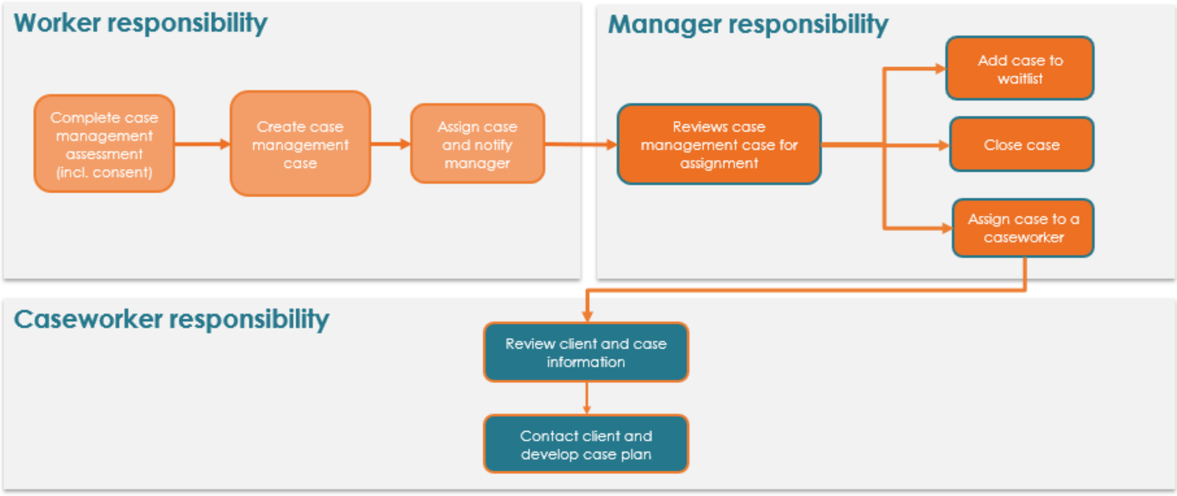
Step	Description
	
8.	You can enter relevant court outcomes and information about relevant orders made. • It is important that you select whether the client attended, was supported or an interpreter used • In the **notes** section you can record information about the client's bail status, sentence outcome and warrant issued • There is also an option to add the court advocacy service event to the court event so you can easily access information about what happened specifically on that court event date When all information is entered click on the **Save** button. 
9.	Note that the details of the court event are now complete after we entered the outcome. 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.

Step	Description
	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. 
10.	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. For example, you can record the variation of the AVO as one event, and the adjournment to hearing as another event. • To view the AVO conditions, click on the radio button of the Court Event, then click View Order Conditions. • To edit the Court Event, click on the radio button of the Court Event, then click Edit.

Refer client for casework

In DFV Connect, In DFV connect, casework referral and intake involves:

- Workers will complete a case management assessment, create a case management case and allocate it to the WDVCAS manager so they can assign accordingly.
- The **manager or assistant manager** will then triage these cases by reviewing the case and service event and assign to a caseworker, add the client to a waitlist or decline the referral if it is not appropriate for casework
- When the caseworker receives a case management case, they should review the case and case management case and contact the client to provide support and develop a case plan.



Case management assessment

All WDVCAS casework clients must be WDVCAS clients – caseworkers cannot receive referrals from external services or agencies.

In DFV connect, casework referral and intake involves:

1. Completing a case management assessment and
2. Creating a case management case
3. Assigning the case to their WDVCAS manager so they can assign accordingly (assign to caseworker, put on waitlist or close where necessary).

Case availability

Service event	Case coordination	Case management	SAM case
Case management assessment	✓		

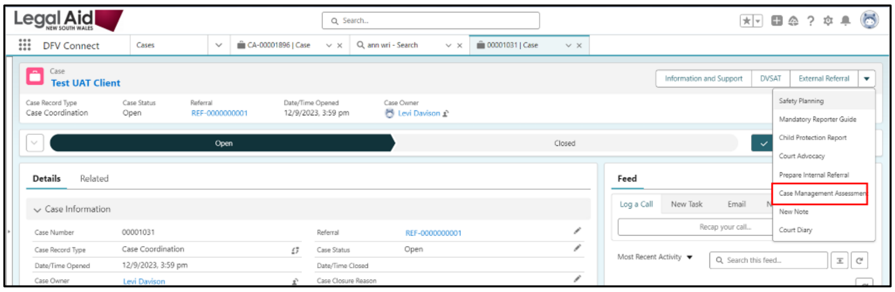
Casework eligibility criteria

WDVCAS caseworkers provide case management services to **WDVCAS clients** who:

- Have been assessed as having complex and serious needs
- Are not able to be referred to another case management service in the area
- Consent to being referred into case management

Practice rules

- WDVCAS workers are responsible for maintaining contact with the client and providing case coordination as needed while the intake process is occurring (i.e., manager assigning case management case to a caseworker).

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

</td></tr>
<tr><td>2.</td><td>The Case Management Assessment 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

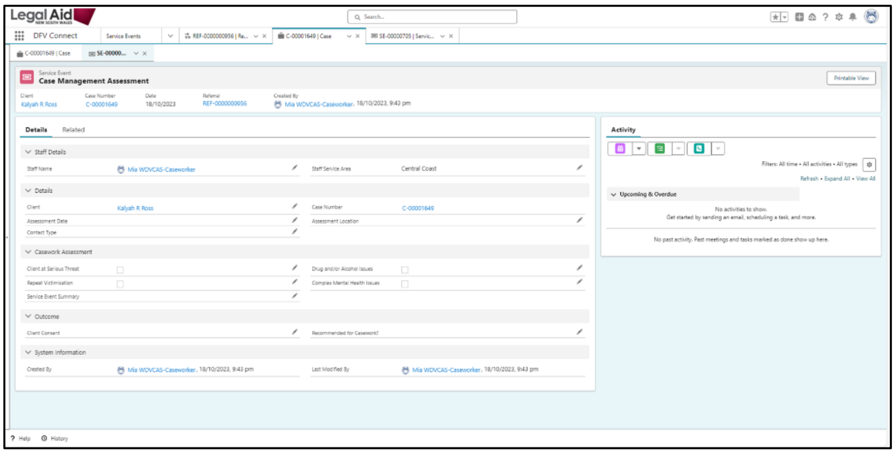
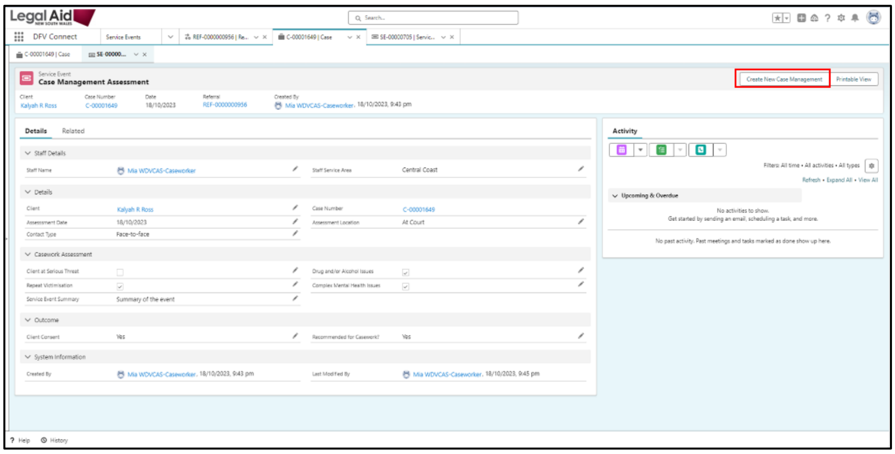
Alternatively, if the pop-up disappears before you click on it, you can click on the SE-000 number in the Feed on the right-hand side, or you can access it form the Case Related tab, under the Service Events area.</td></tr>
<tr><td>4.</td><td>The Service Event will open. Click a pencil icon to edit the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

In the Details section, enter the:

• Assessment Date
• Assessment Location – Home visit, At court, Office or Other
• Contact Type – Face-to-face, Telephone, Letter, Email or SMS

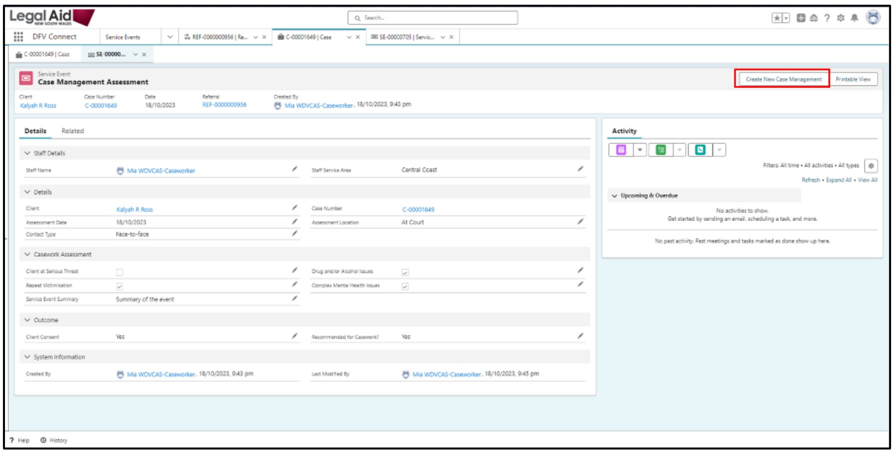
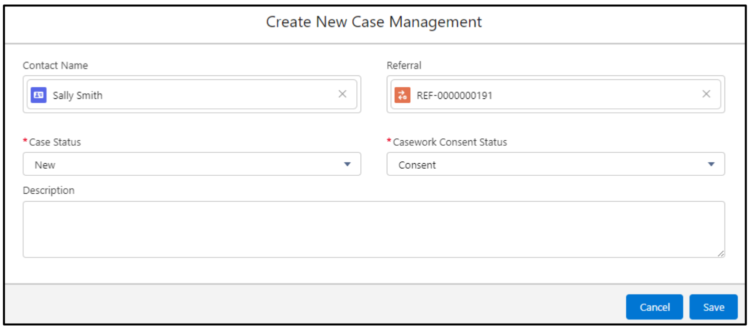
In the Casework Assessment section, select the relevant checkboxes:

• Client at Serious Threat
• Repeat Victimisation
• Drug and/or Alcohol Issues
• Complex Mental Health Issues</td></tr>
</table>

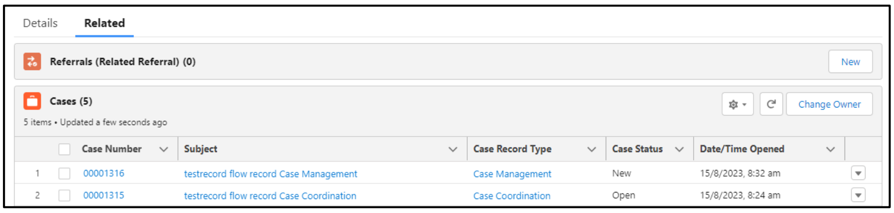
Step	Description
	• Enter a **Service Event Summary** In the **Outcome** section select: • **Client Consent** • **Recommended for Casework**? Click **Save** 
5.	If you select Yes to both Client Consent and Recommended for Casework, the **Create New Case Management** case button will appear. 

Create case management case and assign to manager

Following a Case Management Assessment being assigned to the caseworker via the manager, the caseworker will create a case management case.

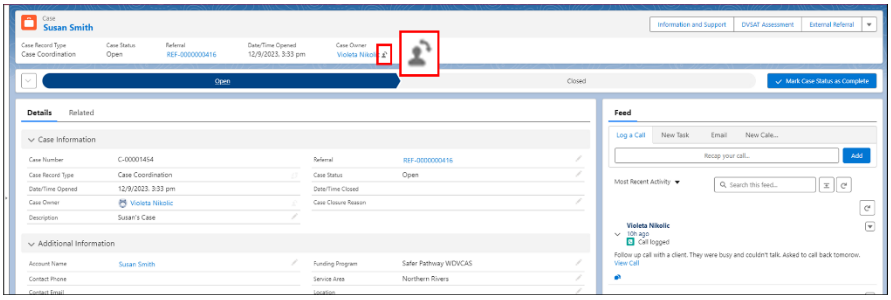
Step	Description
1.	Following completion of Case Management Assessment, the **Create New Case Management** will be displayed. Click on the **Create New Case Management** button. 
NOTE	If the Create New Case Management button isn't available, check that Case Management Assessment was completed and client consent has been obtained and recorded. The referral needs to be in an Active Cases status for this button to be present.
2.	The *Create New Case Management* pop-up screen will be displayed. The Contact Name, Referral, and Case Status will be pre-populated. Select the **Casework Consented Status.** Consent must be obtained. You may also enter a **Description** (optional) and then click on the **Save** button. 
3.	The *Case "CA-00000xxx" was created* pop-up will be displayed. Click on the CA-000 number on this pop-up to navigate to the Case.

Alternatively, if the pop-up disappears before you click on it, from the Referral, Related Tab, under Cases.

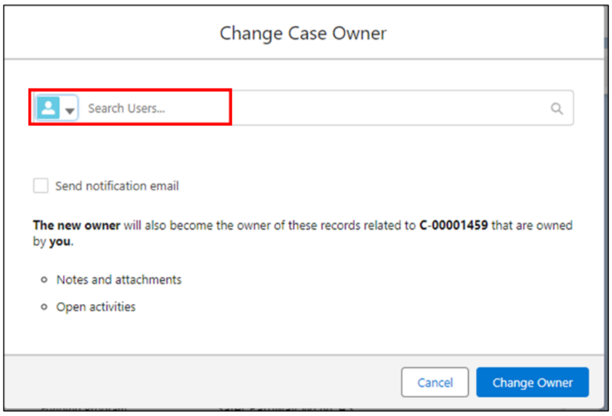


4. Once you create a case management case, next step is to assign it to a CAS Manager so that they can review and assign a case worker, if available, or waitlist if there is no available caseworkers. If required, you may add a note or upload files to the case before.

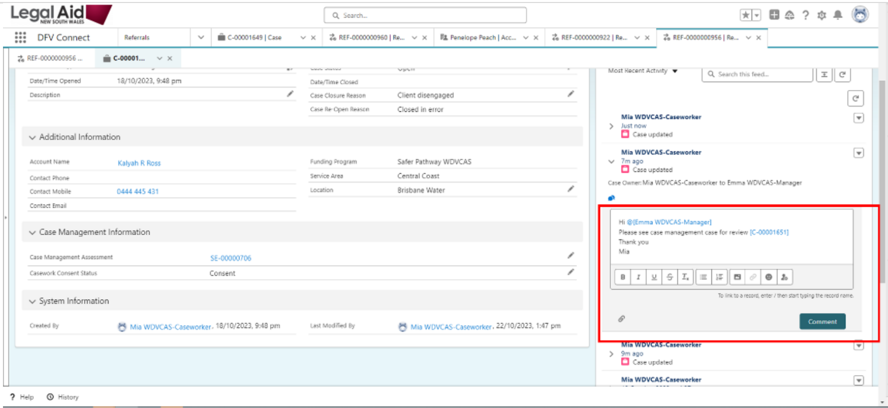
To assign a manager, from the **Case** screen, click on **Case Owner** icon .



5. Start typing the name of the manager to find and select them, then click **Change Owner**. You can tick the Send notification email so the Manager receives and email notification, or you can tag a manager in the comment.



6. You can also add a comment to the case by clicking on the comment thumbnail add @ before the manager's name so the WDVCAS manager receives a notification about the case management case.

	
7.	Managers are to review the cases assigned to them and either: • If there is a caseworker with capacity, assign a case worker • If there is no capacity, add client on a waitlist

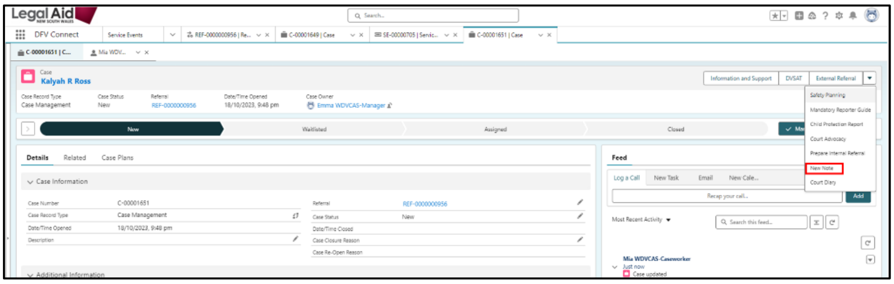
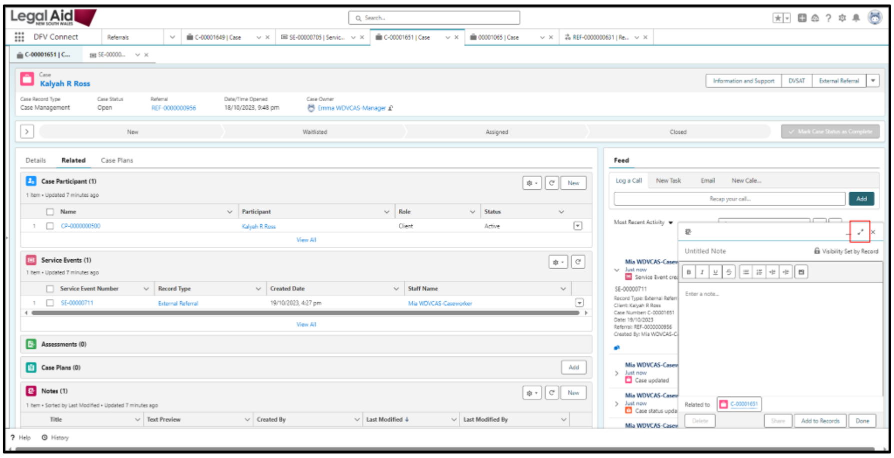
New case note

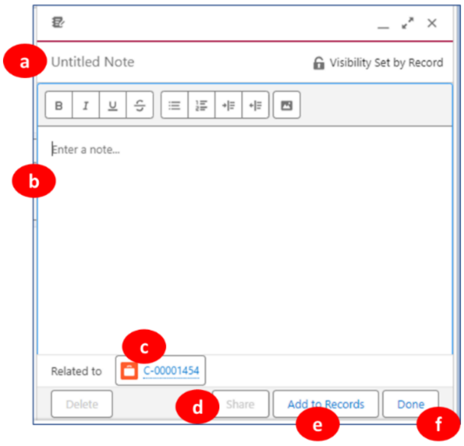
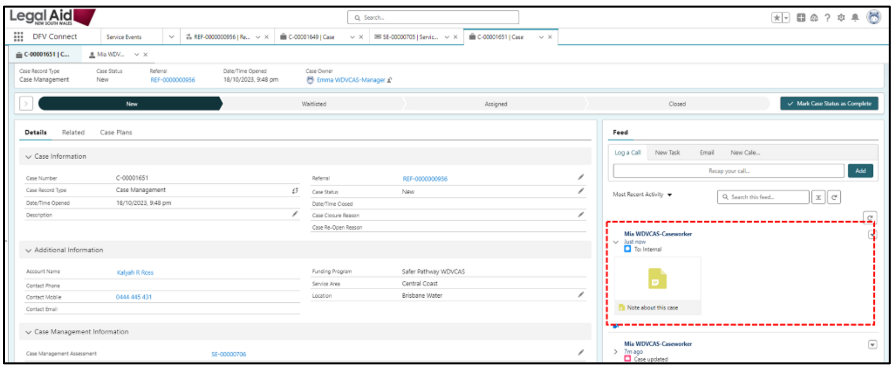
Notes can be created within a case coordination case. Notes should be used to record anything that is not attributed to a service, email or a call.

Practice rules

a. Notes should not be used for client sensitive information e.g., you could use a New Note to advise location of the client file prior to DFV Connect.
b. When naming a note choose a title that accurately reflects the content and purpose of the note, making it easy for anyone reviewing to understand its context and relevance.
c. The Note will be displayed in the Feed (Activity timeline of the case) and is visible across the Funding Program.

Process steps

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

Step	Description
	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. 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. 
	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.

Case management clients

Case management involves developing a person-centred case plan with each client that identifies their key safety issues, needs and goals, and options for addressing these. It also involves engaging with clients regarding their experience of violence to empower them to make safer choices for themselves and their children.

Case management is undertaken within a trauma-informed, strengths-based framework that aims to respect and support clients' autonomy.

Short-term outcomes may be that:

- Clients and families are connected with appropriate services that meet their legal and social welfare needs in a timely manner
- Clients recognise their experience as DFV, understand their options and know where to get help if they need it in the future
- Clients and families have a safety plan and appropriate legal protection in place
- Clients and families have safe accommodation.

Long-term outcomes may be that:

- Clients gain the information and supports needed to stay safe and pursue their goals
- Clients develop the skills to be independent of services.

The overall aim of case management is to help clients and families recover from their experience of DFV physically, emotionally, mentally and practically, and help clients escape the cycle of violence wherever possible.

Please refer to the WDVCAS Case Management Policy.

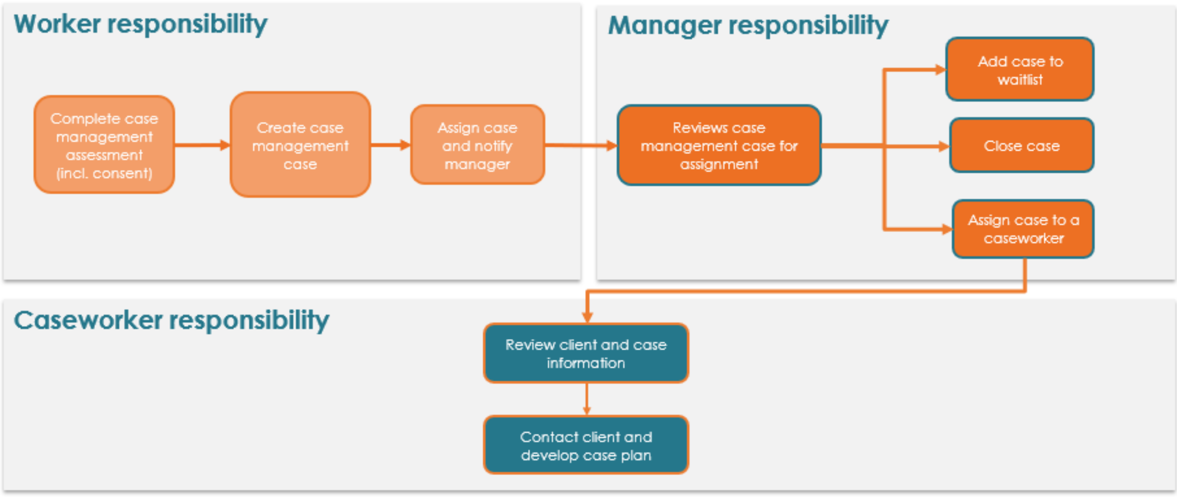
Case management case

Where clients have been assessed as suitable for casework and a case management case has been created (see refer client for casework). The caseworker can use the case management case to record service events, create a case plan and add file notes.

Case management case	
Service events and functions See service events and functions for more information	
DVSAT	Mandatory Reporter Guide
Information and support	Child Protection Report
External referral	Court advocacy
Safety planning	Internal referral
Case note (function)	
Case plan	
Court diary	

Assign to a caseworker

Where a manager has assessed caseworkers' capacity and case management assessment, they can assign a case management case to a caseworker.



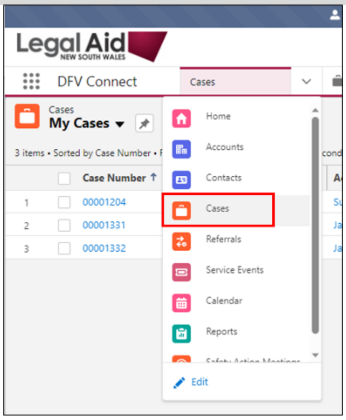
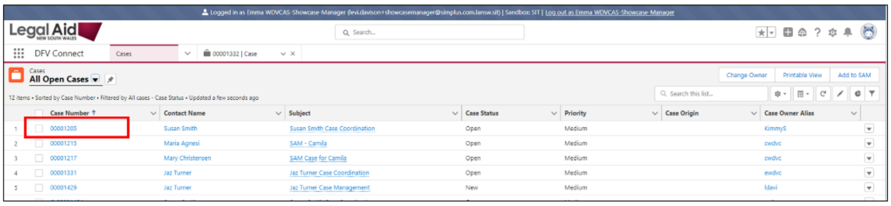
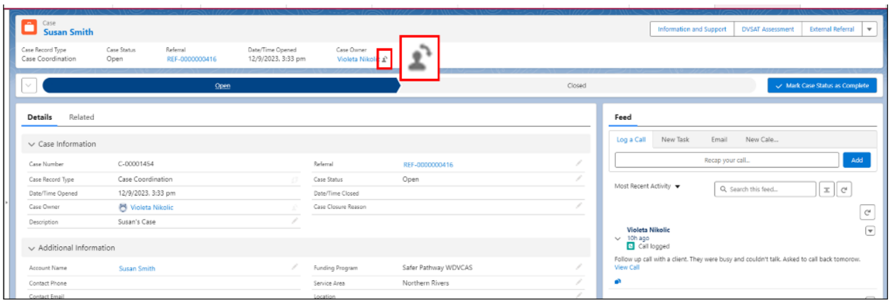
Practice rules

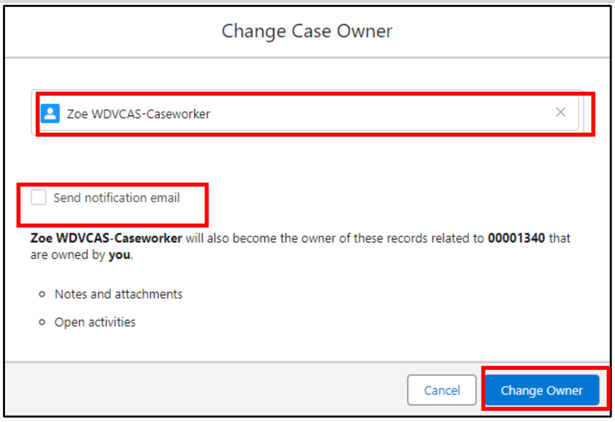
a. A case management case will be assigned to the Manager/team leader for intake, you may receive a notification to alert you. You can access & review the case under the Service Area-Case Management list view.
b. You can also access the case coordination case to see other services provided
c. You can assign the case to a caseworker, waitlist or close the case (see *Close case management case* for details on how to close the case management)
d. Whilst the intake process is occurring, the referring WDVCAS worker is responsible for maintaining contact with the client and providing case coordination as needed.

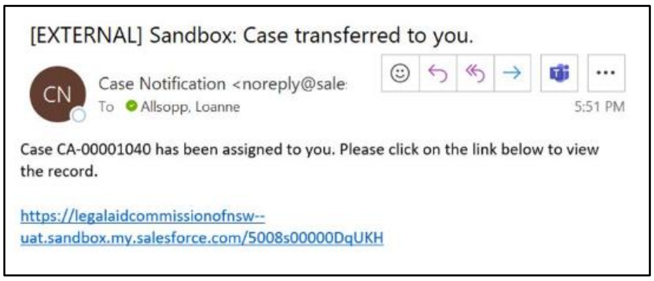
If a client declines to be case managed or you decide the client is unsuitable for case management, you may decide to close the case management case.

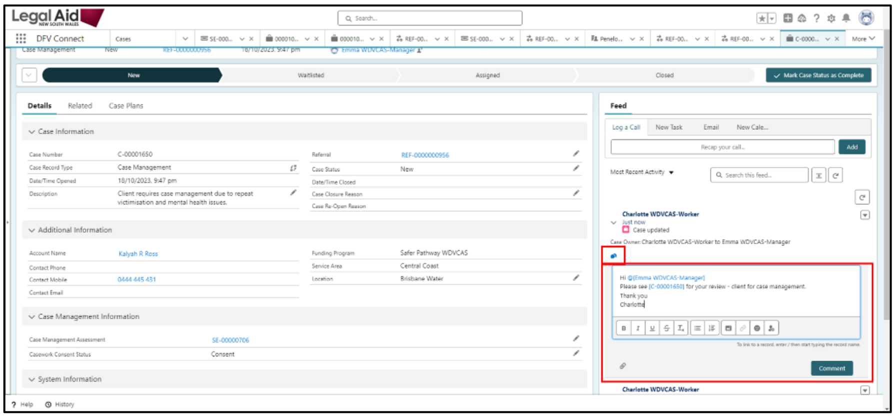
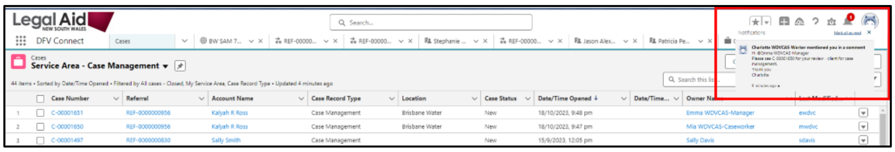
Process Steps

Step	Description
1.	From the Main Menu, Select **Cases**

Step	Description
	
2.	Select the List View **All Open Cases and** click on the relevant Case Number. 
3.	The *Case* is displayed. To assign a manager, from the **Case** screen, click on **Case Owner** icon  . 
4.	The *Change Case Owner* pop-up is displayed. Start typing the name of the manager to find and select them, then click **Change Owner**. If needed, tick the **Send notification email** checkbox, and then select the **Change Owner** button.

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


</td></tr>
<tr><td>5.</td><td>The case worker will receive an email with a direct link to the case.


</td></tr>
<tr><td>6.</td><td>Alternatively, you can comment within the DFV Connect and tag the caseworker to receive notification that the case has been assigned to them. Click on the comment icon to enter details. To tag caseworker and symbol @ in front of their name.

</td></tr>
<tr><td></td><td>Note: When DFV Connect user is tagged in the comment they will receive notification (top-right hand corner next to the bell icon).

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

Assign to waitlist

You would use this option if your team does not have the capacity to accept the case management case immediately. Clients should be waitlisted for a short period only.

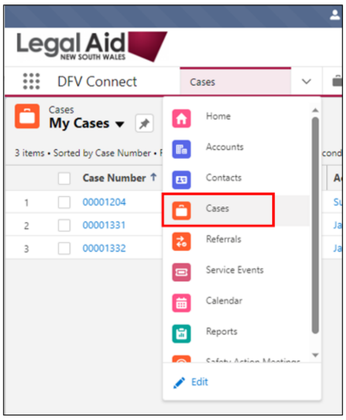
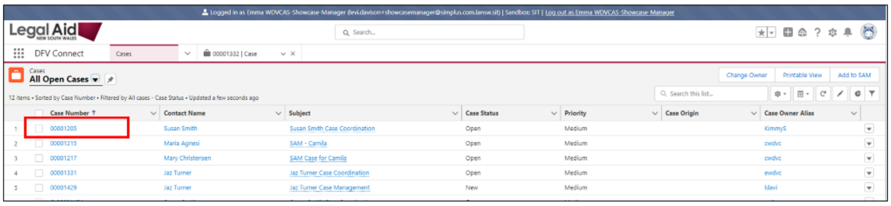
Practice rules

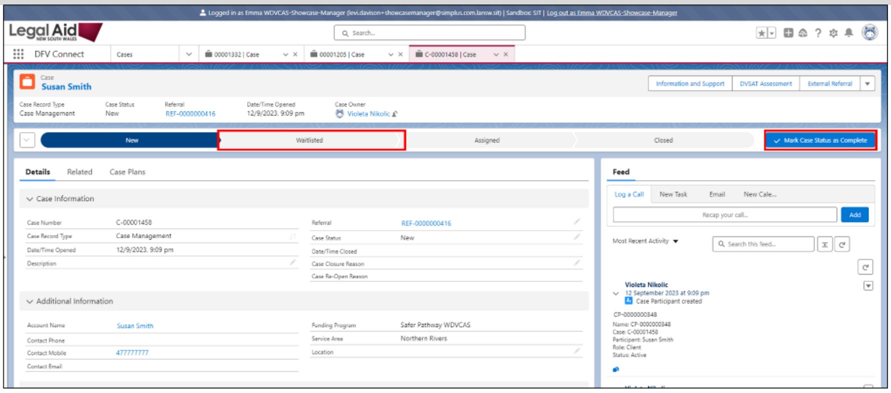
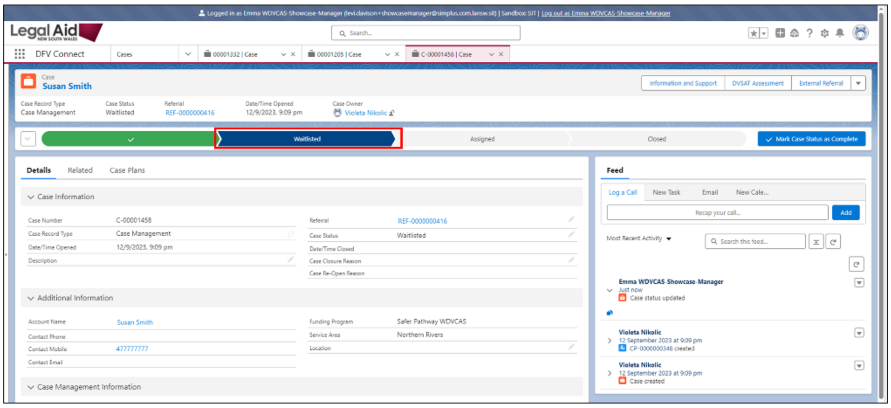
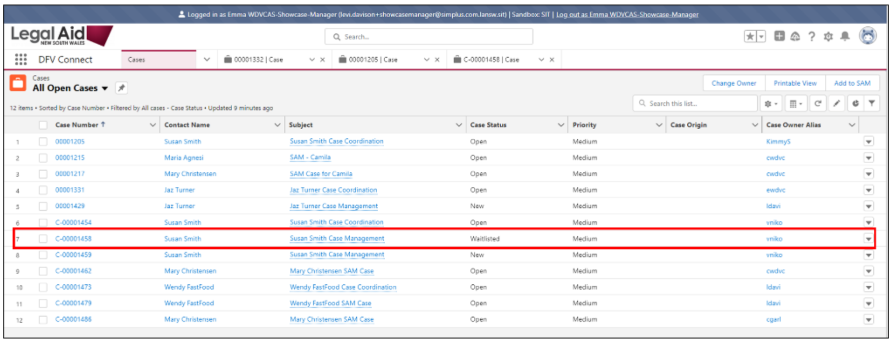
a. Managers should review the waitlist regularly, managing a waitlist can be helped by-

- Overseeing the caseloads of the caseworkers in your team
- Ensuring case plans are reviewed regularly, support caseworkers as they move through a client's case plan and
- Ensuring that clients are effectively exited from case management in a timely manner

Whilst the waitlist process is occurring, the referring WDVCAS worker is responsible for maintaining contact with the client and providing case coordination as needed.

Process steps

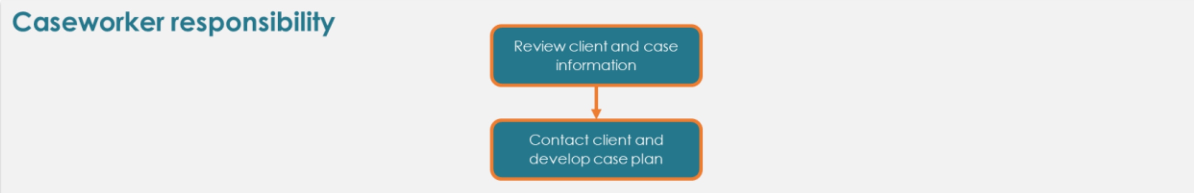
Step	Description
1.	From the Main Menu, Select **Cases** 
2.	Select the List View **All Open Cases and** click on the relevant Case Number. 
3.	The *Case* is displayed. To change the status of the case to Waitlisted, click on the **Waitlisted** status bar on top of the screen and click on the **Mark as Current Case Status** button.

Step	Description
	
4.	The status of the case will change. 
5.	The Manager can now check that the case has a **Waitlisted** status displayed in **All Open Cases** list. 

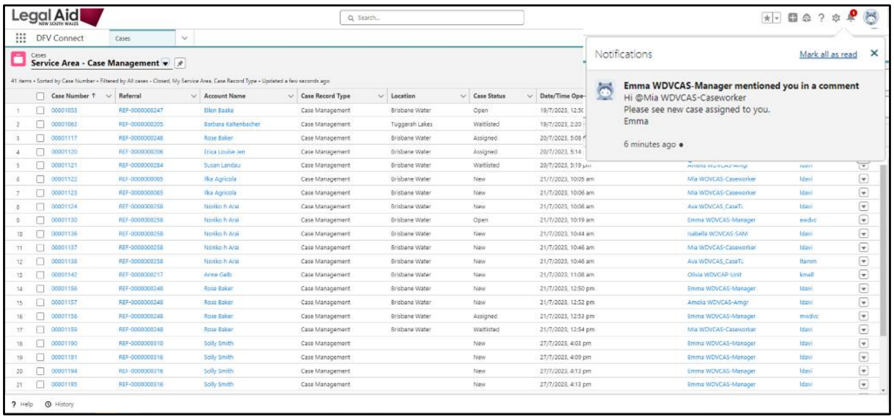
Accessing an assigned case management case

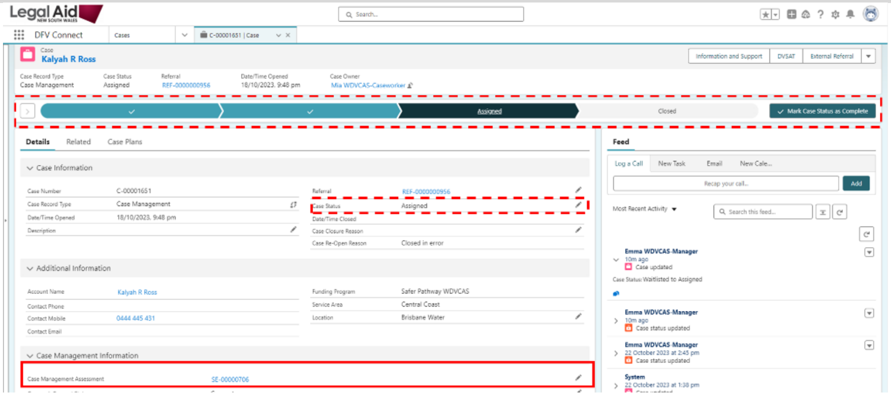
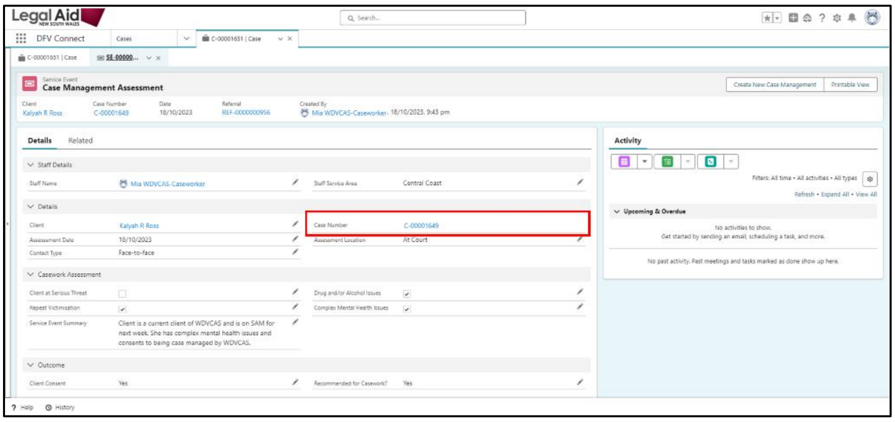
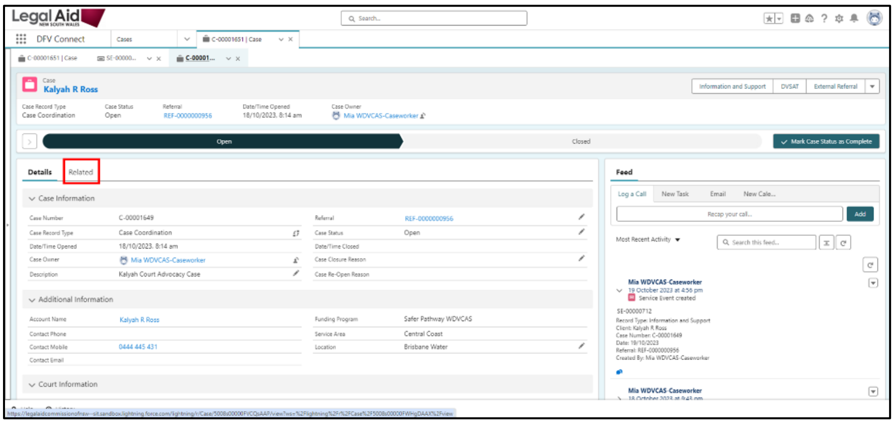
When a caseworker is assigned a case management case, they should:

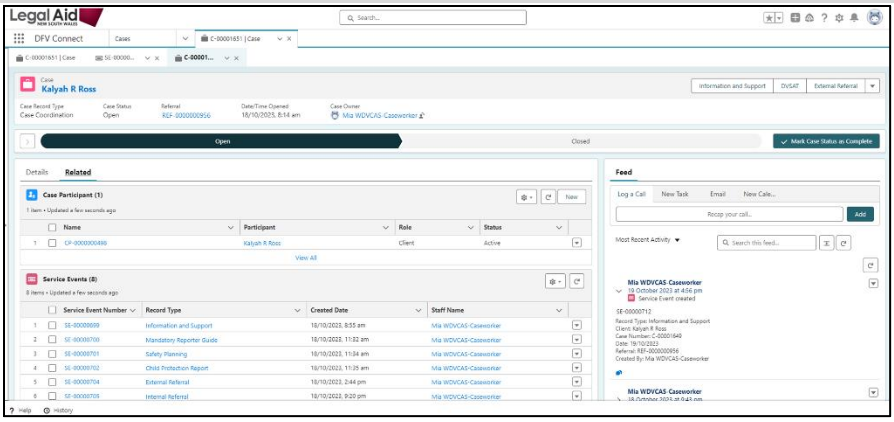
- Review the case management assessment (on the case management case) to understand client's circumstances and
- Contact the client and in consultation with them, develop a case plan.



Process steps

Step	Description
1.	There are few ways to access case that has been allocated to you: 1. Click on the link from the email that you received titled "**Case transferred to you**" 2. Navigate directly to the case via the **Main Menu** > **Cases** > **My Open Cases.** 3. Alternatively, as the caseworker who has just been assigned a case and your manager has commented on the case, you have received a notification (see screenshot below 
2.	The Case Record will be displayed. Check that the status is in 'assigned' status. The status is indicated by both the tab bar as in this screen short and it is also recorded on the case in the case status field. You can change the status by clicking on selecting the status and marking it as complete or clicking on the pen icon and updating to assigned. You should then review the case management assessment service event to see why the client was referred. You can access directly from the case record.

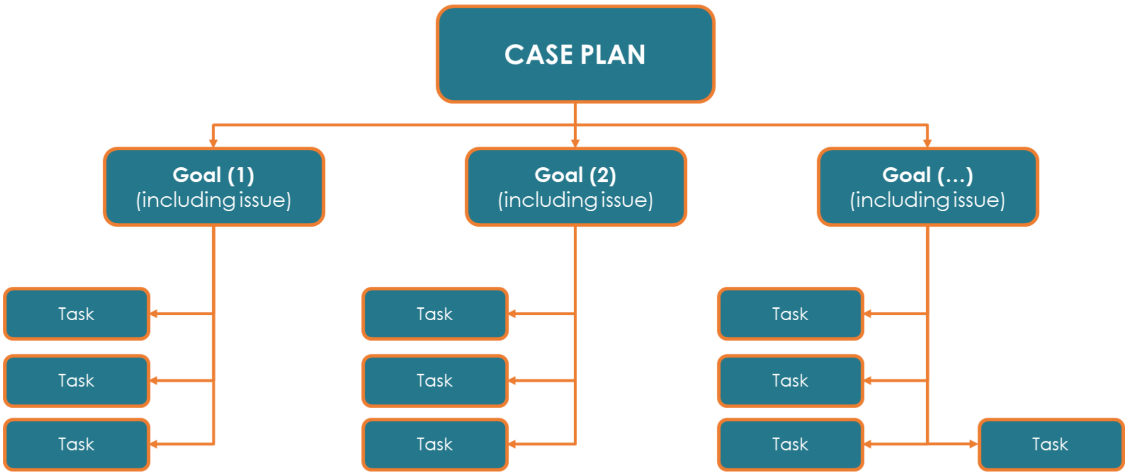
Step	Description
	
3.	Review the assessment and see why the client was referred for casework. You can also access the case coordination case to see other services provided to the client and information about the current situation. 
4.	To check the client information and current situation in the case coordination case, click on the related tab. 
5.	From here you will be able to review their history. You can also access the client's person account to see more information about the client.

Step	Description
	
6.	The case is now in Assigned status and ready for caseworkers' activities. See Service events (also applicable to Case Management cases) for list of activities.

Create a case plan

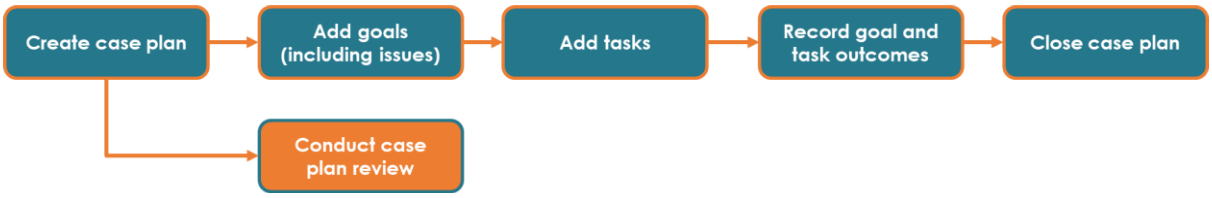
Once you have contacted the client and determined their needs and goals, you should create a case plan. You cannot create separate case plans for dependent children, actions required on behalf of the client's dependent children can be recorded as a case plan task.

In DFV Connect, each case plan will have goals and a related issue description. For each goal, you can add as many tasks as required.



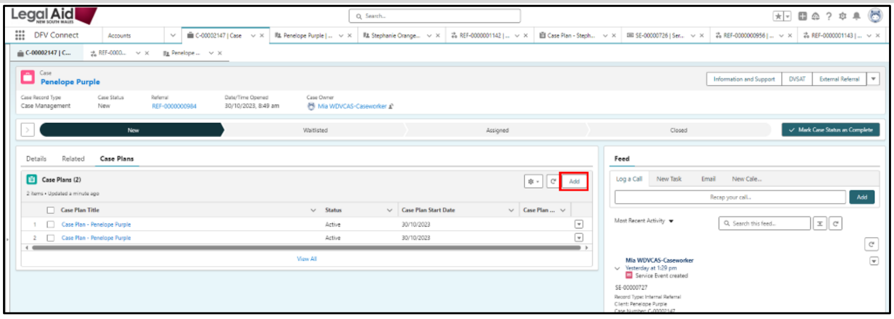
There are twelve goals that can be selected when creating a case plan. In DFV Connect they are called 'top goals', however, can be viewed as the related high-level goal or means to categorise your client's issues. When creating a case plan all goals can be selected or you can select the required ones and add additional goals later.

Top Goal List		
DFV understanding and recovery	Drug and alcohol support	Education and skills
Empowerment	Financial	General health
Housing	Legal	Mental health
Parenting	Physical health	Safety

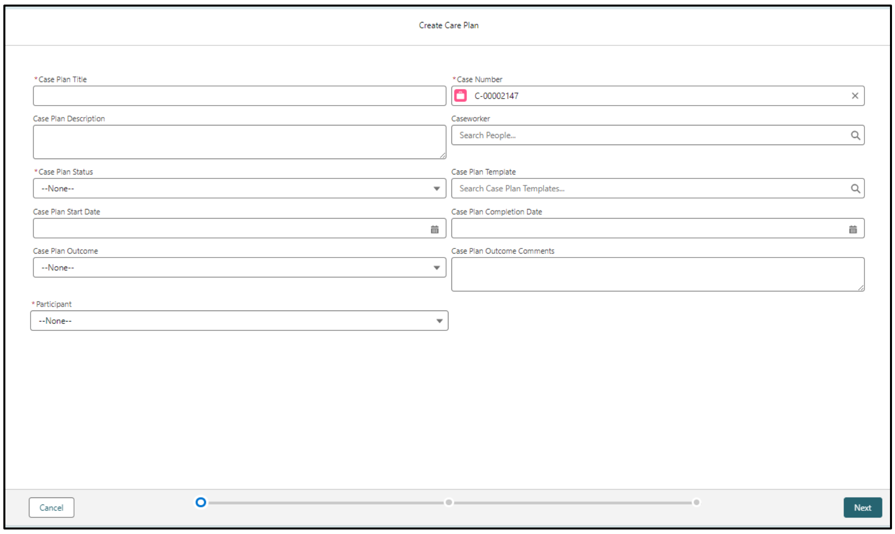


Process steps

Step	Description
1.	From the Case Management case, click on the **Case Plan** tab, then click **Add.**

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td></td></tr>
<tr><td>2.</td><td>The Create Care Plan will be displayed. Complete the fields as required:

Case Plan Title
Case Plan Description
Caseworker – search for and select the assigned Caseworker
Case Plan Status - should be set to Active for new plans
Case Plan Template - select the Case Plan Template
Case Plan Start Date - as today
Case Plan Completion Date and Outcome comments leave blank.
Participant – add the clients name

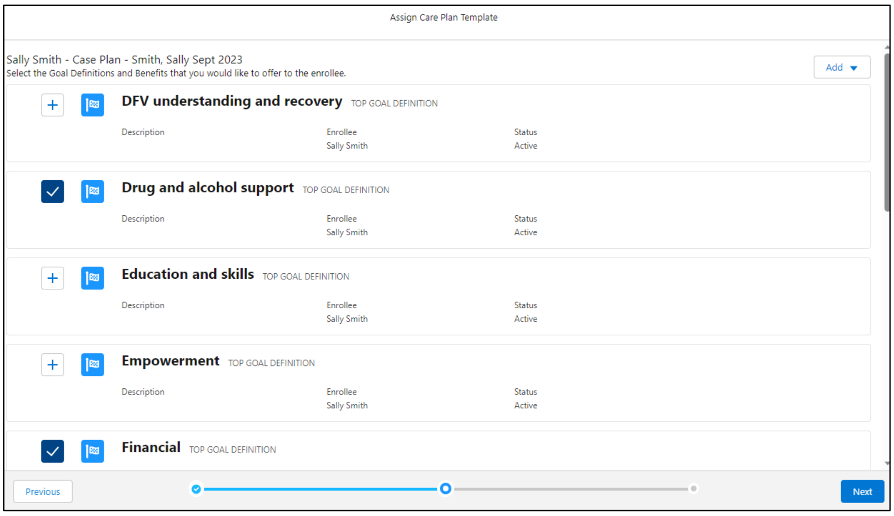
Click Next


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

3. Based on the selected template the list of goals will be displayed. By default, all goals are selected. Un-tick any that are not relevant to your client.

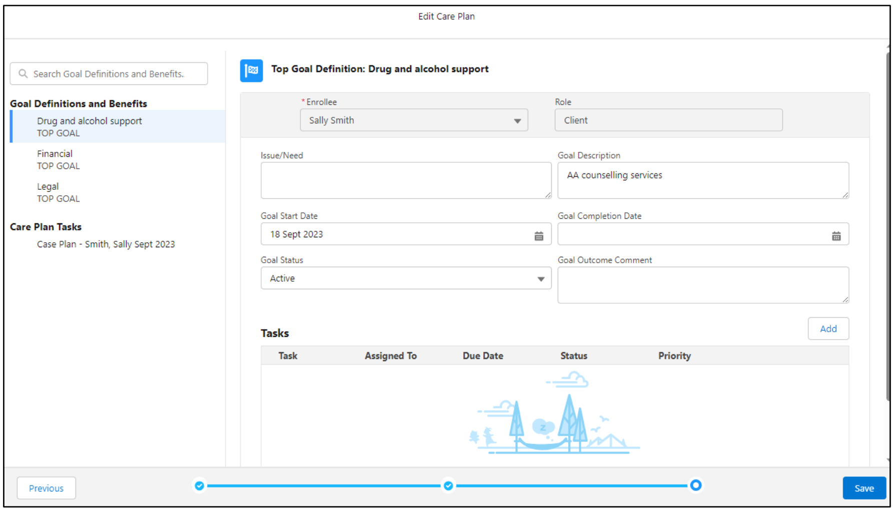
   Note: New ‘top goals’ can be added by admins – let us know!

   Click **Next**



4. For the first goal that you have selected, enter the **Issue/Need** and the **Goal Description.**

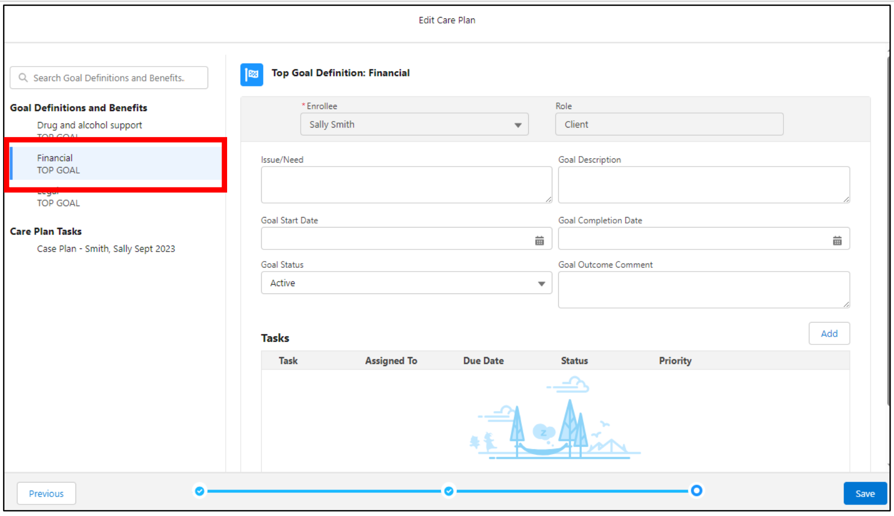
   Click **Add** to add **Tasks** for the caseworker to remind them of activities needed to help the client reach this goal.



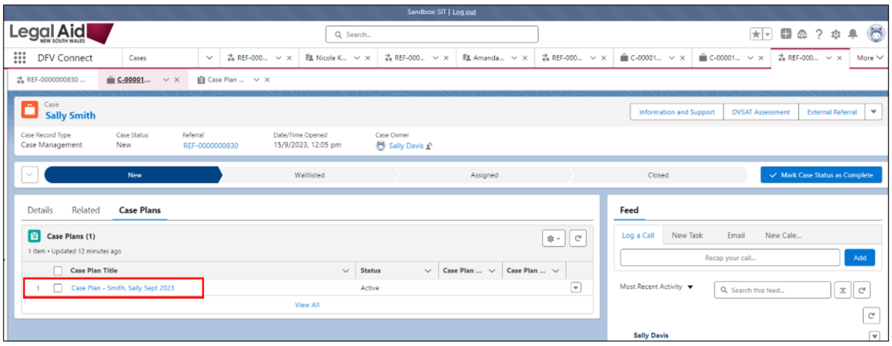
5. Click on the next goal, and enter the **Issue/Need** and the **Goal Description.**

   Continue until you have details recorded for each Top Goal.

   Click **Save.**



6. The **Case Plan** will be created. Click **Edit Care Plan** to make any changes.



Referral and Case Closure

Close referral

A referral is closed when all services are complete for the referral received.

Before closing a referral, you must:

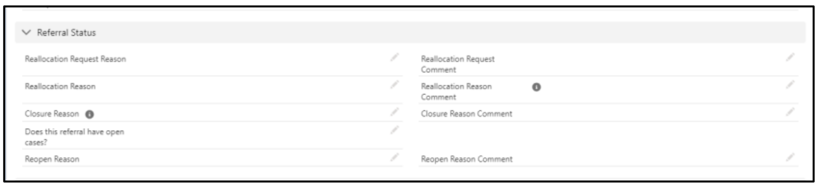
- Record the referral consent status and date
- Close all related active cases

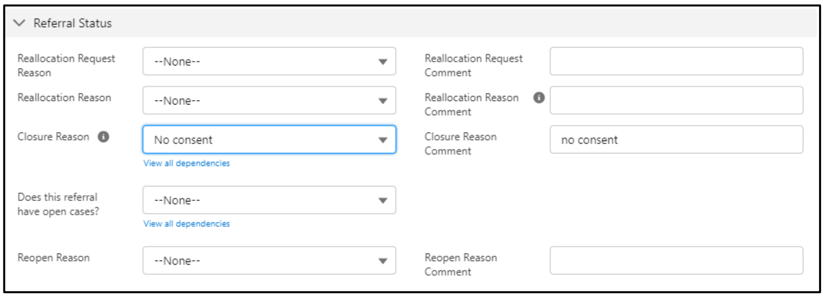
Practice rules

a. In the scenario where the consent status is – No Consent and the Assessment (i.e., DVSAT) is ‘At Threat’, where a client has not consented for an ‘At Threat’ referral, you can close the referral after recording ‘No Consent’ and closure reason "No Consent". This only applies to ‘At Threat’ referrals. The referral can be closed on DFV Connect after adhering to KPI’s i.e., one (1) contact attempt by 1 business day and three (3) contact attempts within 5 business days from receiving the referral.

b. Where contact has been made with an ‘At Threat’ referral the case coordination case and referral will remain open until the court matter is completed or client disengages with your service.

c. Where a client has not consented for an **‘At Serious Threat’ referral** (e.g., you cannot contact client, it is not safe to contact the client etc.), you should update the referral consent status to “Consent Not Obtained” and you should **not close the referral.** For all ‘At Serious Threat’ referrals a SAM Case will have to be created. In DFV Connect, the referral remains open until all services have been completed.

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.	Scroll down to the Referral Status section and select a **Closure Reason** from the drop-down list – 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. 
	For CRP referrals, the referral status and closure reason will be automatically sent back to the CRP and the corresponding referral will be closed. There is no need for you to access the CRP. 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 of contact attempt for the referral. An example is, the original number provided is a wrong number and belongs to someone else; police provide a new contact number, and you make 3 contact attempts on the updated number which are unsuccessful, the phone rings out or goes to voicemail. This referral would be closed as ‘Phone not answered’.

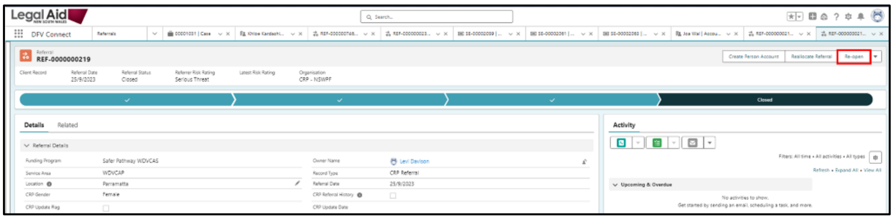
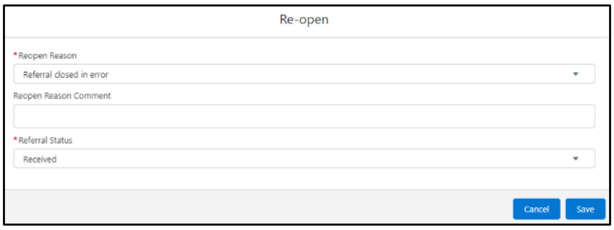
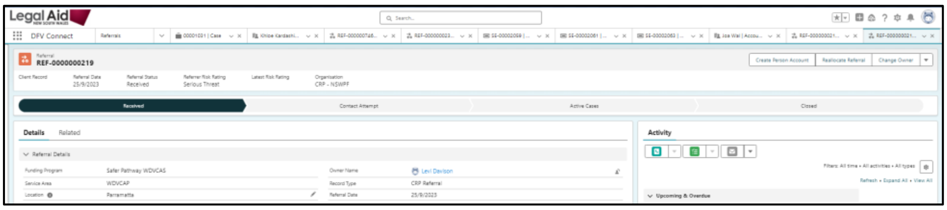
Referral Closure Reason	Description
Support provided	Contact was made with the client, consent was obtained, a case was created, and support was provided. Applies to both ‘At Threat’ and ‘At Serious Threat’ referrals.
No consent	Contact was made with the client who did not provide consent for support services. The client was rated ‘At Threat’.

Contact made - No consent, SAM only	Contact was made with the client who did not provide consent for support services. The client was rated 'At Serious Threat'. The referral should not be closed until after the SAM Coordinator has removed it from the SAM agenda.
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 such as the Police DVO to confirm the victims contact details before closing a referral for this reason. You should also record the contact with the DVO.
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 or DVO, and it was determined that the referral has been made in error e.g. NSW Police issued a delete request, the POI is under 10 years old and/or the victim is under 16 years old.
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 required. Be sure to also update the Person Account and update the Deceased Status on this record.
No Contact - Not attempted, SAM only	No contact after contact attempts made – Serious threat referrals only. Contact has not been attempted for the client who is rated 'At Serious Threat' where it has been advised it is unsafe to attempt contact, client is incapacitated. These referrals should not be closed until after the SAM Coordinator has removed it from the SAM agenda.

Re-open referral

If the client makes contact after the referral has been closed, if the referral was closed in error, or for other circumstances such as the closed referral needs to be listed on a SAM agenda bail list, **WDVCAS workers can re-open a referral** by following these steps:

Step	Description

1.	Search for the Referral and click on the referral link (e.g. REF-000xxxx) to open it.
2.	In the top-right hand corner select the **Re-open** button. 
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 back to ‘Received’ Click **Save** 
4.	The Referral status will now show that referral is in Received status. 
NOTE	For CRP referrals, the referral status and re-open reason will be automatically sent to back the CRP and the corresponding referral will be re-opened. There is no need for you to access the CRP.

Re-open reasons

Referral Closure Reason	Description
Closed in error	Referral was closed by accident or with an incorrect closure reason
Victim contact after closure	Referral was closed after unsuccessful contact attempts, or contact was made but victim declined support. However, victim then contacts service after referral closed to ask for support

Other/exceptional circumstances	For example, reopening referrals for the purpose of listing on SAM agenda bail list

Close case coordination case

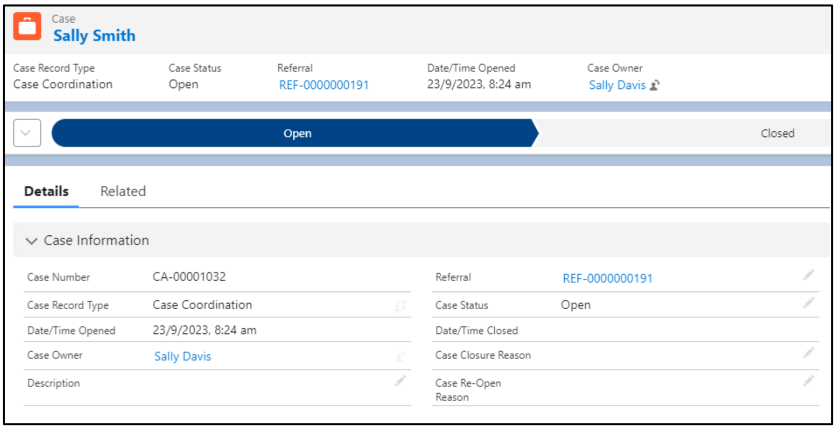
Practice rules

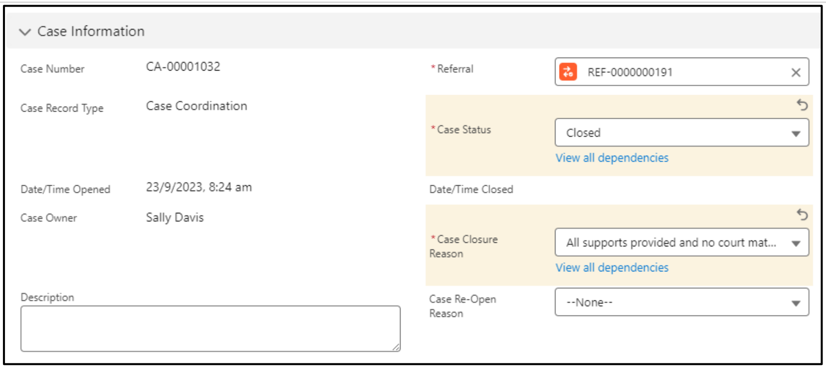
a. In DFV Connect if you are closing a case, then the referral linked to the case should also be closed.

b. The case coordination case and referral will remain open until the court matter is completed or client disengages with your service.

c. WDVCAS Managers will need to run a report every 6 months on open cases to check if any cases can be closed on the system, to avoid them from being open for no reason.

d. Case management case and SAM case will remain open until all work has been completed.

Step	Description
1.	From the Case record, click on a pencil icon to go into edit mode. 
2.	Change the **Case Status** to Closed and select a **Case Closure Reason**. See Case coordination closure reasons for further information to assist you in making the most appropriate selection. Click **Save**

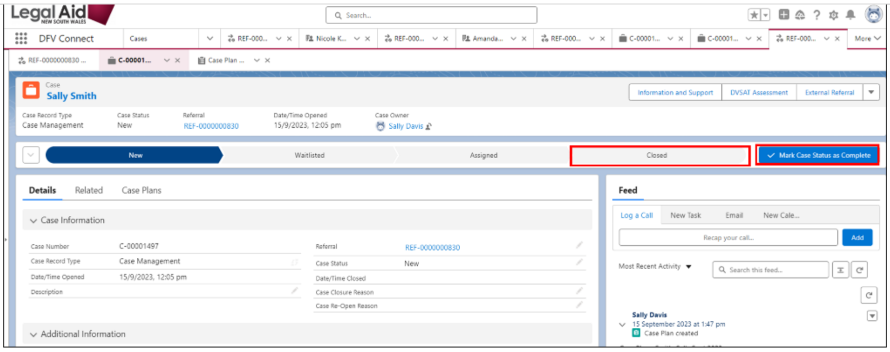
	
	If closing a case because the client is deceased, please remember to also record this on other open cases, the referral(s) and the person record.

Case coordination closure reasons

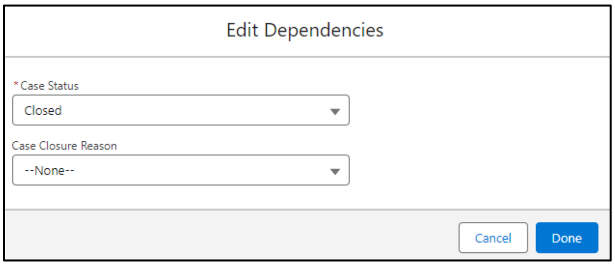
Case Closure Reason	Description
All supports provided and no court matter	Client does not require support and they do not have any court scheduled matters.
All supports provided and court matter finalised	Client does not required support anymore and their court matters are finalised.
Client disengaged	Client is not open to receive support and does not attend sessions nor engage with support workers.
Client deceased	Client deceased – Note – please ensure you record on their open cases, the referral(s) and the person record.

Close case management case

Step	Description
1.	From the case, click on the status **Closed** and then click on the **Mark Referral Status as Complete** button.



2. The *Edit Dependency* Screen is displayed. The **Case Status** is pre-set to Closed. Select a **Case Closure Reason** - See Case management closure reasons for further information to assist you in making the most appropriate selection. Select **Done**



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.

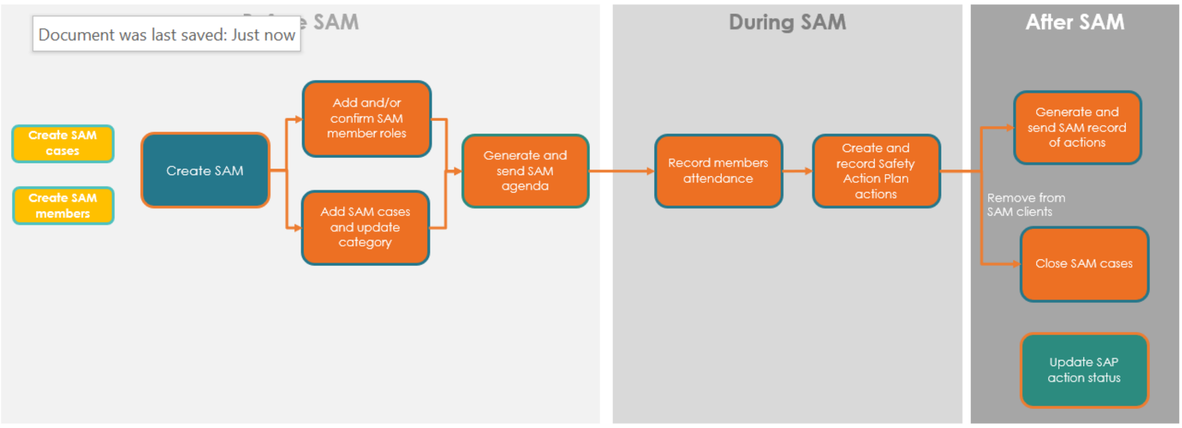
Case management closure reasons

Case Closure Reason	Description
Client disengaged	Client has become unresponsive, uncooperative or has discontinued their involvement in the case without resolution or completion of required actions.
Client deceased	Client deceased
Case plan completed	The client has met their goals and requirements and support and assistance have been provided. Case management has been completed.
Client exited from case management by WDVCAS	WDVCAS office overseeing the case management has determined that the client no longer requires their services and/or does not meet the eligibility criteria for case management.

No available case workers	Case management cannot continue to be managed because there are no caseworkers available to oversee the case and may be referred to another case management service.

Safety Action Meeting

SAM process



SAM terms

Term	Description
SAM record type	There are two SAM record types: • **SAM template:** template used to create SAM • **SAM:** Safety Action Meeting, a new SAM is created for each SAM using the SAM template.
SAM item	All SAM cases are added as a 'SAM item'. All SAM cases will have a 'SAM item' created for each SAM they are added to.
SAM item category	The SAM referral status in relation to SAM. There are three SAM item categories: 1. New Referral 2. Existing Referral 3. Re-graded Referral

SAM list views

1. WDVCAS Service Area – SAM Referrals (Referral list view)

All serious threat referrals (referrer risk rating and latest risk rating from referral) where no SAM case has been created.

2. Service Area – Active SAM Cases (Case list view)

All open SAM cases for your service area.

Create SAM Case

To add serious threat referrals to a SAM, you must create a SAM case.

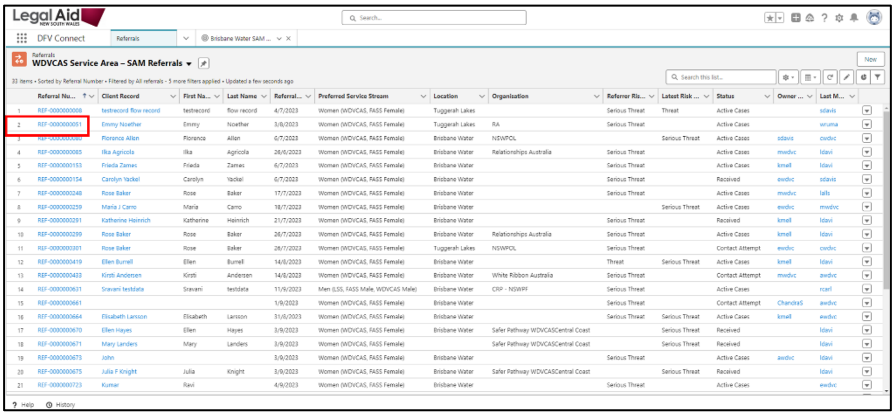
WDVCAS Service Area – SAM Referrals

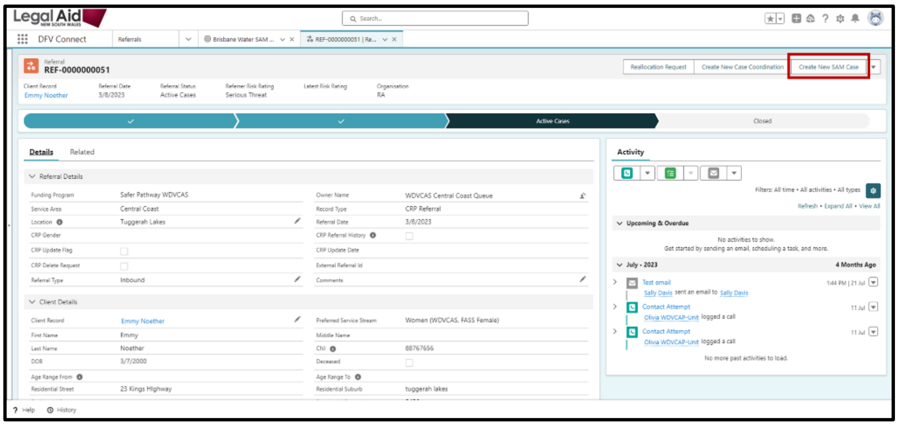
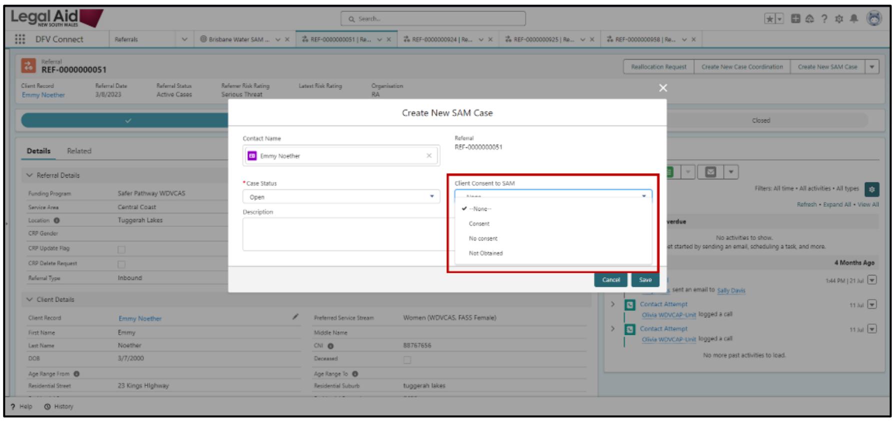
- You should create a SAM case from the **WDVCAS Service Area – SAM Referrals** list view.

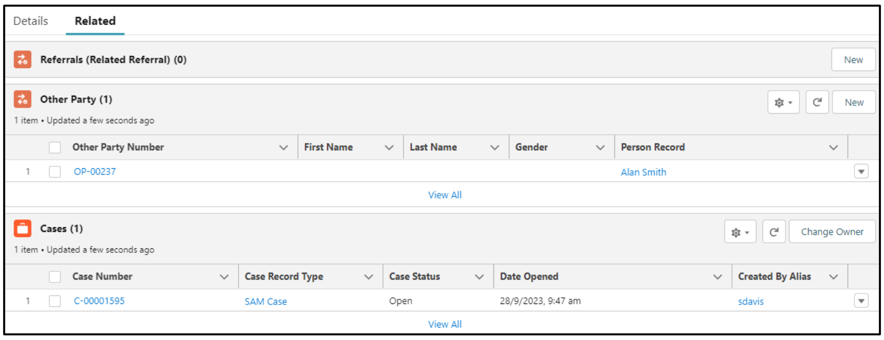
- This list view displays all referrals where the referrer risk rating and latest risk rating from the referral are at serious threat and where no SAM case has been created. This list view should be used to ensure you have created a SAM case for all at serious threat referrals received.

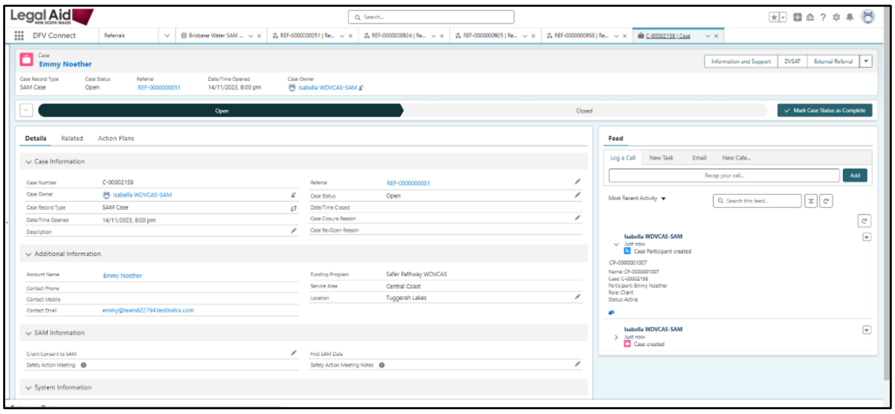
SAM case	
Service events and functions See service events and functions for more information	
DVSAT	Mandatory Reporter Guide
Information and support	Child Protection Report
External referral	Safety planning
Internal referral	
New note	
SAM items and SAM actions	
Court diary	

Process steps

Step	Description
1.	To create a SAM case, go to the **WDVCAS Service Area – SAM Referrals** list view and click on the referral number.  **Note:** If you are a SAM coordinator that also makes contact attempts for "at serious threat" referrals, you can use this list view but the WDVCAS Service Area – Work Allocation list view may be more suitable for you to use as the referrals will disappear after you have created a SAM case.
2.	You can create a SAM case when: • The referral is at serious threat • The referral has been linked to a client account (see link referral to a client person account)

Step	Description
	• You are a SAM coordinator Click on **Create New SAM Case**. 
3.	The *Create New SAM Case* pop-up screen will be displayed. Select the **Save.** **Note**: You can select whether client has consented to the SAM (this is separate to the referral consent status – you can record this at any time). 
4.	The *Case "C-00000xxx" was created* pop-up will appear. Click on the *"C-00000xxx"* number on this pop-up to navigate to the Case. 

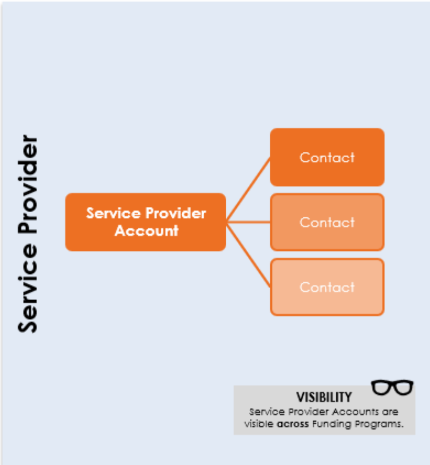
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td></td><td>Alternatively, if the pop-up disappears before you click on it, you can navigate to the Related tab and click on the case number.


Note: Once you've created the SAM case, the create SAM case button will disappear from the referral, as you can only create one SAM case per referral.</td></tr>
<tr><td>5.</td><td>The Case record will be displayed. You'll notice that there is an additional SAM information section on the SAM case, including:
Client consent to SAM: you can enter this information at any time and this will populate onto the SAM agenda
First SAM date: this field will automatically populate once the case has been added to a SAM
Safety Action Meeting: this will display the most recent SAM the case has been added to
Safety Action meeting Notes: this field will display on your SAM agenda, and is where you can include a summary of information about the client..
</td></tr>
<tr><td>6.</td><td>To make additional changes to SAM case, click on the edit (pencil) icon. Make required changes and select the Save button.</td></tr>
</table>

Create SAM Members (contacts)

In DFV Connect, all SAM members will be created as an individual contact from an existing service provider account. All external service provider accounts can now be saved in the system, similar to an address book.

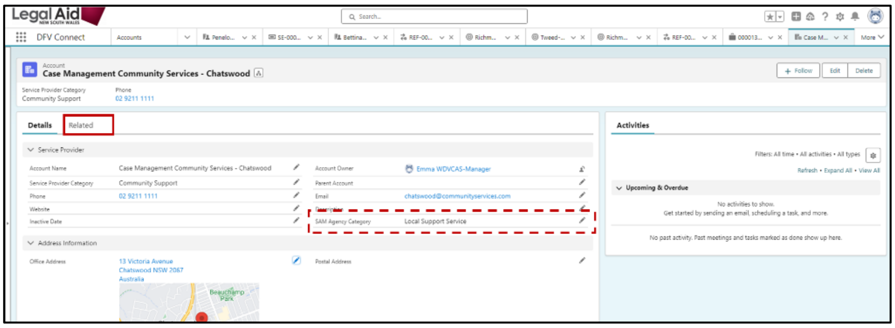
The service provider accounts will be visible and editable by all users in DFV Connect. In light of this, we encourage all staff to always do a **thorough search** of any service provider account, before adding a new account. There may be instances where you will have to create a service provider account to create a contact. See create service provider account for process steps.

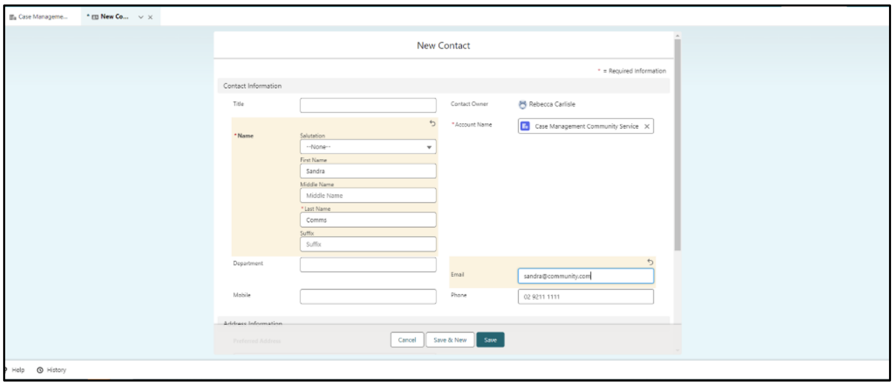
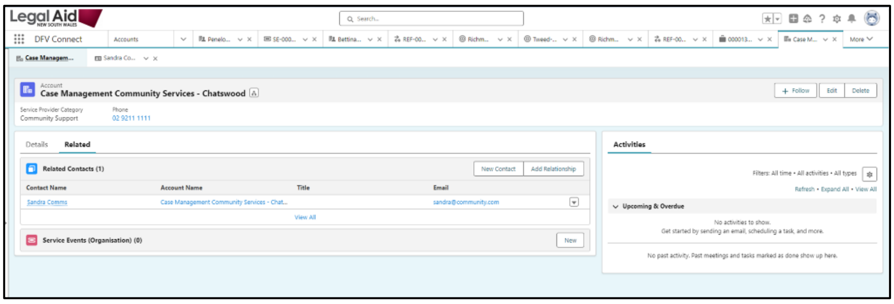


SAM Agency Category

On all service provider accounts there is a SAM agency category field. This information populates onto your SAM, and should be recorded to ensure your SAM members information is probably tracked.

Process steps

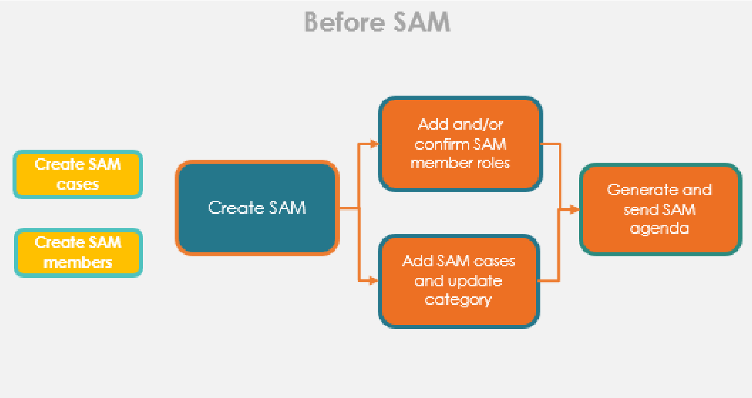
Step	Description
1.	To create a contact (SAM member), select the **Related tab** on the service provider account.  **SAM agency category:** ensure this field is filled with the relevant category when creating your contact.

Step	Description
2.	The account name will automatically populate with the service provider account details including their title (eg., Detective Sergeant) and email (this will populate when sending your agenda and record of actions). Select **Save**. 
3.	The individual contact is now saved as a contact on the service provider account. 

Before SAM

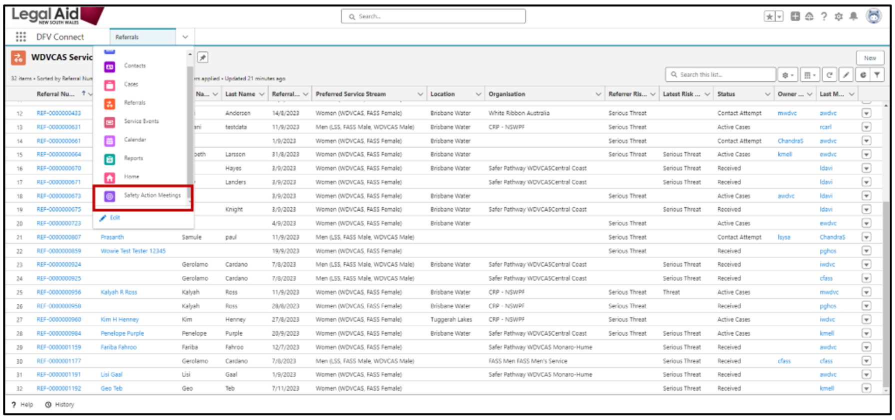
Prior to a SAM, you will:

- Create a SAM
- Add and confirm SAM member roles
- Add SAM cases and update the SAM item category (ie., the SAM referral category).



Edit SAM template and create SAM

Process steps

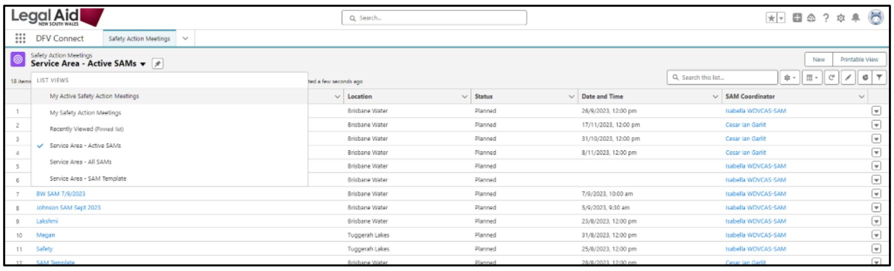
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>To create a SAM, you will need to access the Safety Action Meetings component from the Main Menu.
</td></tr>
<tr><td>2.</td><td>Once you've accessed Safety Action Meetings are, you will be able to view list views depending on your requirements.
• The Service Area – Active SAMs displays all upcoming SAMs within your service area
• The Service Area – All SAMs displays every SAM created for your service area.
• The Service Area – SAM Template will display all SAM templates for your service area.
There are two SAM record types:
1. SAM Template – there will only be one SAM template for each location. Only WDVCAP can create a SAM template, and your service area will only have access to the SAM templates within your service area. The SAM template can</td></tr>
</table>

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

be edited by you and should be used to create all your SAMs as it will include all your regular members and standing SAM information, so you do not have to re-enter this information for each SAM.

2. **SAM** – the SAM is a record of each individual SAM, you will create a new SAM using the SAM template for each fortnightly SAM.

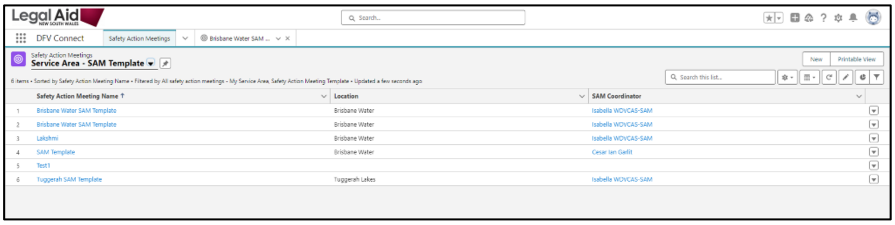
If your service area has more than one location, all the SAMs created will be visible.



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

To edit a SAM template, select the required SAM template.

Note: This screenshot has test data visible, in production WDVCAS offices will have only one template for each location.

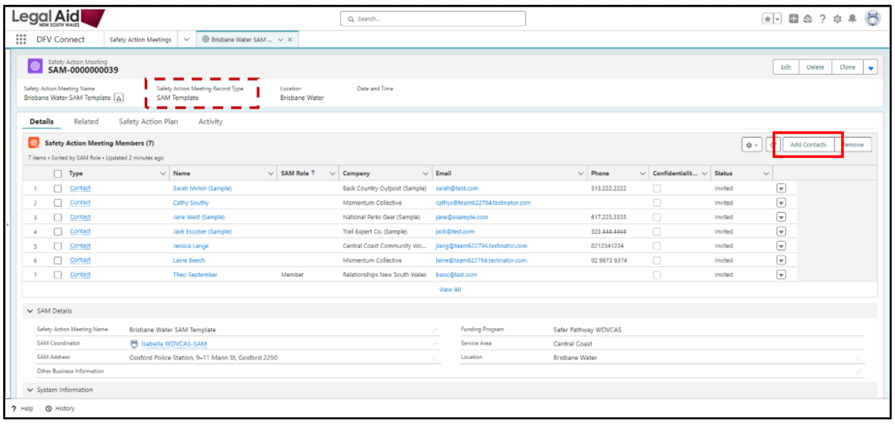


</td></tr>
<tr><td>4.</td><td>

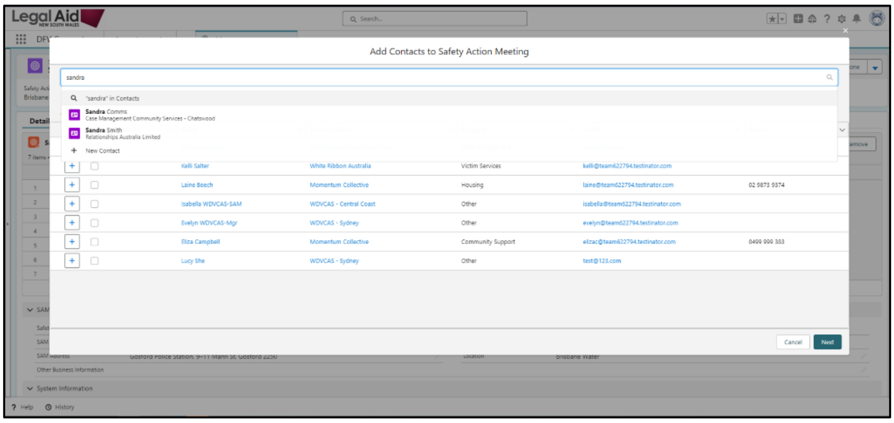
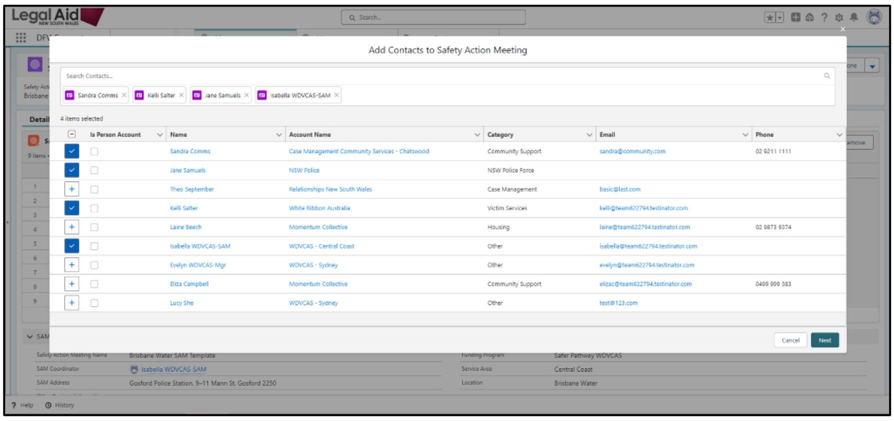
The SAM template will have two sections for you to update:

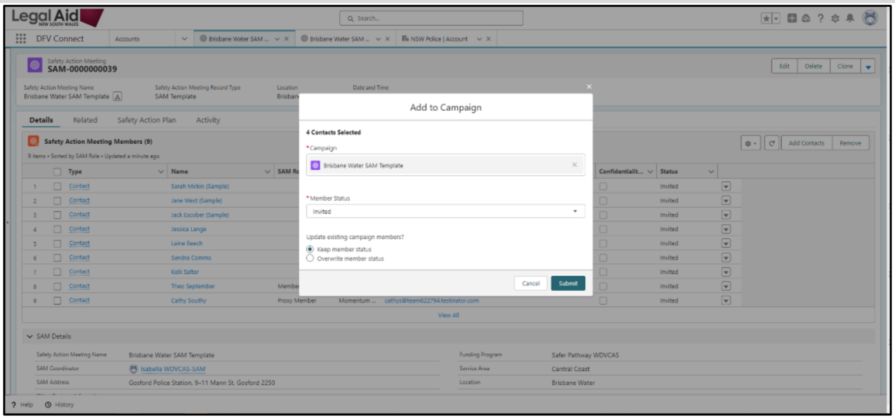
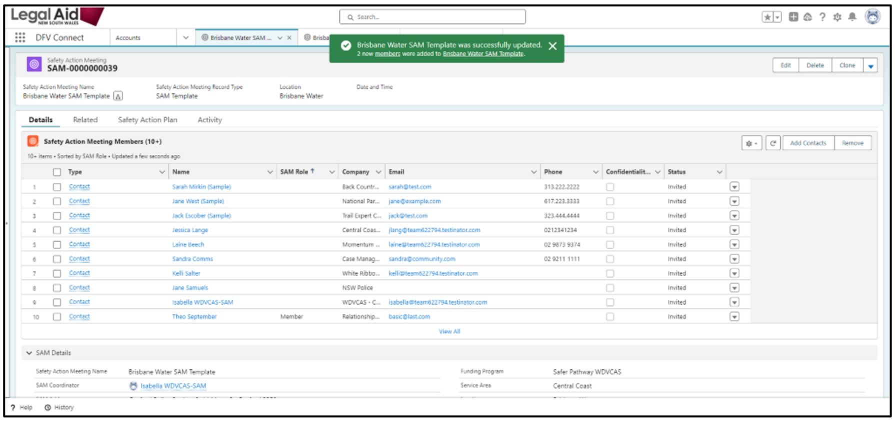
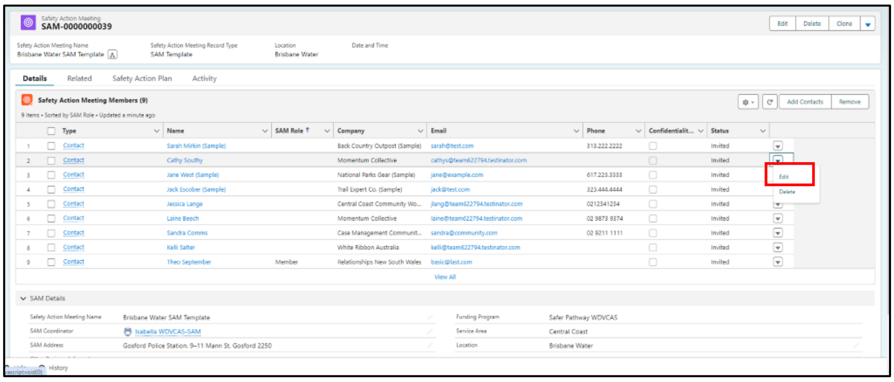
- SAM Members and
- SAM details.

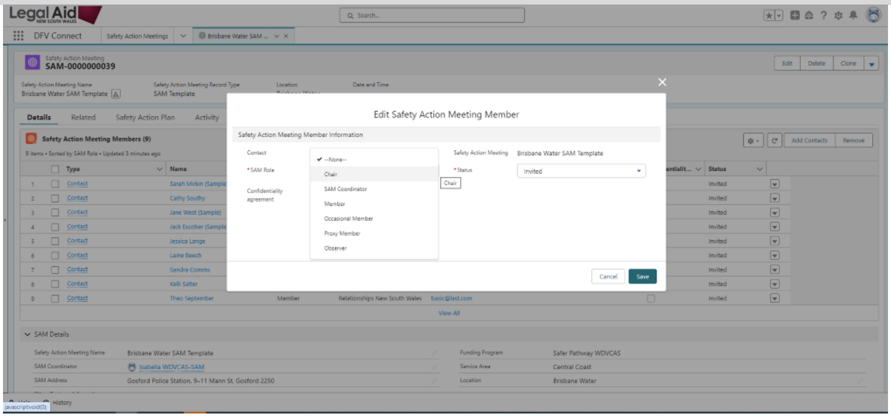
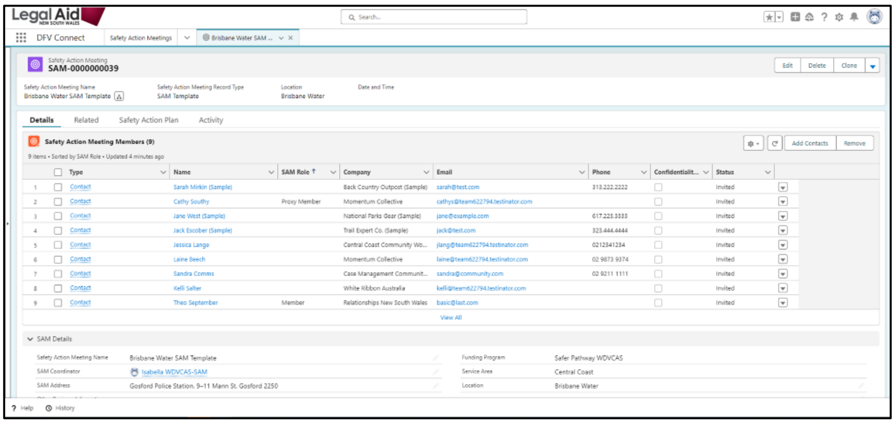
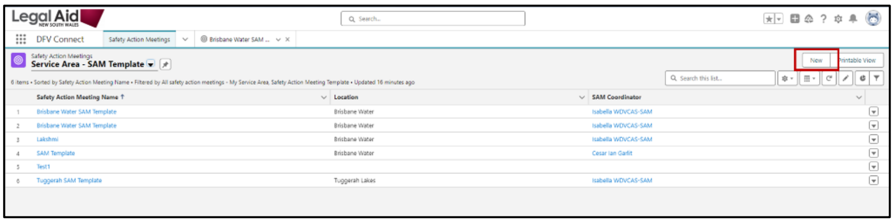
To add regular members, you can select the **add contacts** button.

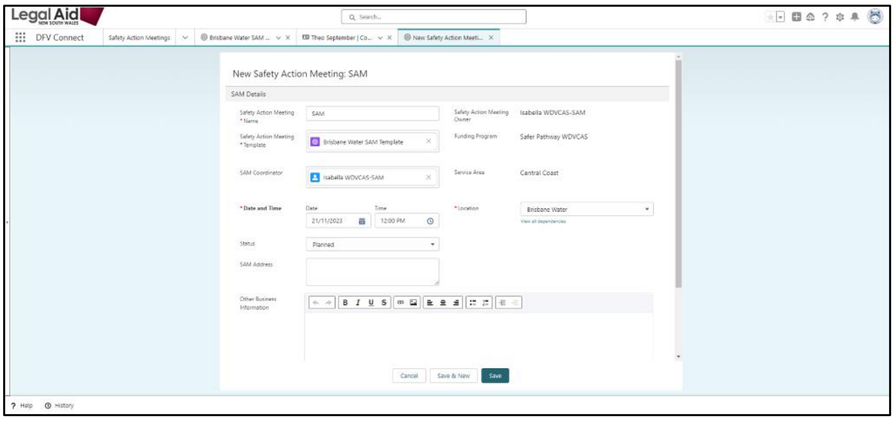
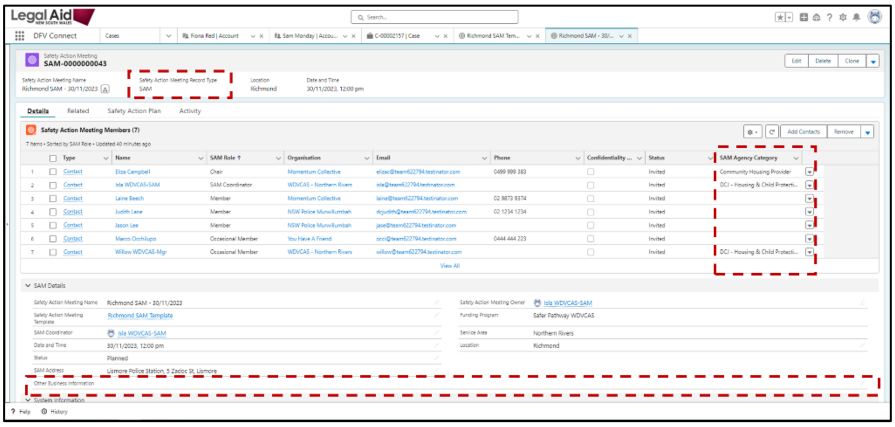


</td></tr>
</table>

Step	Description
	Note: The SAM template looks like the SAM but is indicated by the Safety Action Meeting Record Type as SAM Template, and the name.
5.	Search for the contact: • If you have already created the contact, then this contact will appear. • If the contact has not been created, then you can also add it by selecting new contact option. 
6.	Make sure the tick next to the contact is selected before clicking next (you can add multiple members at once).  **Note:** You must include your name to this member list as this information will populate onto the generated SAM documents.
7.	On the SAM template, the member status should remain as **invited**. You should only update their status when you have created the SAM.

Step	Description
	
8.	You will receive confirmation that you have successfully added the members to your template. 
9.	Once you've added your regular SAM members to your template, you can update their roles. Select the arrow to the right of the column in the member you would like to update and edit. 
10.	A quick-action pop-up will appear, where you can select the relevant role for the SAM member.

Step	Description
	
11.	Once selected, their role will be updated. Once you have updated all your SAM information and any other details on your SAM template, you can now create your SAM. Go back to the Safety Action Meeting list views to show this (Safety Action Meeting > Service Area – SAM Template). 
12.	From the Safety Action Meeting > Service Area – SAM Template, select **New**. 
13.	The mandatory fields in this pop-up are: • **SAM name** – this name will populate with the date selected so you can just write a generic name when creating. • **SAM template** – when using the system, you should search for the name of your SAM location to select.

Step	Description
	• **Date and time** – enter the date and time of your SAM • **Location** – select the SAM location Please note that while SAM address and other business information are blank on this pop-up, the system will generate with information saved from your SAM template if this has been filled so you do not have to enter this information here. 
14.	Upon creating the SAM, the: • Name will automatically populate with the location of the SAM and the date. • SAM members from the template • SAM member category – this will display in the SAM only. If this information is blank, you should select the name of the organisation and update the SAM agency category so it is properly recorded so it is able to be reported. • Record type will display as a 'SAM' record. • Other Business information will populate onto your generated word documents. You can edit this information by clicking on the pencil icon.  • The related tab, will display all SAM items and files added to your SAM.

Step	Description
	• The Safety Action Plan tab will display all safety action plans for the SAM cases added to your SAM, at present we haven't added any SAM cases so we'll look at this shortly. • The activity tab will display all files created and emails sent from this SAM record.

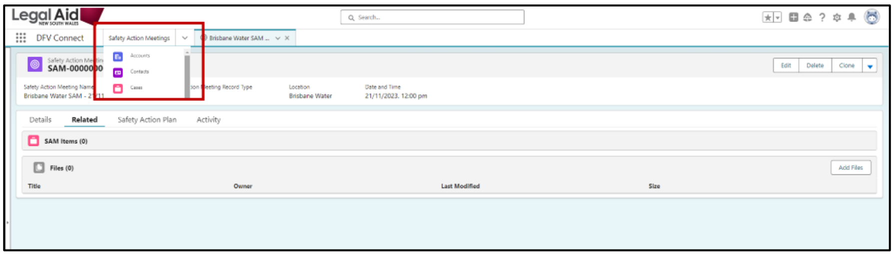
Add SAM cases

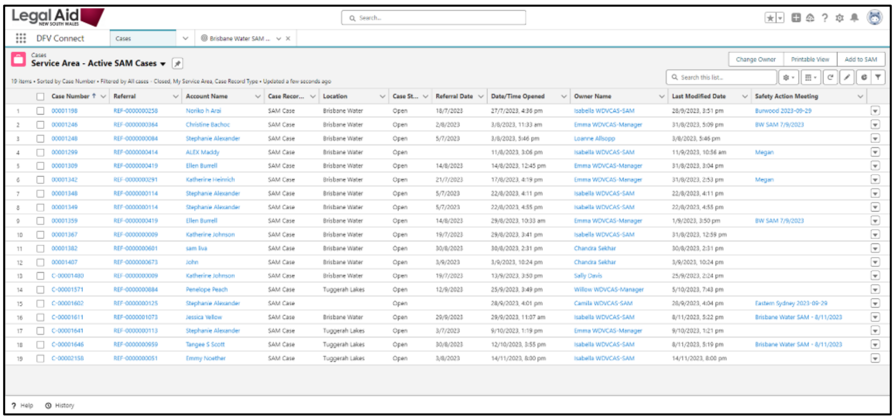
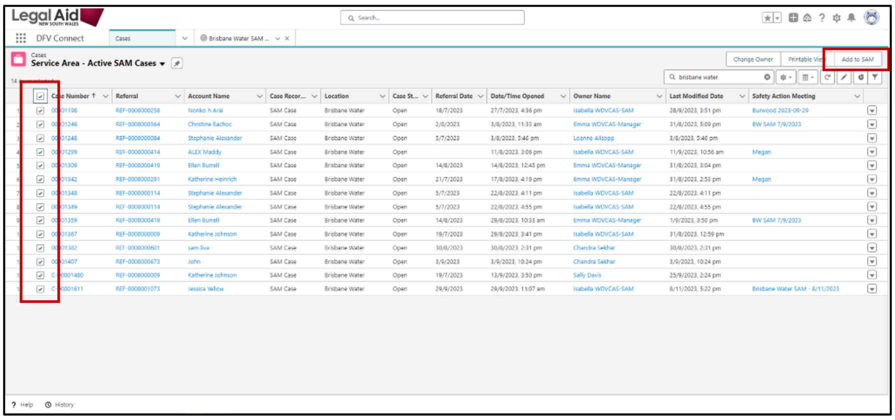
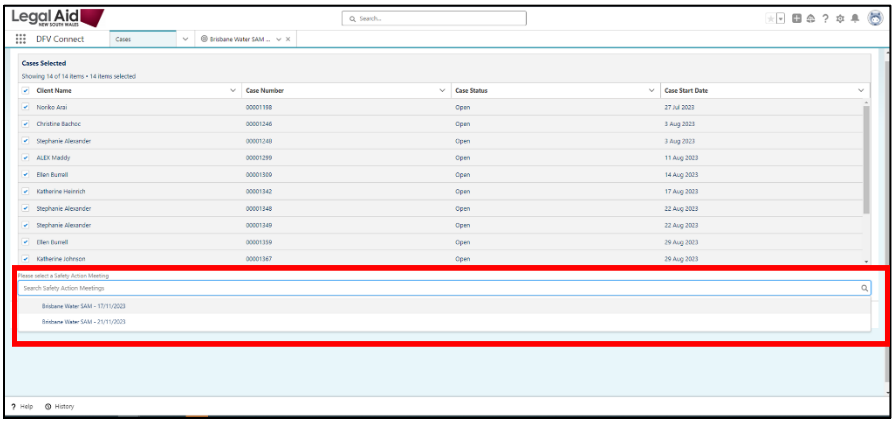
You can add SAM cases to your created SAM at any time.

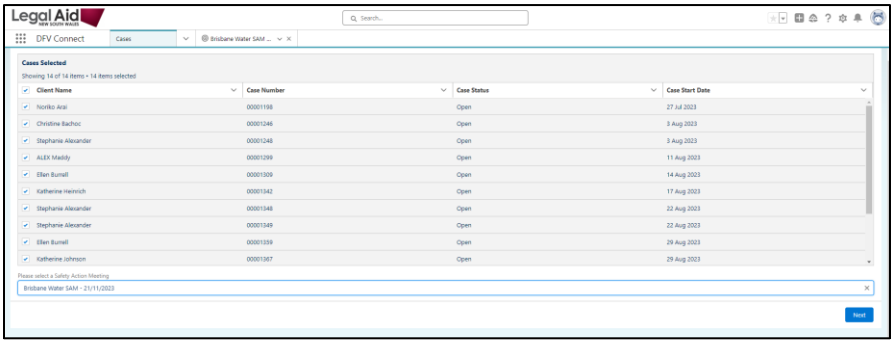
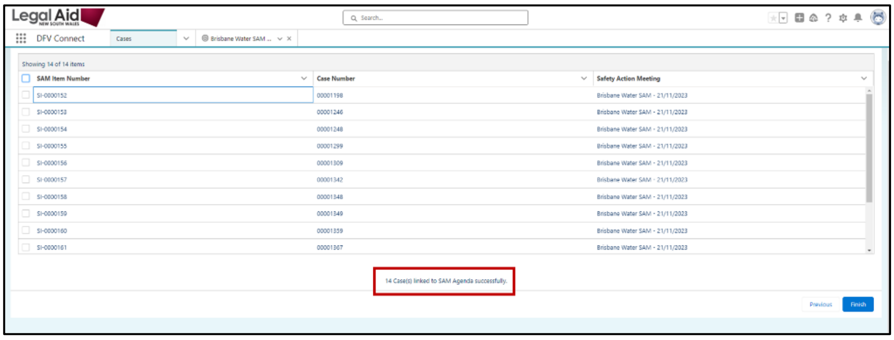
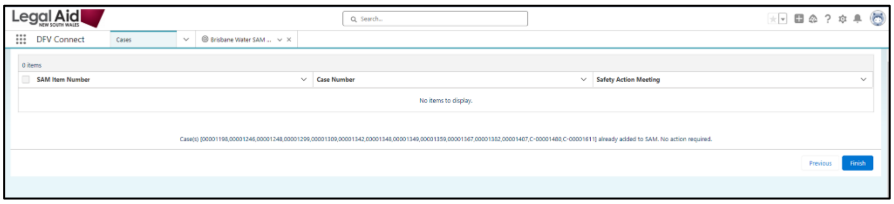
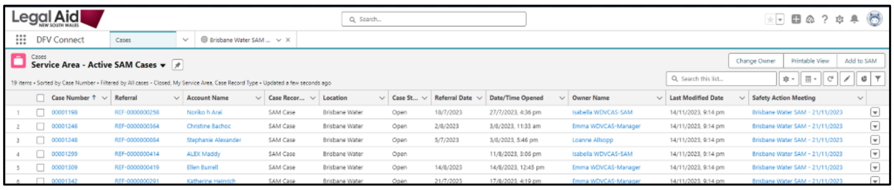
Notes

- The 'select all' option from the Service Area – Active SAM area case list view allows you to select previously added SAM cases each time a new case is created without adding it to the SAM multiple times.
- The **SAM item category** indicates the SAM referral status (existing, new and re-graded). The system will automatically recognise if a SAM case has been added (will update to 'new' if it's the first time and 'existing' if it has already been added). automatically recognise if a SAM case has already been added to a SAM and will populate as 'existing'.

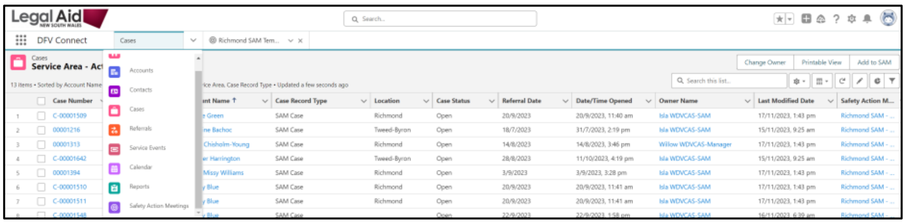
Process steps

Step	Description
1.	Go to the **Service Area – Active SAM case** by selecting cases from the Main Menu. 
2.	To add SAM cases to your SAM, we'll need to go to the **Service Area – Active SAM case list view.** We can do this by selecting cases from the main menu.

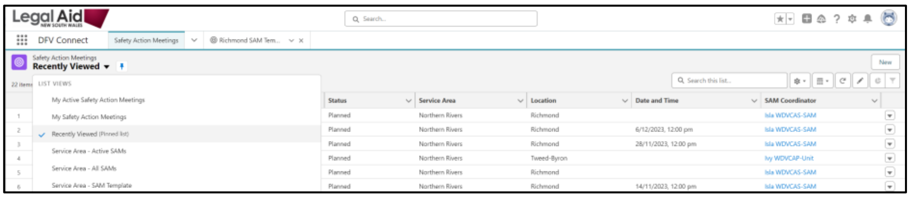
	If your service has more than one location, you should use the search bar to see SAM cases for you location only. 
3.	Once you have all your relevant cases visible, you can now add to SAM. Select the checkbox in the top lefthand corner of the list view to select all SAM cases and then select the **add to SAM** button in the top righthand corner. 
4.	The cases selected screen will appear. • Select the checkbox to add all SAM cases • Select the Safety Action Meeting box and Search for the SAM in the search area below the list to add the cases to (only future SAMs should appear in this list). 

5.	Once you've selected the required SAM, select **next**. 
6.	A successful notification will appear. Select finish to complete. 
7.	Select **Finish**.  **Note:** you can only add SAM cases once to a SAM, so you can always select all and this screen will notify you that ones have already been added to the SAM, as shown in this screenshot here. This allows you to always use the select all option if new SAM cases have to be added to a SAM after you have already added SAM cases.
8.	You will be taken back to the SAM screen. 

9. Go back to the Safety Action Meeting you added the cases to by selecting Safety Action Meeting from the Main Menu.

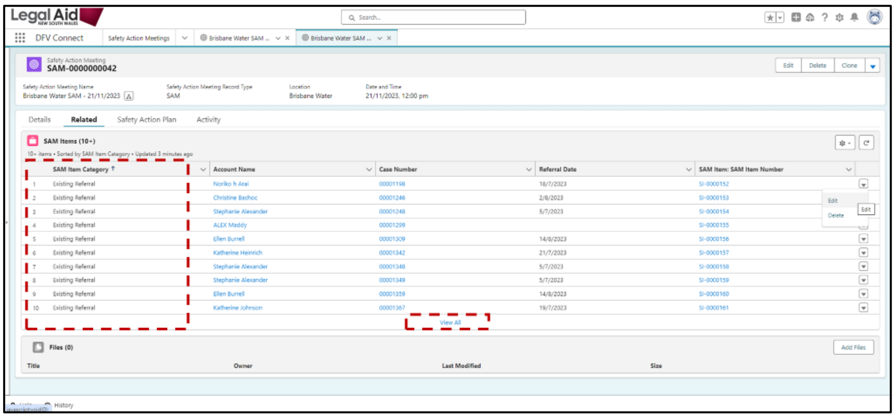


10. Select the SAM created from the list view (my Safety Action Meetings will display all SAMs where you are the SAM coordinator).



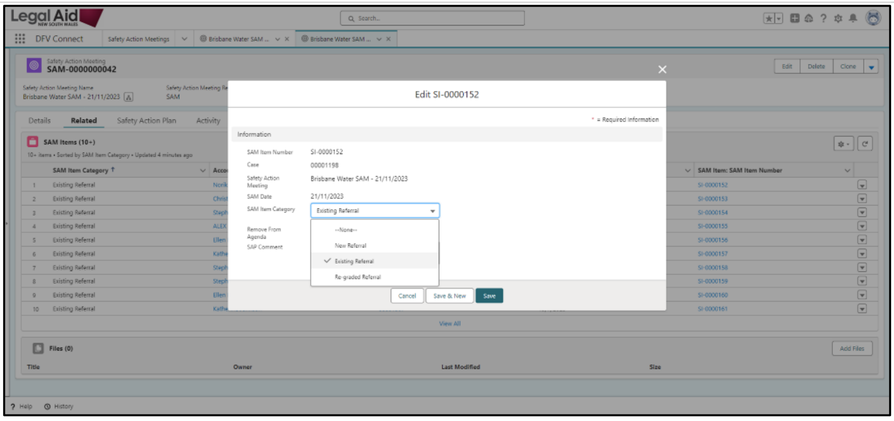
11. To confirm the cases have been created and update their referral status, go to the related tab of the SAM. This is where all SAM items (cases) will be visible.

    - The **SAM item category** indicates the SAM referral status (existing, new and re-graded). The system will automatically recognise if a SAM case has been added (will update to 'new' if it's the first time and 'existing' if it has already been added). automatically recognise if a SAM case has already been added to a SAM and will populate as 'existing'.
    - This list will only display 10 SAM cases, you can select **View All** to view all cases added.



12. If you notice the SAM item category is incorrectly or the SAM case is a re-graded referral, you can update the status by selecting the arrow and then edit in the corner of the SAM item.

    Select the relevant category and **save** to update it.



Generate SAM agenda document

Once you have confirmed the SAM members information and the items added are correct, you can generate the SAM agenda document.

SAM agenda document first page example

Brisbane Water Safety Action Meeting Agenda
Gosford Police Station, 9–11 Mann St, Gosford 2250
21/11/2023 at 01:00

Chair	Jane Samuels, Detective Sergeant, NSW Police
SAM Coordinator	Isabella WDVCAS-SAM, Central Coast WDVCAS

Attendees		**Status**
Regular Members	Laine Beech, Momentum Collective Kelli Salter, White Ribbon Australia Jessica Lange, Central Coast Community Womens Health Centre Theo September, Relationships New South Wales	Invited Invited Invited Invited
Occasional Members		
Proxy Members	Cathy Southy, Momentum Collective	Invited
Observers	Sandra Comms, Case Management Community Services - Chatswood	Invited

SAM agenda document reference (existing referral)

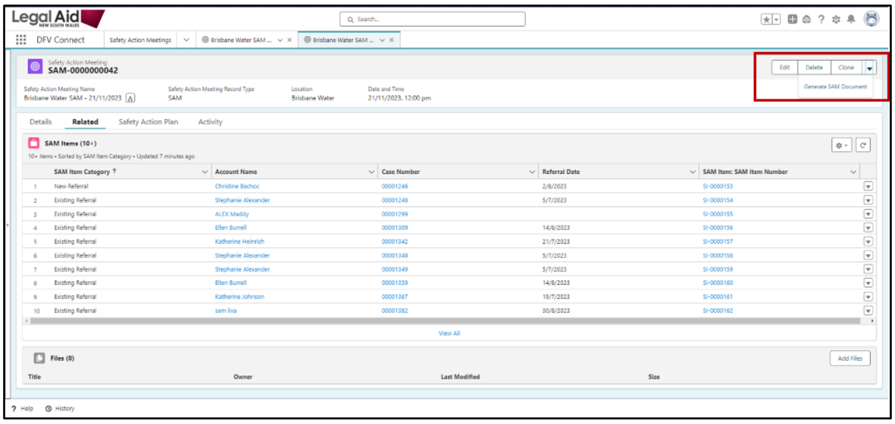
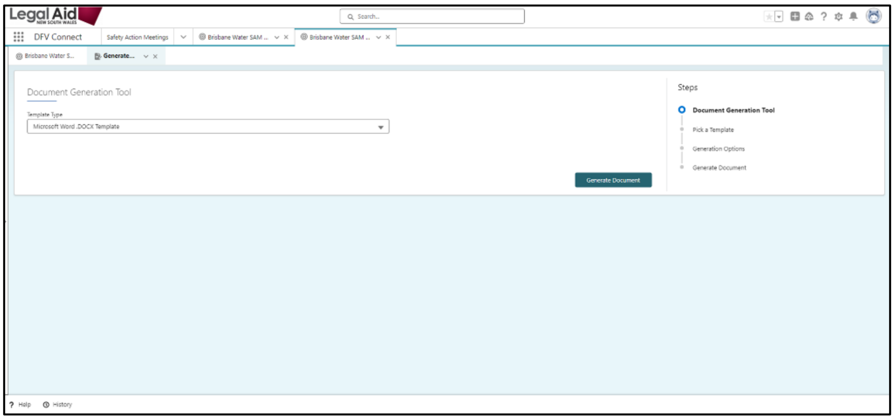
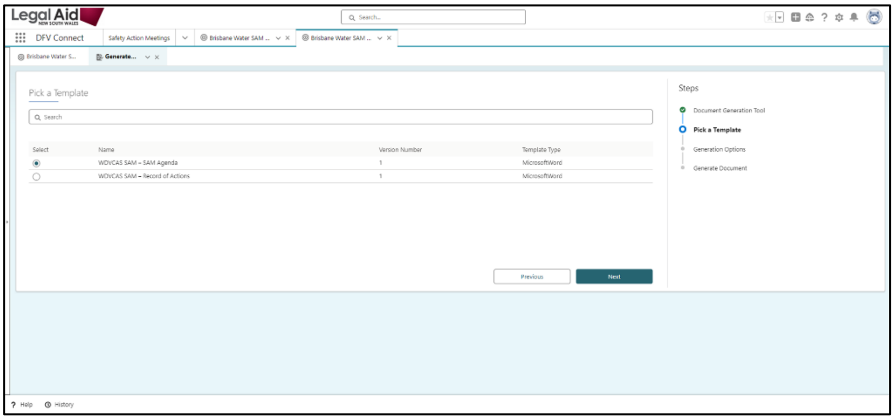
Existing referrals			
<Client First Name Last Name>	DOB: <dd/mm/yyyy>	<Preferred Service Stream>	CNI: <123456789>
<Client Residential Address>		<Aboriginal/Torres Strait Islander>	Client consent to SAM: <SAMcase.Consent status>
Date discussed at SAM: <dd/mm/yyyy>		Current risk rating: <person record.current risk rating.referral>	

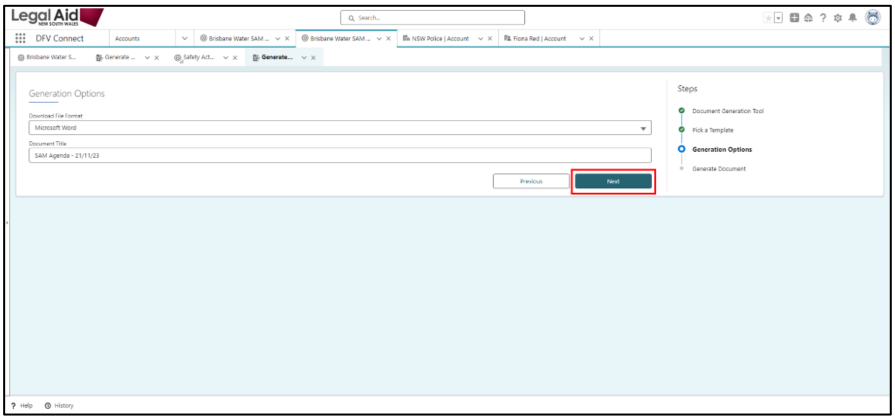
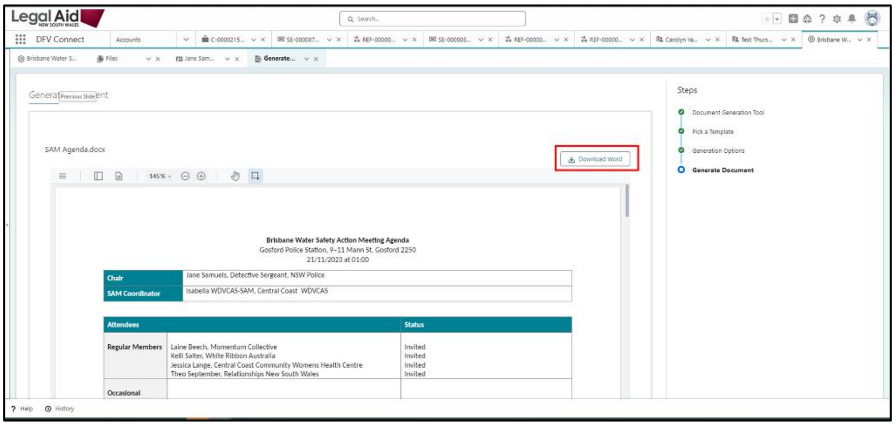
Referral Information	**Dependent Children Information**	**Other Party Information**
Referral Number: <Referral Number> **Organisation:** <Referrer Organisation> **Event Number:** <Event Number> **Referral Date:** <Referral Date> **Referrer Risk Rating:** <Referral Risk Rating> **Incident Date:** <Referral Incident Date> **Incident Address:** <Incident Address> **Client Consent:** <Referral.Consent Status>	<Dependent Child Name> **DOB:** <Dependent Child DOB> <Aboriginal/Torres Strait Islander> **Address** <Dependent Child Address>	<Other Party First Name, Last Name> **DOB:** <Other Party DOB> **CNI:** <Other Party CNI> <Other Party Address> **Relationship to client** <Relationshipwithclient> <Aboriginal/Torres Strait Islander>
Notes / ADVO or bail conditions / Other Party custody status etc. < Safety Action Meeting Notes> SAM case		

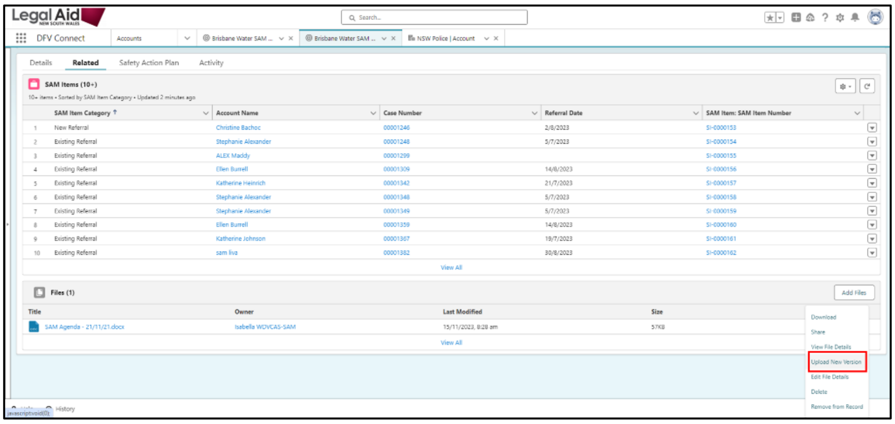
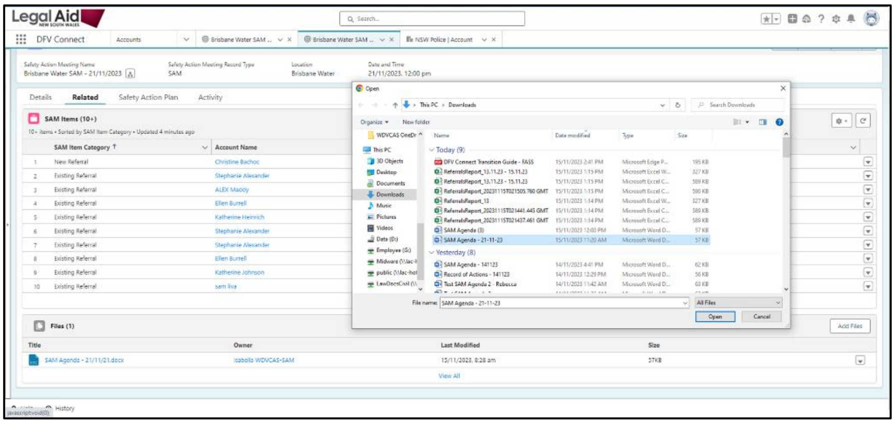
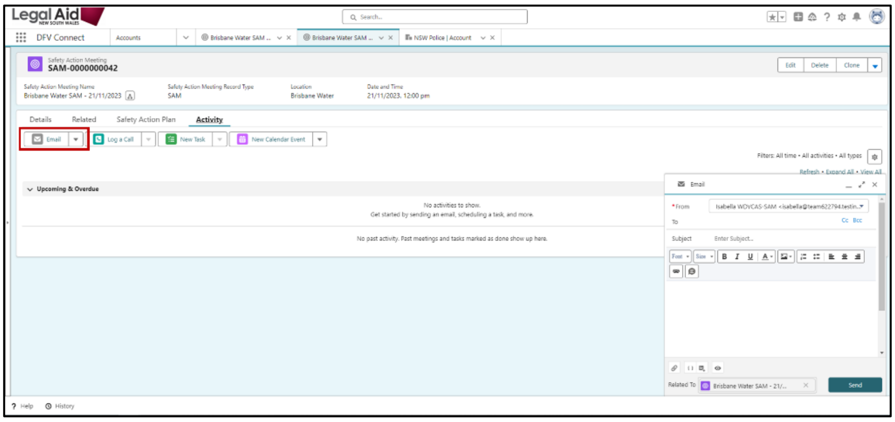
Safety Action Plan					
SAP Comments <SAP Comments>					
Contact Name	**Agency**	**Action**	**SAM Date**	**Action Due Date**	**Action Status**
<Contact Name>	<Agency>	<Action>	<dd/mm/yyyy>	<dd/mm/yyyy>	<Action Status>
<Contact Name>	<Agency>	<Action>	<dd/mm/yyyy>	<dd/mm/yyyy>	<Action Status>

Key	
	Client Account
	Referral
	SAM Case
	SAM

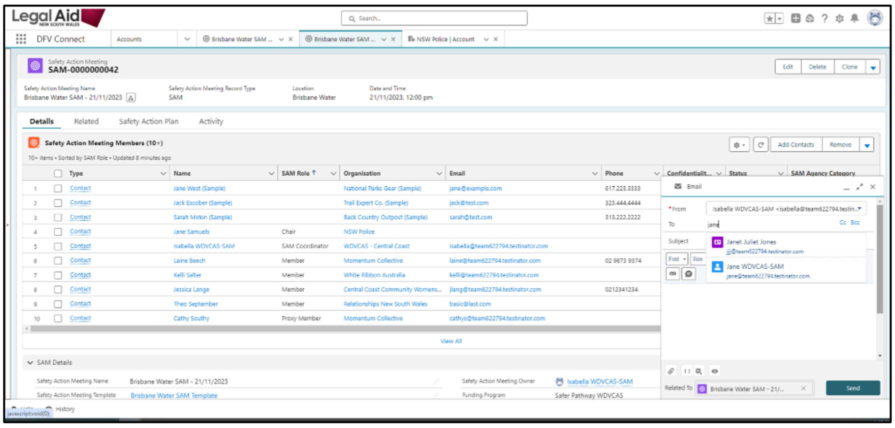
Process steps

Step	Description
1.	To generate the SAM agenda document, click on arrow in the top right-hand corner of the screen. Select **generate SAM document**. 
2.	Select generate document. 
3.	Select the SAM Agenda radio button. 

	Note: Both your SAM agenda and record of actions will be generated from information on your SAM record created as you will use this record before, during and after a SAM as a record of the SAM.
4.	Enter a document title and click **next**. 
5.	You can review the document in the system or if you need to make any formatting changes, you can download it and edit the document. To make these edits, select the **download word** option to edit the document generated. 
6.	If you have downloaded your document to make formatting edits, you can upload this back to your SAM and send the document from the system. To do this, go to the files section in your created SAM.

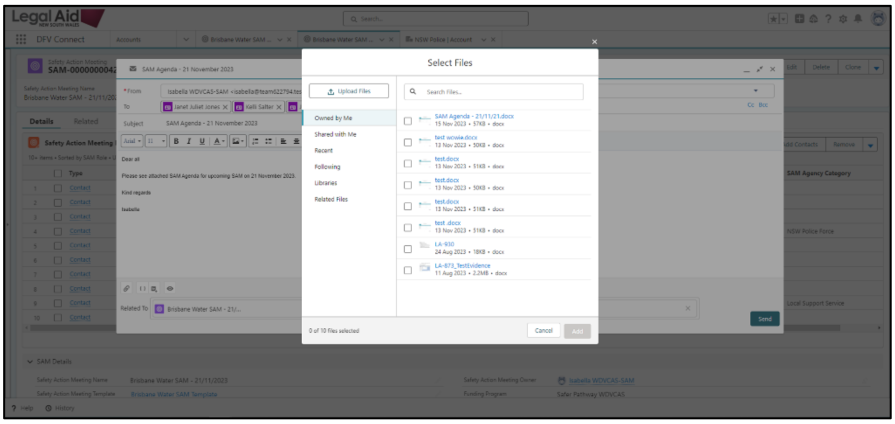
	Click on the arrow to the right of your file and **upload new version.** 
7.	Select the file to replace with the most correct version. 
8.	To send the SAM agenda to SAM members from the system, click on the activity timeline. To add SAM members, you can click on the **Details** tab to view their details while you are typing an email and populating the To **field** of the email. 
9.	Start typing their names into the ‘To’ field.

As the system has saved all your SAM members as contacts, their emails will populate as would when you are sending an email from your email domain.

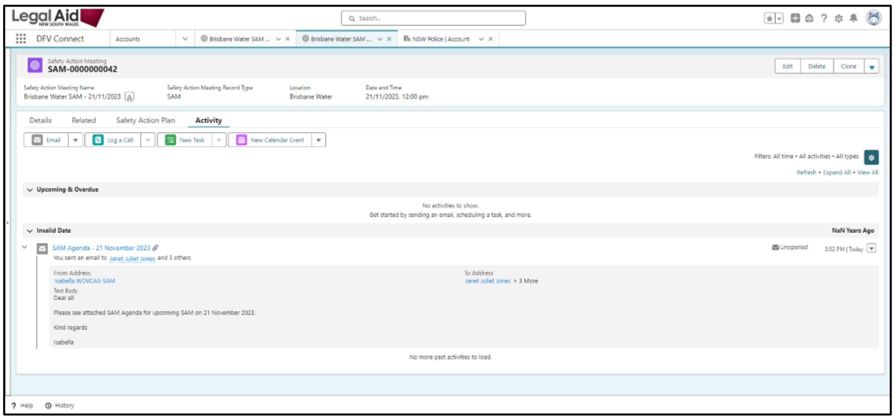


10. You can expand the email by click on the arrows next to the close icon.

To upload your SAM agenda, go to the paperclip icon. The system will display your most recently accessed files. Select file.

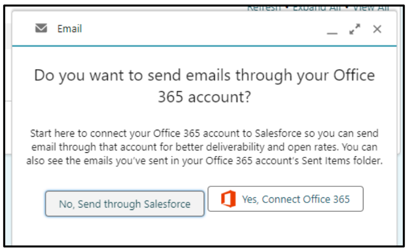


11. The record of the email sent will appear in the **activity** tab of your SAM.



Note:

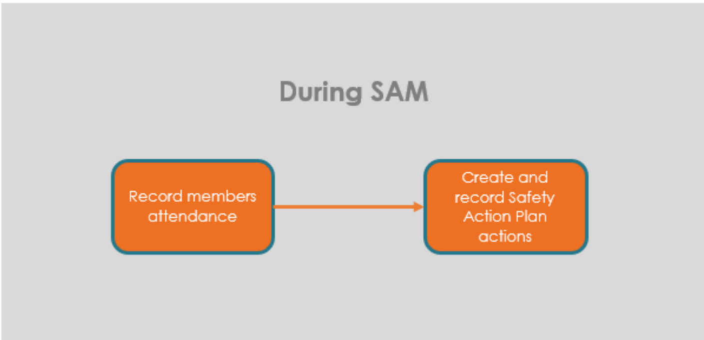
- When you first send emails from the system you will be asked to send emails through Office 365, select the No, send through Salesforce option as email is

	not integrated in the system.  • The email will be sent from noreply@salesforce.com on behalf of *your email*. • If the respondent hits reply, it will automatically populate with *your email* and the response will be received in your work inbox (not through salesforce).

During SAM

You can use your created SAM record during your SAM to:

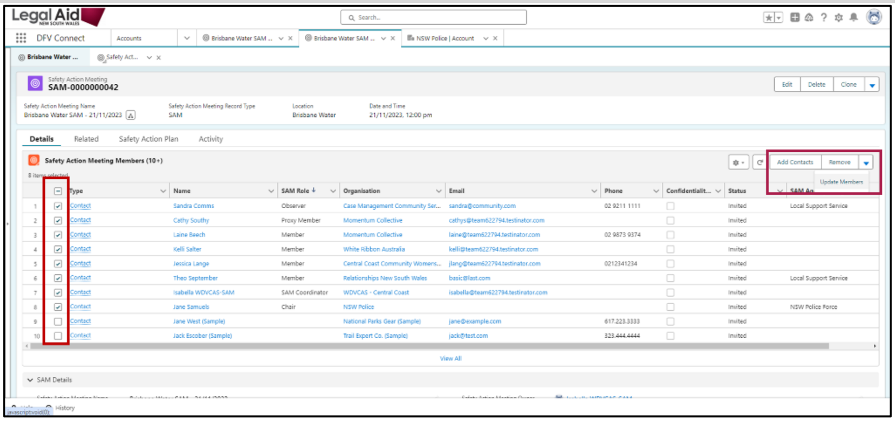
- Record Members' attendance and confidentiality agreements
- Create a Safety Action Plan and record actions for SAM members



Record members attendance

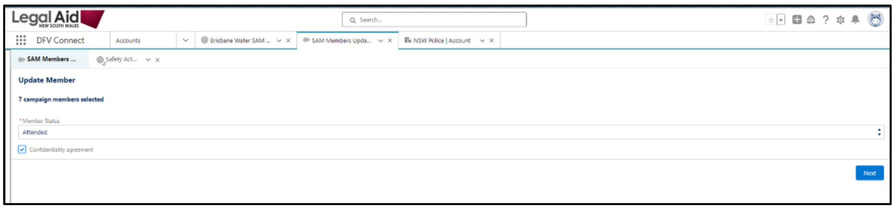
Process steps

Step	Description
1.	To bulk update SAM members attendance and confidentiality status, select the checkbox in the first column and then selecting 'update members' using the drop-down arrow in the top righthand corner.

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


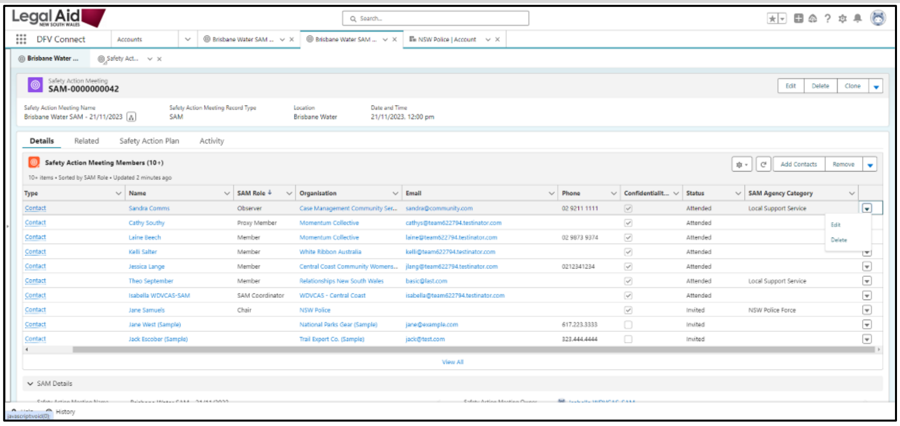
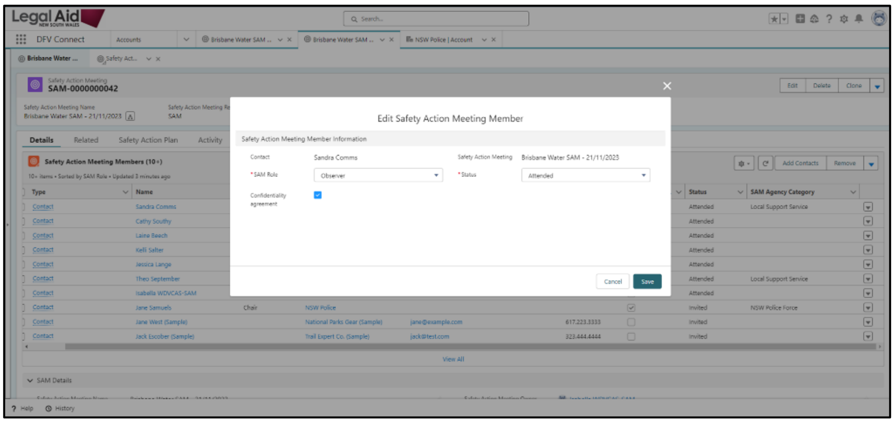
</td></tr>
<tr><td>2.</td><td>
Select the status of their attendance.

</td></tr>
<tr><td>3.</td><td>
And mark the checkbox for confidentiality agreement. To confirm, click next.



</td></tr>
<tr><td>4.</td><td>
Their attendance status and confirmation of confidentiality agreement signed will be updated.

If you need to mark certain members status, you can select the drop-down arrow next to the members name and edit to update their attendance status and confidentiality agreement status individually.
</td></tr>
</table>

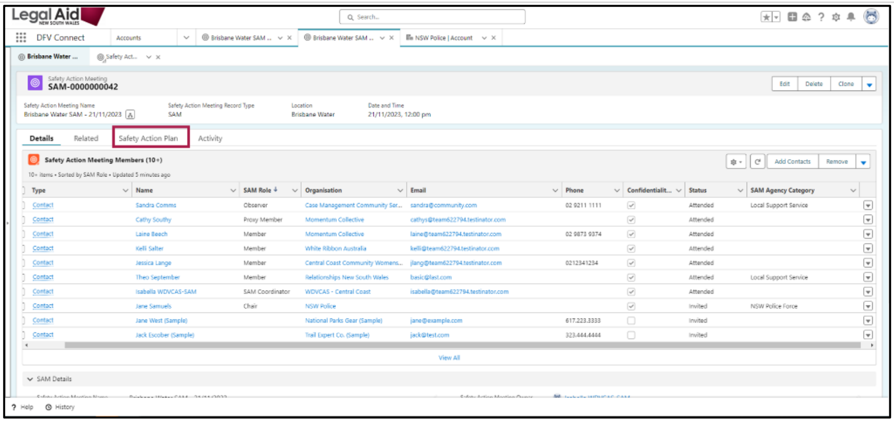
Step	Description
	
5.	Select save to update. 

Create SAP and add SAM Member actions

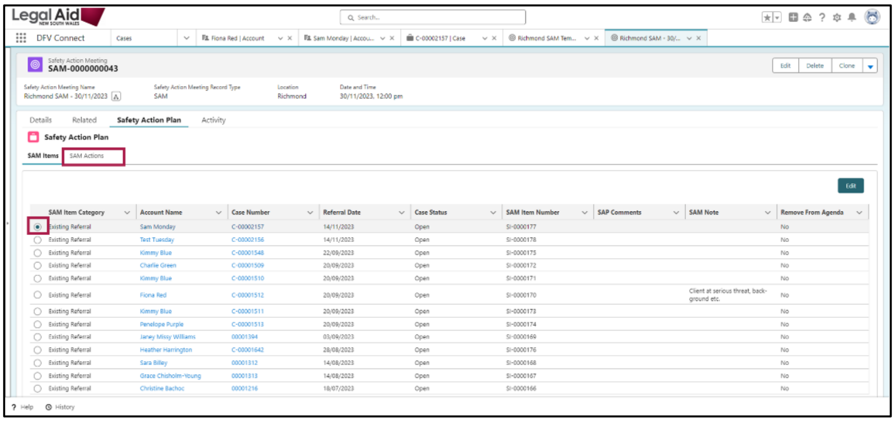
Once you have recorded members' attendance, you can create your safety action plans and add SAM member actions for clients listed from the SAM record.

Process steps

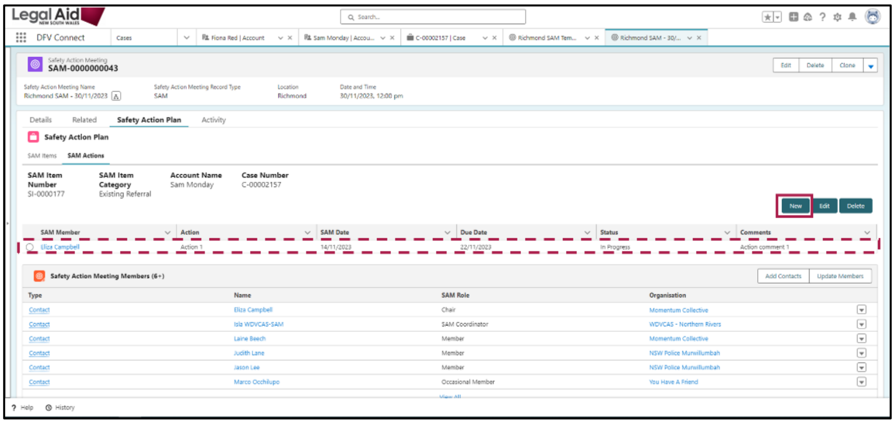
Step	Description
1.	Click on the Safety Action Plan (SAP) tab.



2. To add actions for your safety action plan, you can click on the radio button of the relevant SAM item. And then click on the SAM actions tab.

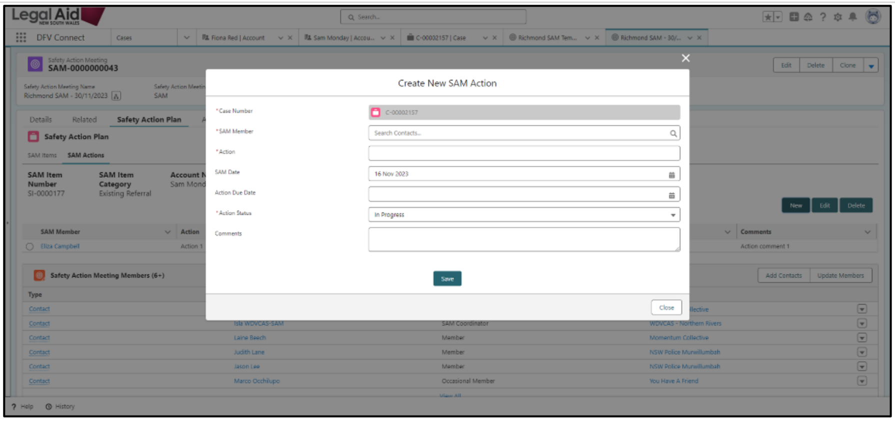


3. Any SAM actions added from prior SAMs, will be displayed. To add a new action, click on **New**.

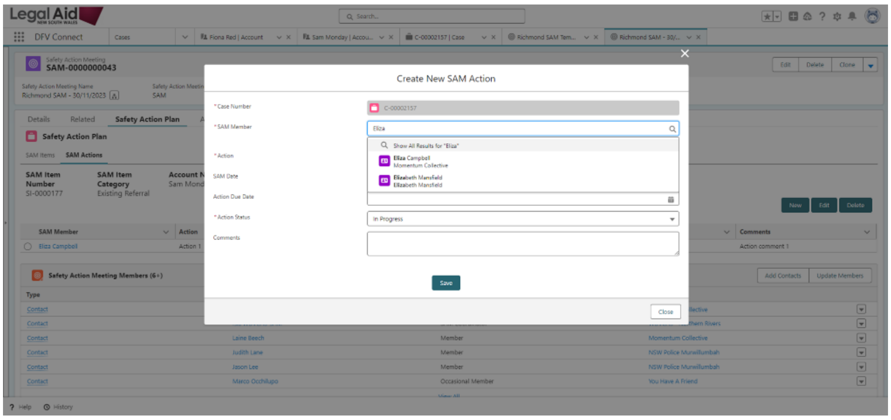


4. For each action, you will need to enter the SAM member's details and the action.

The SAM date will always default to today's date so if you are entering information at the SAM, then you will not need to change this information.

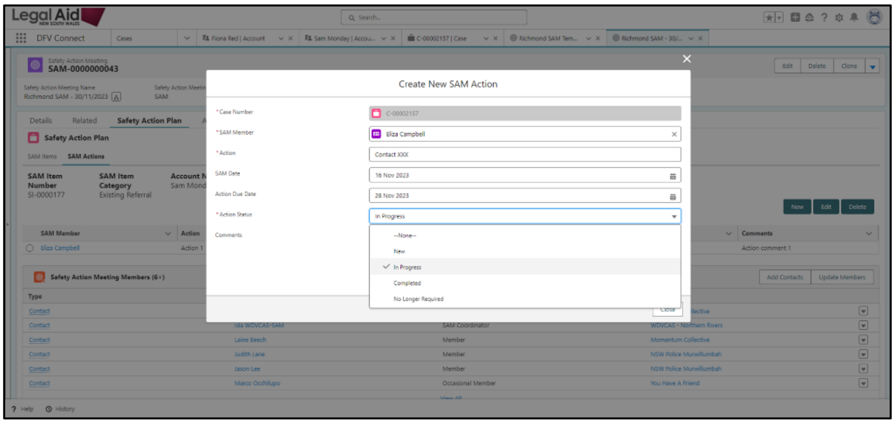


5. Search for the relevant SAM member and select their name.



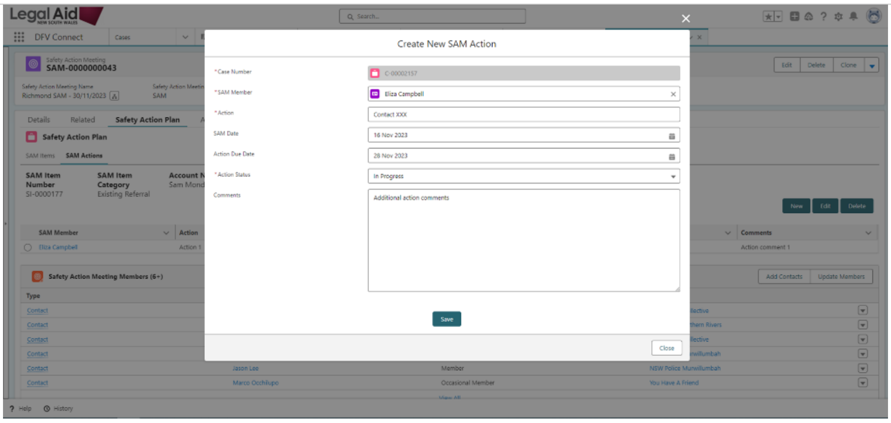
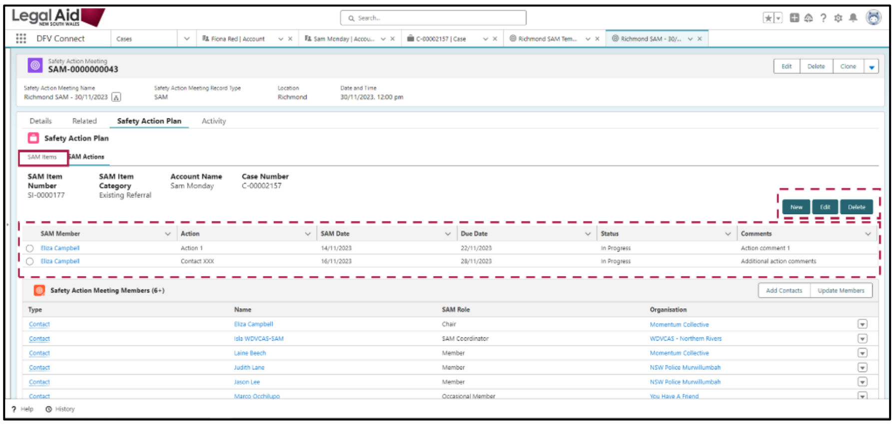
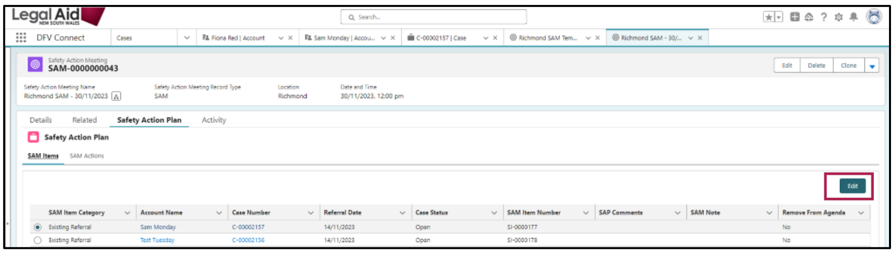
6. Type in your action, select the due date (for example, the next SAM date).

When entering new actions, the status will always default to **in progress**. You should mark actions as complete or no longer required as these are made.

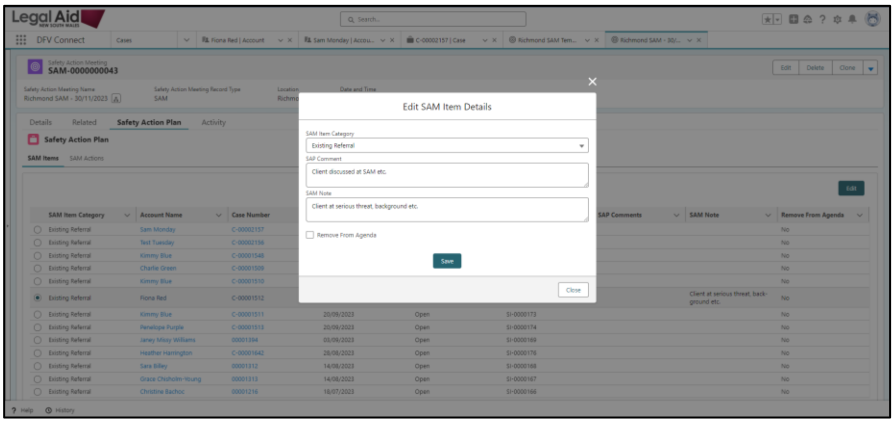


7. You can enter *additional* comments about the action if required, however we understand this may not be required as you can capture the action in the action field.

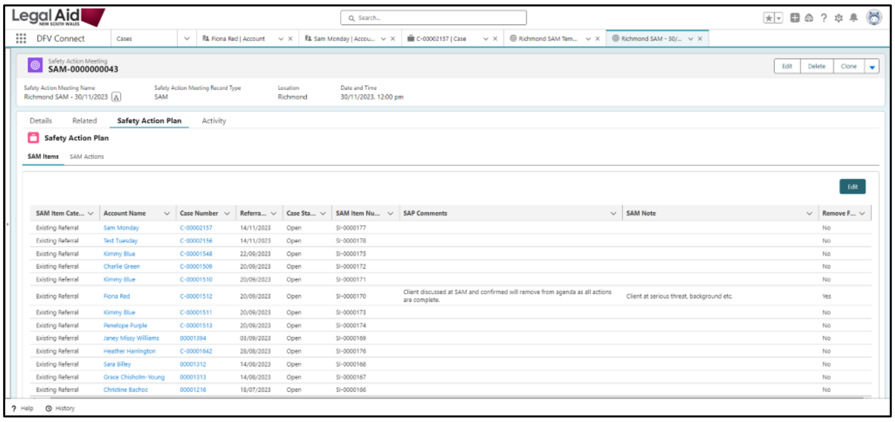
Once complete, select **Save**.

	 **Note**: The Action field has a limit of 255 characters and action Comments field has limit of 5000 characters. The comments field can be used if you need to make additional notes in relation to the specific action recorded.
8.	Once saved, you the action will populate into a table so you can easily view all SAM actions for each client listed on the SAM. For actions, you: • Can edit and delete actions if required. • Should update the action status so it is can be reported properly. To enter comments or information about the Safety Action Plan, go back to the SAM items tab. 
9.	Select the relevant SAM item and **edit**. 
10.	On the edit SAM item details tab, there are the below fields:

- **SAP Comments** field will be blank each time you add a SAM case to a SAM. This is where you can enter information about the client relevant to the SAM discussed.
- **SAM Notes** field will re-populate each time you add a SAM case to a SAM. This information is recorded in the Safety Action Meeting Notes field on the client's SAM case. If you make updates on the SAM case, this information will appear each time the SAM case is added to SAM.
- **Remove from** agenda checkbox can be selected where it is confirmed they will be removed. This information will populate onto the generated Record of Actions document. You will have to close the SAM case afterward as well.



11. The information will be populated so you can easily view this information about the client.

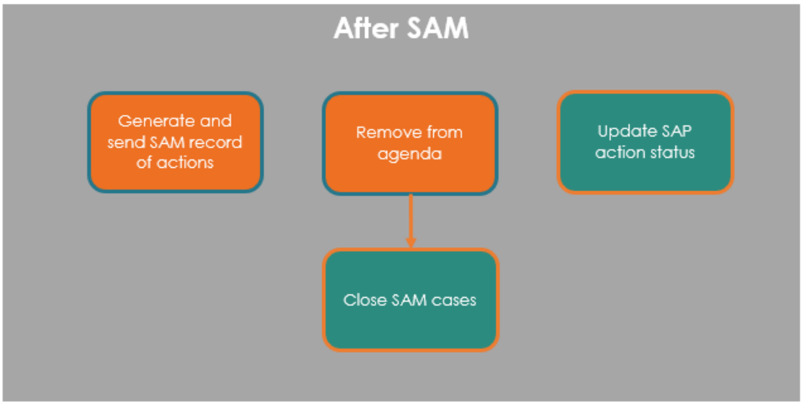


After SAM

After and outside of a SAM you will create a SAM record of actions to send to SAM members.

If SAM clients are to be removed from the agenda, you will also have to close the SAM case.

In DFV Connect, you can also review actions and update their status from the client's SAM case.



Generate SAM record of actions

Generating a SAM record of actions works similar to generate the SAM agenda document as these are both generated from the SAM created. All information recorded during the SAM (eg., members status and actions) will be populated onto the SAM record of actions document.

You should ensure all information is recorded on the SAM created so you have a complete record of the SAM within the system.

SAM record of actions example (existing referral)

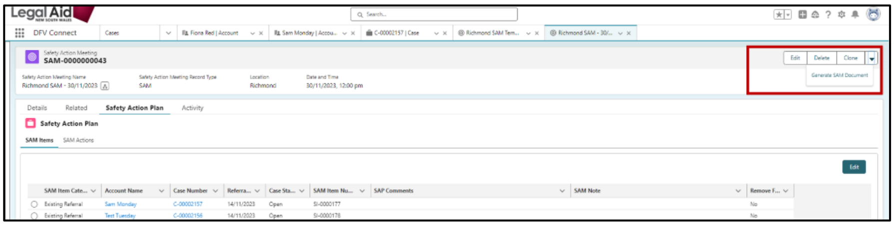
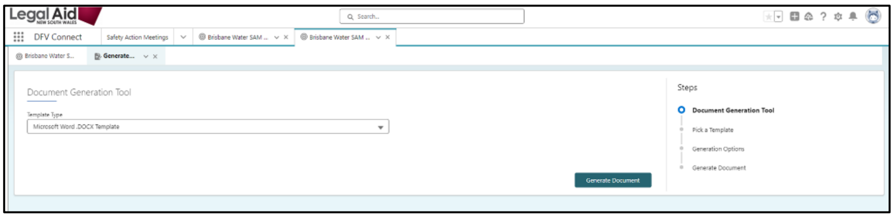
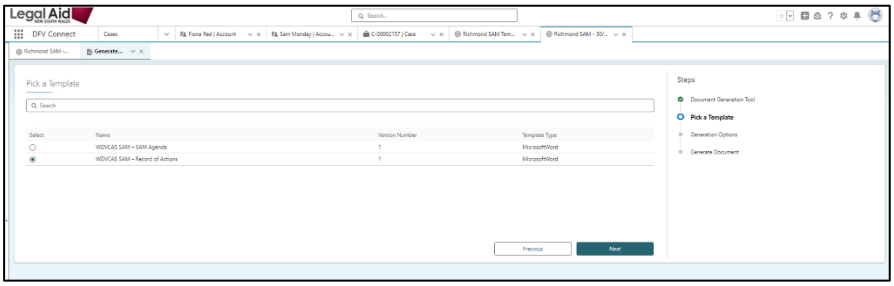
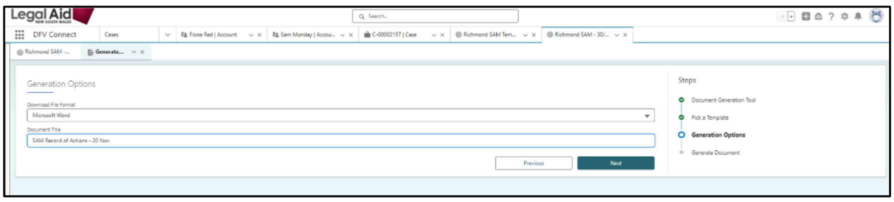
Below is an example of the information entered within the SAM.

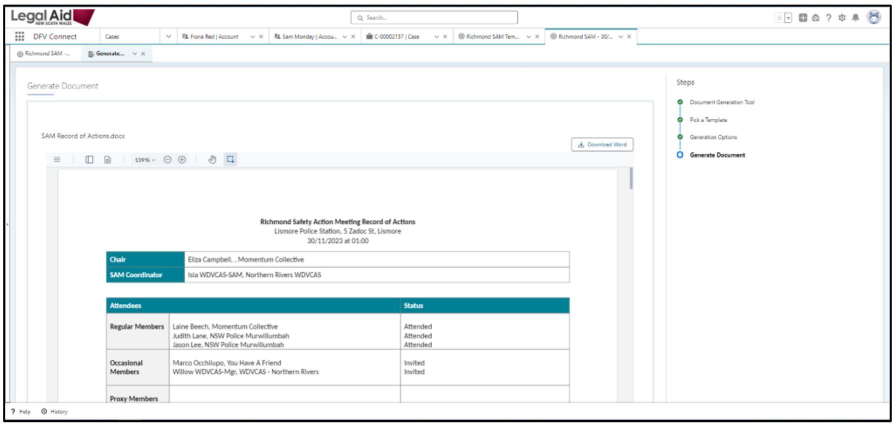
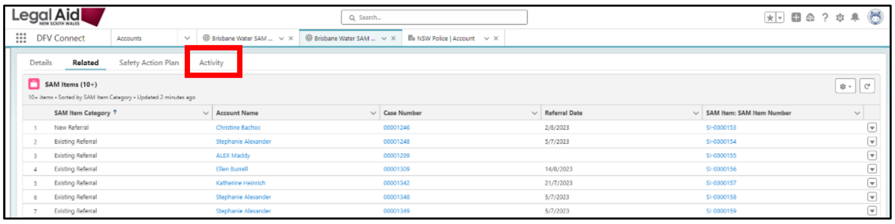
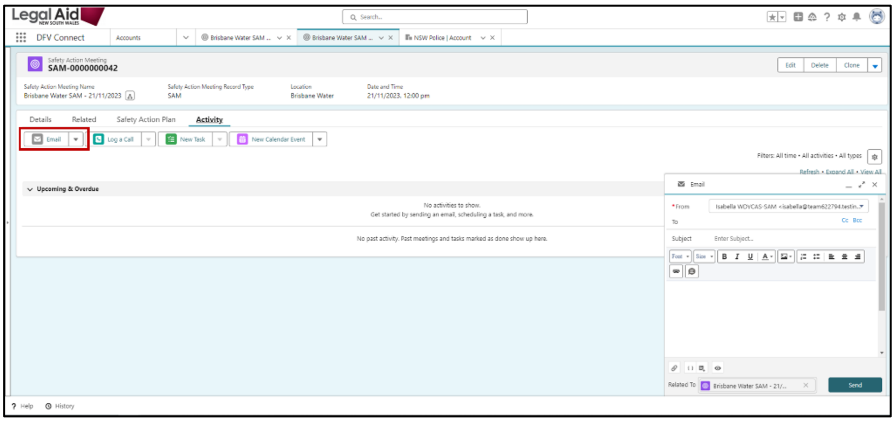
Existing referrals					
Fiona Red	DOB: 17/09/2023		Women (WDVCAS, FASS Female)		CNI: 333333333
33 Blackwattle Place Cherrybrook 2126 NSW			Aboriginal: N Torres Strait Islander: Y		Client consent to SAM: No
Date discussed at SAM: 30/11/2023			Current risk rating: Serious Threat		
Referral Information	**Dependent Children Information**		**Other Party Information**		
Referral Number: REF-0000000893 Organisation: NSW Police Byron Bay Event Number: 123457894871 Referral Date: 20/09/2023 Referrer Risk Rating: Serious Threat Incident Date: Incident Address: 23 Blackwattle Place Cherrybrook 2426 NSW			Terry Red DOB: 03/09/2004 CNI: 12345789ccda Address: Unit 32 456 Test Street Sydney NSW 2123 Relationship to client: Ex-partner of client's partner Aboriginal: N Torres Strait Islander: Y		
Notes / ADVO or bail conditions / Other Party custody status etc. Client at serious threat, background etc.					
Safety Action Plan					
SAP Comments Client discussed at SAM and confirmed will remove from agenda as all actions are complete.					
Contact Name	**Agency**	**Action**	**SAM Date**	**Action Due Date**	**Action Status**
Tester Testerson		TEST Action	10/11/2023	10/11/2023	Completed
Remove from SAM? Yes					

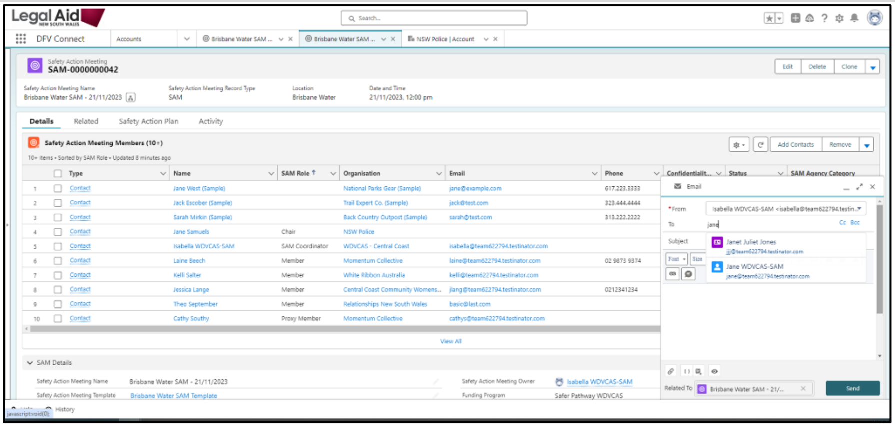
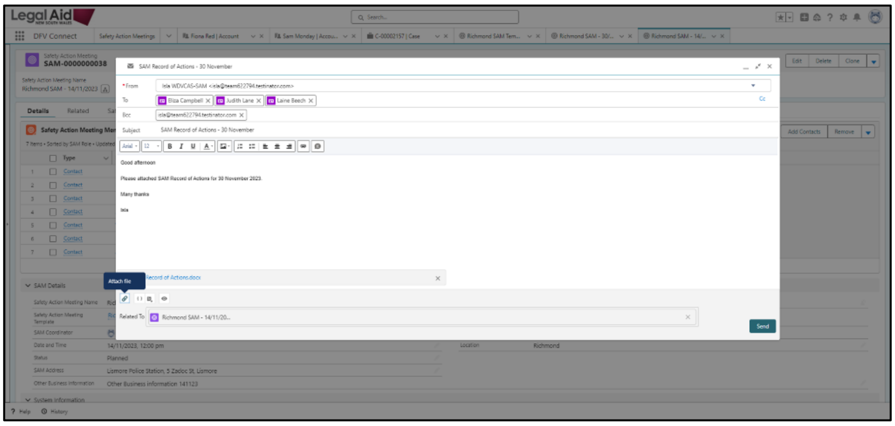
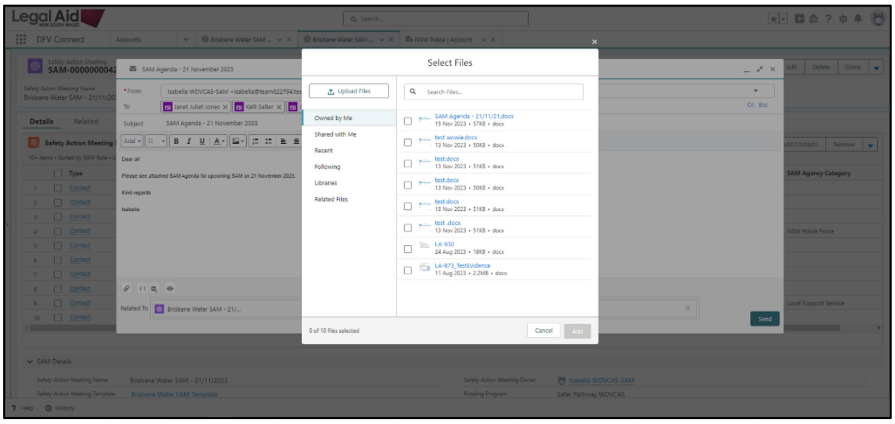
Field	How it is populated

Notes/ ADVO or bail conditions / Other Party custody status etc.	Generated from Safety Action Plan item and will also populate from the **Safety Action Meeting Notes** section on the SAM case.
SAP Comments	Generated from the Safety Action Plan item from the SAP Comments field. This will be blank each time an item is added to a new SAM.
Remove from SAM?	Will be marked as 'yes' if checkbox is selected.

Process steps

Step	Description
1.	To generate the SAM document in the top righthand corner. 
2.	Select **Generate Document**. 
3.	Tick the radio button next to the **Review of Activities** and select **Next**. 
4.	Enter a title and select next. 

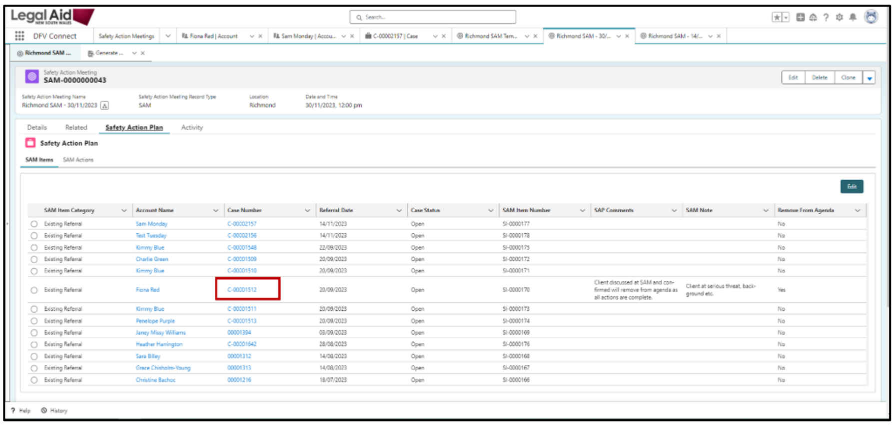
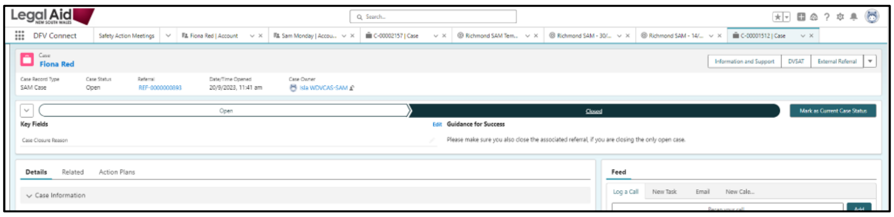
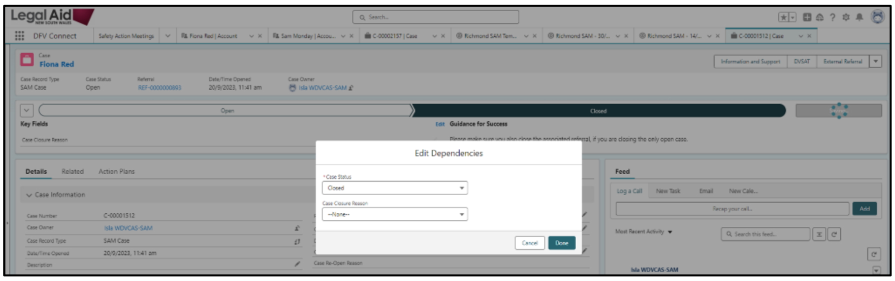
Step	Description
5.	You can review the document in the system or if you need to make any formatting changes, select **Download Word** to edit from your device. 
6.	Once you have confirmed all information is correct on your record of actions, you can send the email from the SAM. Click on the **Activity** timeline and access the email function. Click on the details tab to access your member list and click on the arrows of the email function to enlarge the screen. 
7.	Click on the Email button and the email will display in the right bottom corner. 
8.	To add SAM members, you can click on the **Details** tab to view their details while you are typing an email and populating the To **field** of the email.

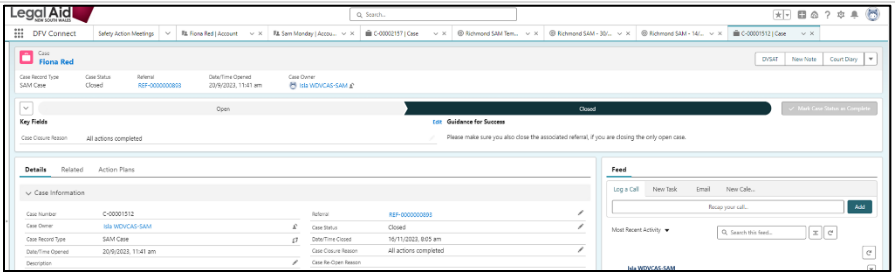
Step	Description
	
9.	To upload your SAM agenda, go to the paperclip icon. 
10.	The system will display your most recently accessed files. Select file and send the email. 

Close SAM case

For all clients that are to be removed from the SAM, you must also close their SAM case. You can access their case from the SAM.

Process steps

Step	Description
1.	To close a SAM case, you can access the relevant SAM case from your SAM. 
2.	On the case record, select the closed status and mark as current case status. If there are no other cases open for the client, you should also close the referral. 
3.	Select the closure reason and then select **Done**. 
4.	The status will updated to close. The case will no longer be visible from your **Service Area - Active SAM cases** list view so you will not be able to add the SAM case to SAM.

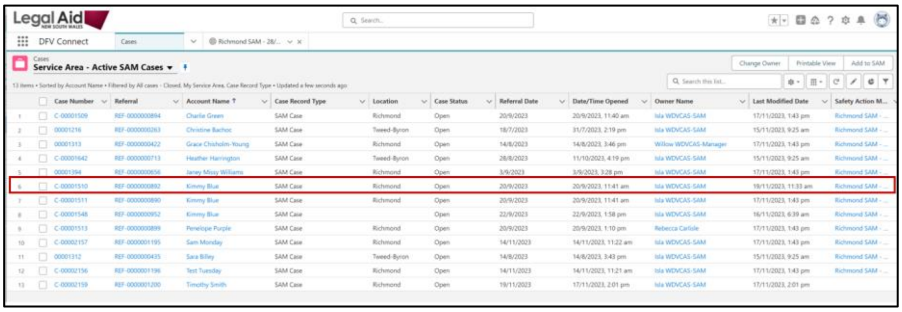
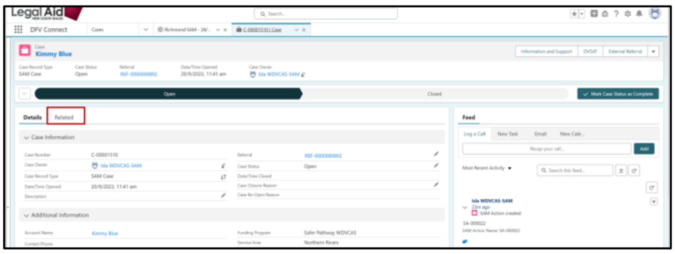
	

View and update SAP actions

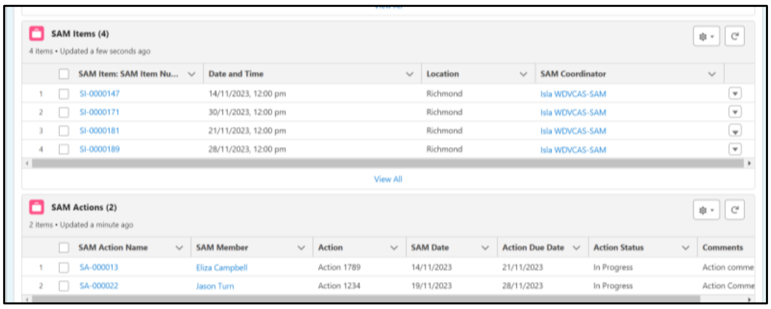
Outside of a SAM, you can also view and update SAP actions directly from the client's SAM case. This function may assist you if you need to update an action status outside of a SAM and/or quickly view your SAM client's actions.

Other workers from your service area will also be able to view these actions on the SAM case as they have access to the SAM case.

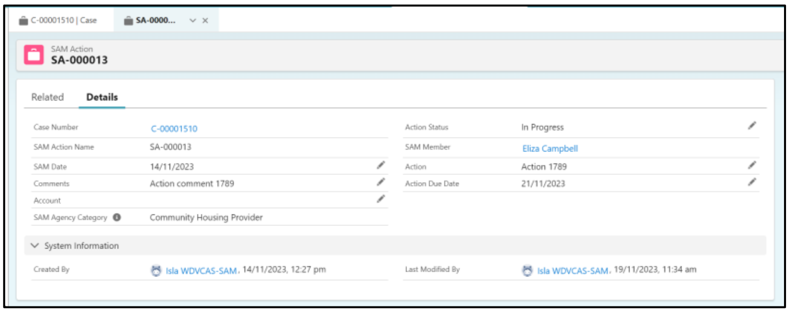
Process steps

Step	Description
1.	Go to your case list view to access SAM cases. Select the **case number** of the case. 
2.	From the case, go to the related tab. 
3.	All SAM items and SAP actions will be displayed. • SAM items: SAMs the client has been listed on • SAM actions: all actions created for each client.

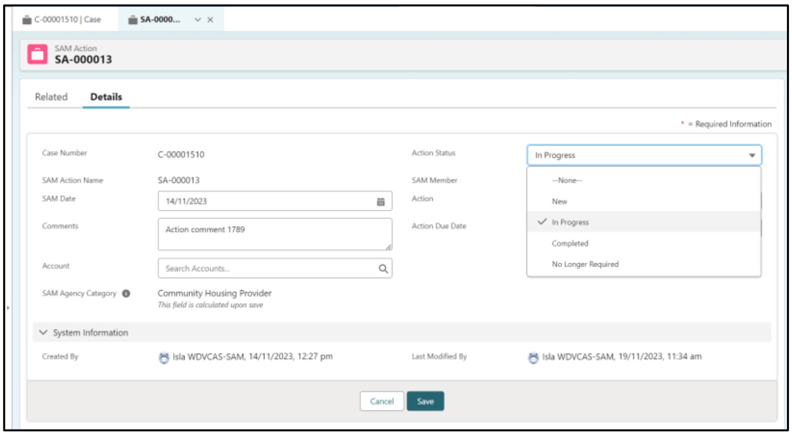
To update the action status, click on the SAM action name (number).



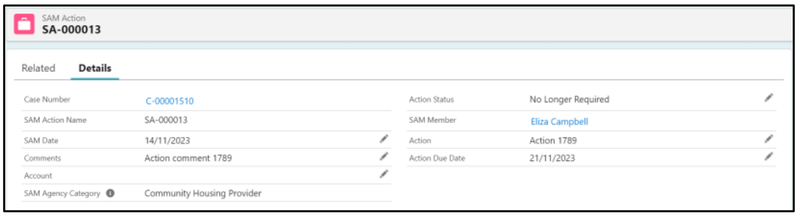
4. Select the edit (pen) thumbnail to edit the action.



5. Update the status and then select **save**.



6. The action status will now be updated. This information will populate onto your created SAM.



General Functions

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:

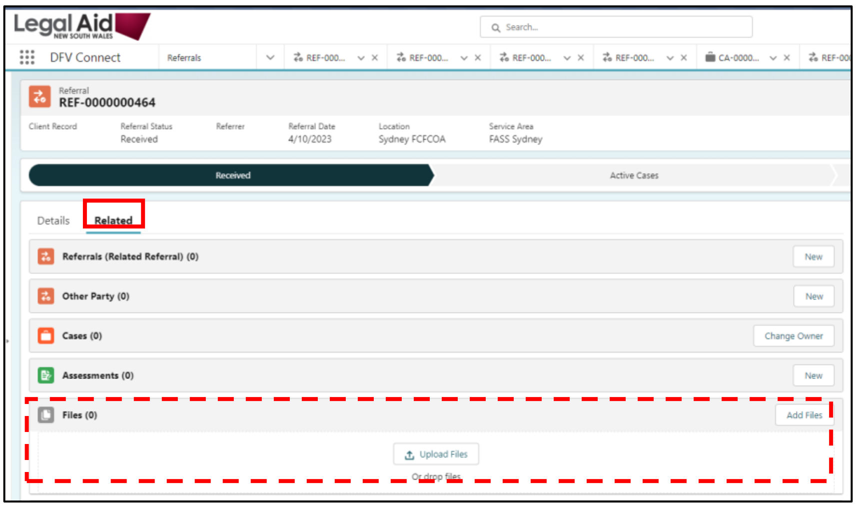
- Intake assessment
- File notes and
- DVSAT results etc.

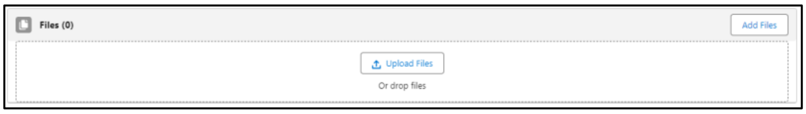
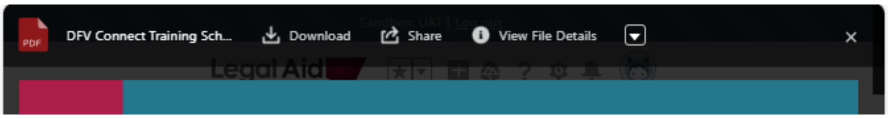
Almost all records in DFV Connect can be printed if a hardcopy is required (eg., at court). It is encouraged you only upload files only where necessary.

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. 

Step	Description
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. You are permitted to upload PDF, Word, Email, JPEG, PNG, or Excel files. The file size limit is 25MB. 
 	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. However, a copy of the most up-to-date ADVO can be uploaded if needed, by selecting ‘upload new version’. You may upload emails or letter templates that are edited or received from external providers, Child Protection Reports, and WDVCAS DVDS Form.
3.	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.

Log a call

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

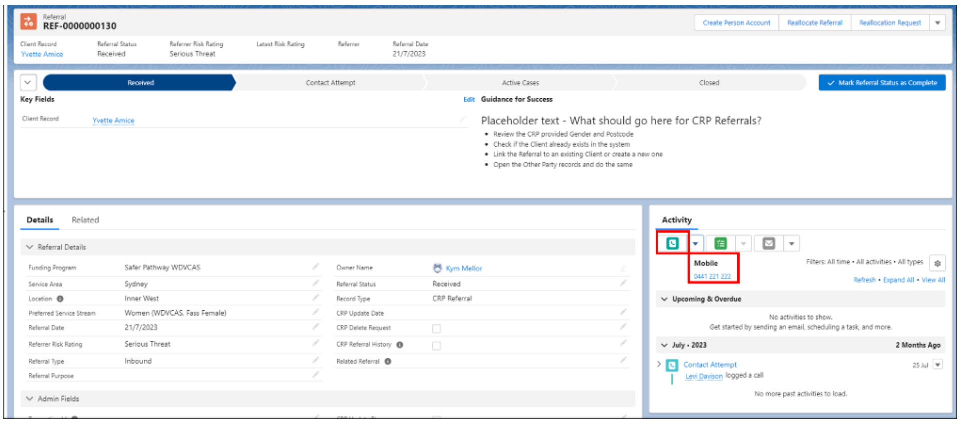
Use this transaction when you need to keep a record of contact, e.g. when you contact the client or referring person, or if you do a follow-up contact. For further information, refer to Process CRP referrals – Record Contact Attempts.

Do not record detailed conversations in log a call. Note only call made, outcome of call etc.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>3.</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**

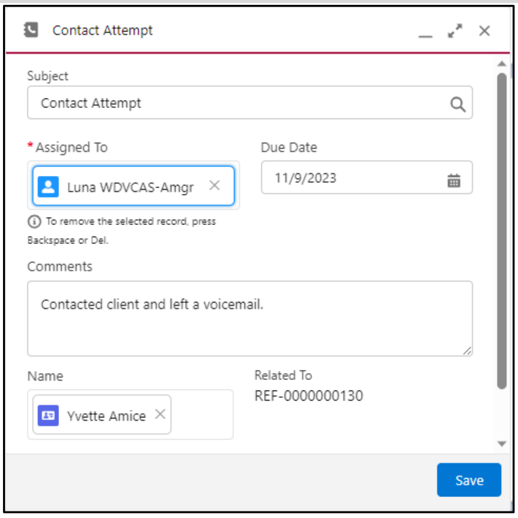


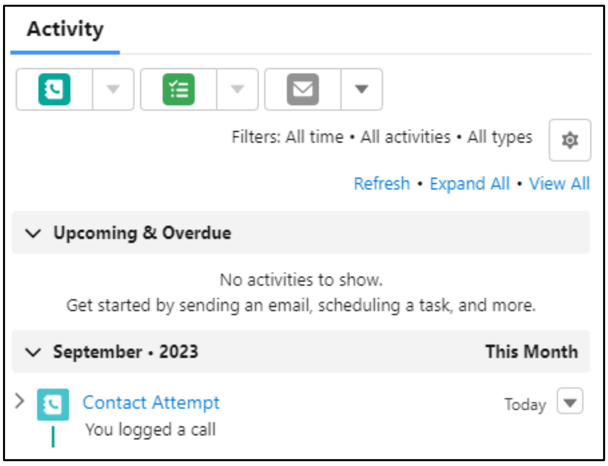
</td></tr>
<tr><td>4.</td><td>

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 todays date. You can add **Comment** and also, use the **Name** field to search for the details of the person you've contacted. Select **Save**.

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

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


</td></tr>
<tr><td>5.</td><td>
The Activity area of Referral record will display that the record that the call was logged.


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

Create a task

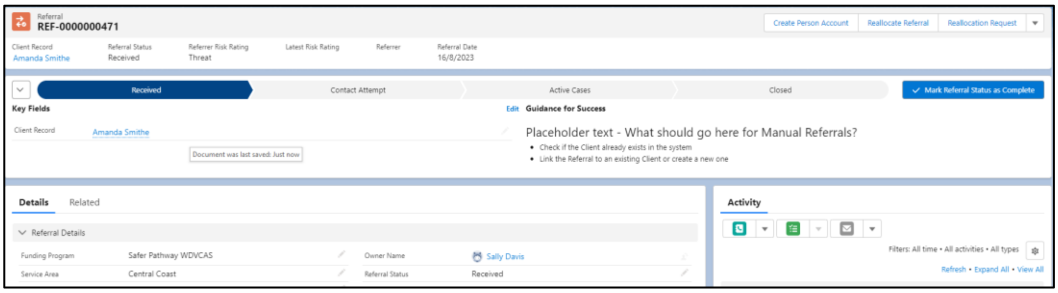
Tasks allow you to track activities as a to-do list in the application. You can relate tasks to specific referral or case records, and you can create single or recurring tasks.

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

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

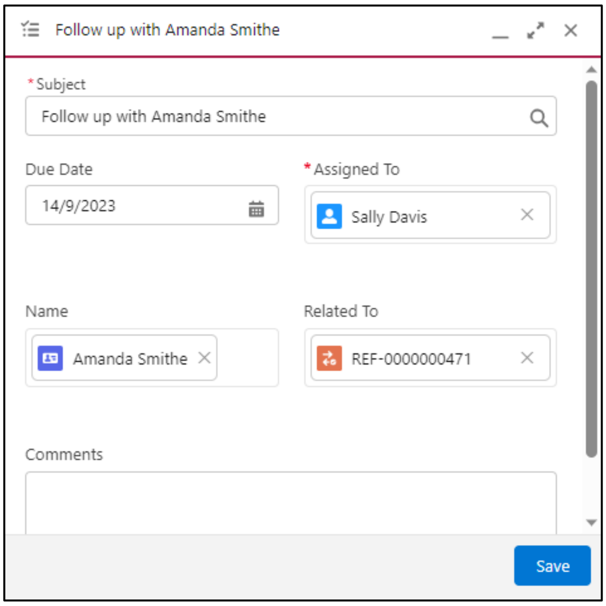
- **Case** screen, go to **Feed** area on the right-hand side and select **New Task**



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

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've contacted. Select **Save**.



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

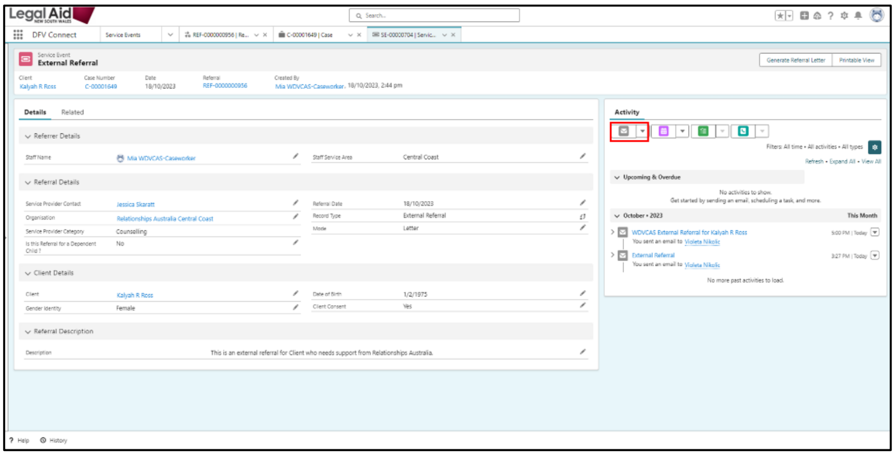
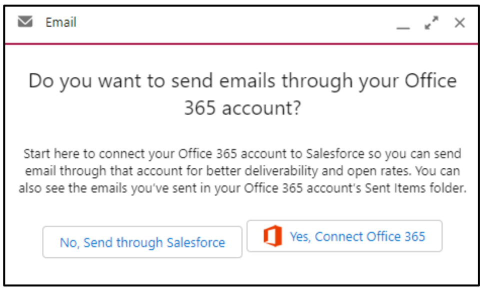
Send an email

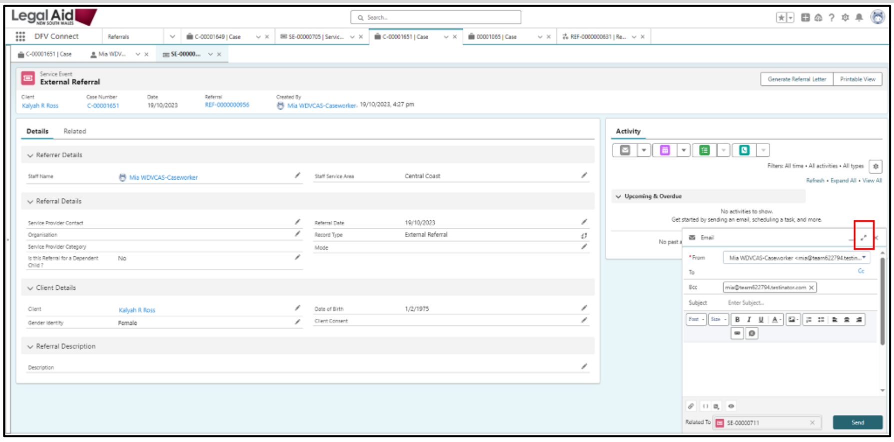
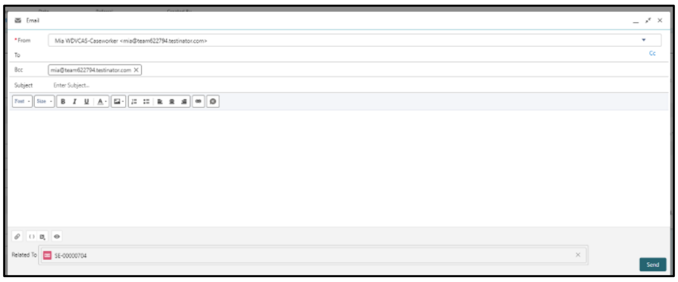
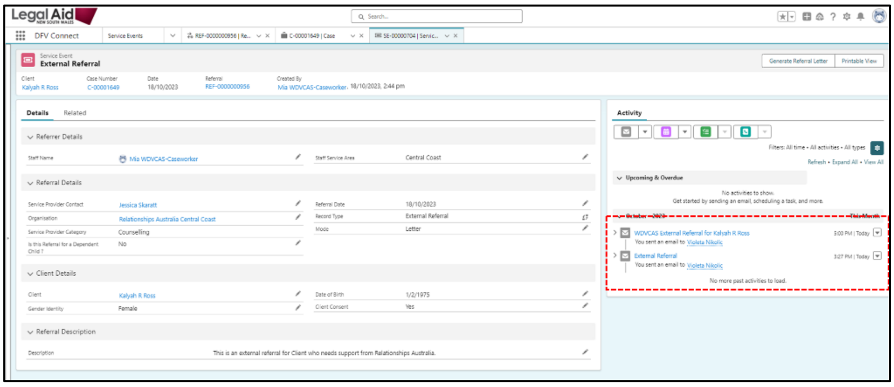
You can send emails from cases and service events created in DFV Connect to keep a record of services provided and ensure a record is kept within the system.

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.

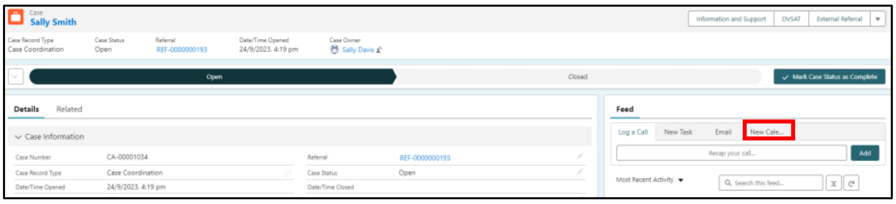
Process steps

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

Step	Description
	
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. 
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.

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

Create events (appointments) and set reminders

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>From the Case, in the Feed section, click on New Calendar Event

</td></tr>
<tr><td>2.</td><td>The Assigned To field will have you selected by default. You can change this to another 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

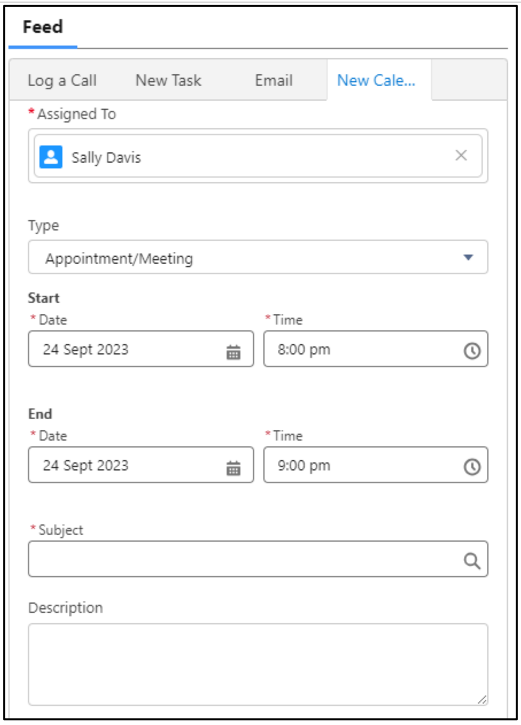
Select a Subject

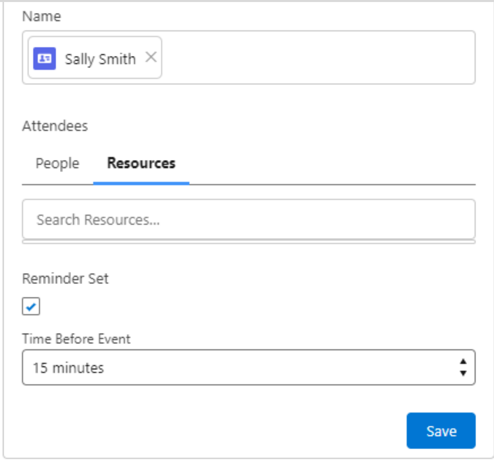
Enter a Description

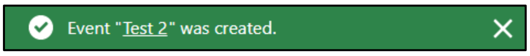
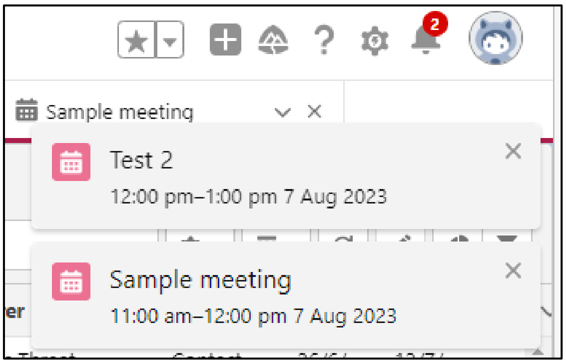
The Name of the Client should be pre-populated.

Under Attendees you can add more People – the event will appear on their DFV Connect event calendar (not in their personal calendar like Outlook)

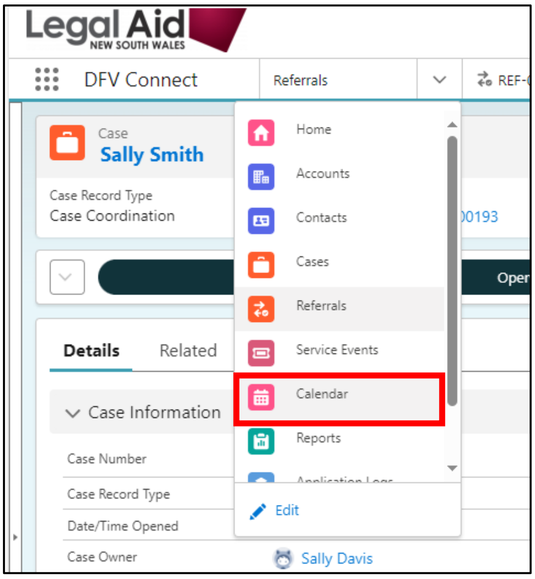
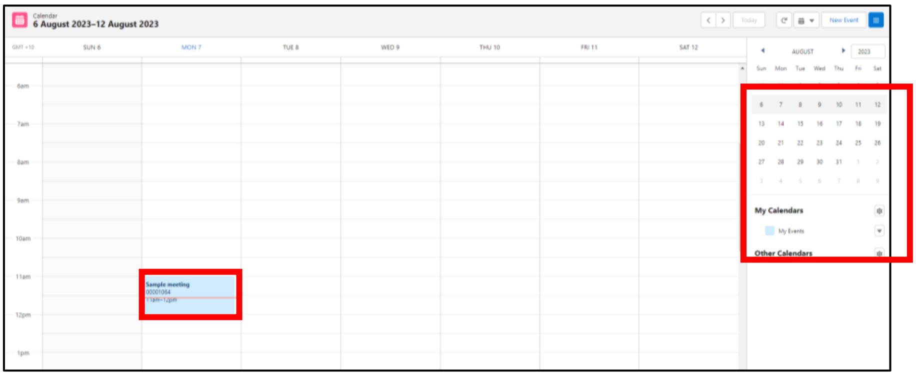
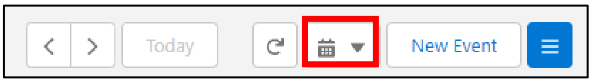
Record any Resources if required.

If you wish to set a reminder, tick the Reminder Set checkbox and select the</td><td>
</td></tr>
</table>

Step	Description	
	Time Before Event that you would like to be reminded (default is 15 mins prior) Click **Save**	

3.	The *Event "<u>Meeting Name</u>" was created* pop-up will display to confirm that it has been saved 
	Events (appointments) will be saved in your DFV Connect Calendar, they **<u>do not</u>** 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:  Click on the x to close it.

View event 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 it's details. Use the Monthly calendar on the right hand-side to select a specific date or week. 
	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. 

Print for offline working

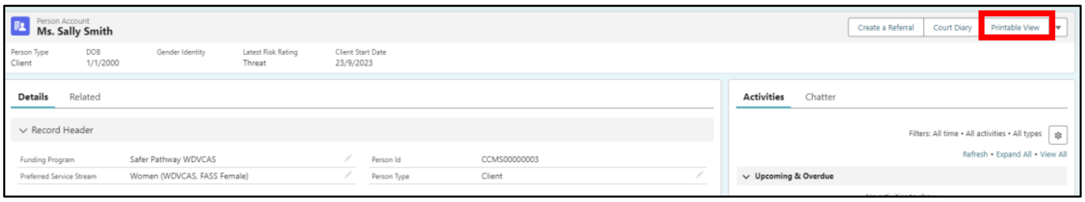
You can print a document that includes all of the relevant information that you might need to take to court, in particular where you will not have access to a laptop or WiFi at the courthouse. From the system, you can separately print the Person Account record, Referral record, and any Service Event.

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

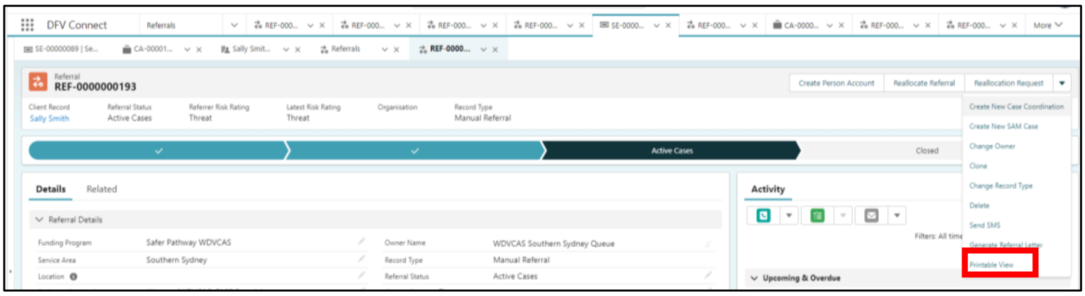
Note	Description
Subpoenas	• WDVCAS records may be the subject of subpoenas. A WDVCAS Manager should obtain legal advice before responding to a subpoena (refer to the WDVCAP Policy & Procedure Manual) • If advised to provide documentation after legal advice WDVCASs can print and then redact necessary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

Step	Description
1.	Print Person Account

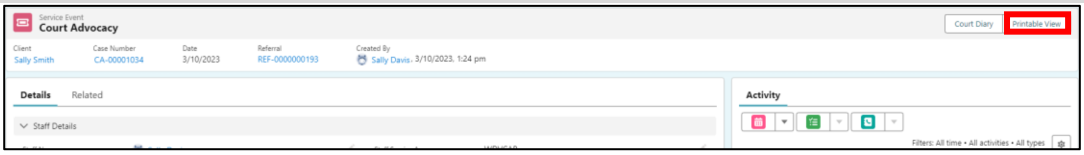
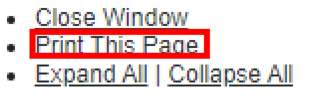


Note: this screenshot shows printing the client record. You can also print the Other Party or Child Dependent Account in the same way if required.

Print Referral



Print Service Event

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

Appendix

Templates

- Access and Delete Form
- WDVCAS Court Advocacy Service Event template (word doc)