Activating New Service User on SRS Guidelines

1. Purpose

The purpose of this document is to provide the Inala Community House (ICH) Family Intervention Services (FIS) workers with guidance about how to create or activate an existing client profile on SRS and record all documentation as part of the referral process.

2. Scope

These Guidelines apply to all employees, contractors, students and volunteers within ICH FIS. For the purpose of these guidelines, these persons shall be referred to as workers.

3. Definitions

Child is an individual under 18 years (*Child Protection Act 1999*).

The Department refers to the Queensland Government Department responsible for Family Services programs and/or Child Protection or Child Safety.

Service User is any parents or family, or carer named in the referral for whom services will be provided, including children.

SRS – ICH record management system where all case related information is stored.

FIS SRS Profile – this is the profile within SRS which is opened and maintained during the period of intervention with a service user for the purposes of recording all client related information.

4. Guidelines for initiating a profile

The ICH FIS Worker is responsible for creating (or activating an existing) client profile on SRS and recording all documentation provided as part of the referral process.

The establishment of an active FIS Client profile is the first activity to be undertaken by the ICH FIS Case Worker upon being allocated a case.

The following steps outline the process for activating a new service user:

1. Search primary service user's full name under the 'persons' tab in SRS to see if they have an existing file. If a match appears, ensure the date of birth is the same. If a profile already exists for the client, check the below steps to ensure all the details are correct and current and update as needed.
2. If no matches were found, click the 'add new client' button and add all known service user information, which can be found on the FIS referral. Of particular importance is whether they identify as Aboriginal or Torres Strait Islander or Culturally and Linguistically Diverse. Ensure to detail their culture and language if this applies.
3. Once the profile has been created, click on the 'create new relationship' button and add each person listed on the referral who has a key relationship to the adults who

have been referred (for example, add partner or ex-partner, daughter or son). As you add a person, check that this person is not already on SRS.

4. Click on the 'create new profile' button to create FIS profile.
    a. Multiple tabs will appear which can be clicked through to add all known information.
    b. Under the referral tab, 'legal 'order' refers to a court order such as a STC order. Date of parent's agreement to support can be found on the referral.
    c. Under 'family details', family willingness/ability does not need to be completed.
    d. Under 'children', the schools section does not need to be completed.
    e. Issues – completing using details available at referral stage
    f. Risks - completing using details available at referral stage AND maintain currency of information throughout the intervention
    g. Services - completing using details available at referral stage
    h. The 'closure' section does not need to be completed. This will be done upon the family exiting the FIS service by the ICH FIS Manager.
5. 'Create new address' to add the referee's current address and any other addresses which may be relevant to working with the family. If there is more than one address, clearly note in the comment's section whose address it is.
6. 'Create new e-contact' to add phone numbers and email addresses for relevant people, noting whose contact it is if including multiple people's contact details.
7. 'Create new key worker' to add yourself as the case worker. Then create another new worker and change the worker to 'other' and type in the Child Safety Officer's name, their service centre (eg Inala CSSC) and add their email address in the comments section. Repeat this step to add the Child Safety Senior Team Leader as well.
8. If there are any known risks working with the family, put this under the 'alert' section of the profile and advise in detail what the risk is, how it is being managed and which family member's it applies to.
9. Navigate to the 'documents' section of the profile and add all the referral documents, with the FIS referral being the first document uploaded. To upload, click on the 'create new document' button, select document type as 'attachment' and click save. From here, you can select your document and save to upload it to the server. Save the FIS referral as the first document and then the order of other documents is not important. You will need to save the document from the email to files and then upload to SRS. The documents should be named in the correct format (see document naming guide which is contained in the Case Noting Guidelines procedure).
10. Navigate to the 'case notes' section of the profile and copy and paste the initial referral email from the CSO and any further correspondence regarding the case. Record the time it took to create profile under case work.

5. Maintaining the profile

The ICH FIS Worker is responsible for maintaining current information in the profile. In particular, ensuring that the service users address and contact details are current, the key worker details are up to date.

To add new details to any of these fields on the View Primary Details screen, click on the blue tab to the right of the screen to 'create' new details and follow the prompts. Where information is not out of date and needs to be removed from the Primary View Details, click on the outdated information which will appear in blue text. A side bar will pop up allowing an end date to be added and a yes / no option to indicate if this is the current contact/worker.

6. Review

This guideline shall be reviewed every three years.

7. Related Documents

Policies and Procedures

ICH FIS Philosophy
ICH FIS Acceptance and Referral Policy
ICH FIS Acceptance and Referral Procedure
ICH FIS Case Management Policy
ICH FIS Case Management Procedure
ICH FIS Case Noting Guidelines

References
Child Protection Act 1999 (Qld)
Qld Human Services Quality Framework
Investment Specifications

Other
SRS