



St Vincent de Paul Society

CANBERRA/GOULBURN

*good works*

St Vincent de Paul Canberra/Goulburn

# CDS

# HOW TO

# GUIDE

This document provides instructions on how to complete the required tasks in CDS

## Table of Contents

Log into CDS .....	3
Set up Multi-Factor Authentication .....	5
Create a New Companion File.....	9
Search for a Companion.....	13
Update Companion Information.....	15
Create an Emergency Relief Entry .....	16
Record Assistance Provided .....	18
Create a Companion Event .....	22
Generate a Client Event Report .....	24
Add a Referral to a Companion File .....	26
Generate a Call List .....	28
Generate a Conference Statistical Report .....	29
Generate a Regional Statistical Report .....	30

## Log into CDS

<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to log into CDS
<b>Procedure</b>	<b>Log into CDS</b>

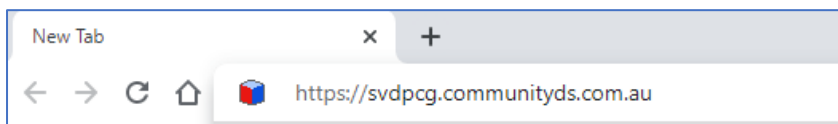
CDS is a cloud-based Client Record Management (CRM) software developed by Community Data Solutions (CDS). It can be accessed anywhere you have an internet connection.

CDS is used to record companion demographic information, requests for assistance, outcomes of the requests and other important information.

The data that is entered into CDS is also used for Government reporting and obtaining statistics for organisational purposes such as the Annual Report and funding applications

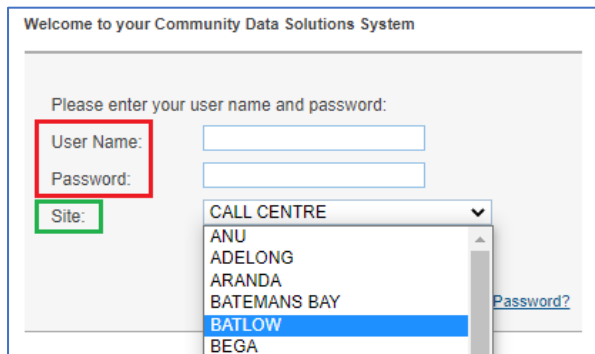
### **Step 1.**

Open your internet browser and type <https://svdpcg.communityds.com.au> in the address bar



### **Step 2.**

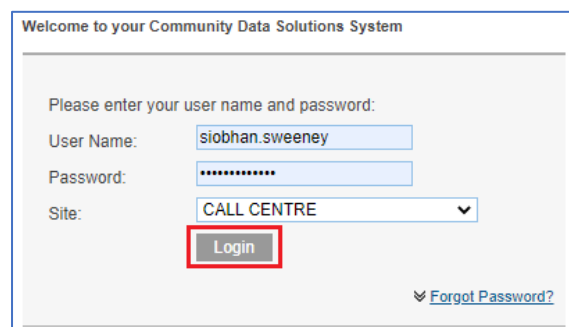
The CDS login screen will open

A screenshot of the CDS login screen. The title is 'Welcome to your Community Data Solutions System'. Below the title, it says 'Please enter your user name and password:'. There are three input fields: 'User Name:', 'Password:', and 'Site:'. The 'User Name:' and 'Password:' fields are highlighted with red boxes. The 'Site:' field is a dropdown menu with 'CALL CENTRE' selected. A list of sites is shown below the dropdown: ANU, ADELONG, ARANDA, BATEMANS BAY, BATLOW (highlighted in blue), and BEGA. There is a 'Password?' link to the right of the dropdown.

Enter your **Username** and **Password**

Select your Conference from the **Site** drop down list

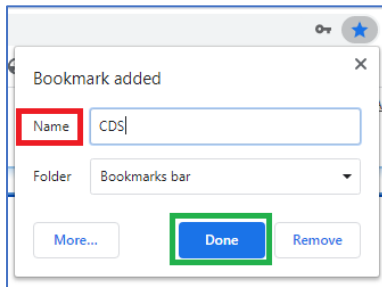
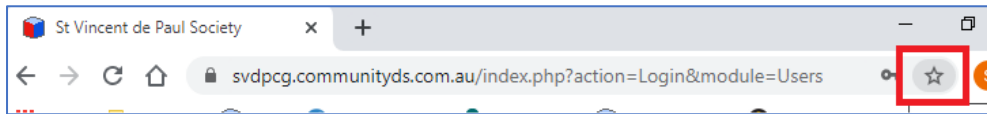
### **Step 3.**

A screenshot of the CDS login screen. The title is 'Welcome to your Community Data Solutions System'. Below the title, it says 'Please enter your user name and password:'. There are three input fields: 'User Name:', 'Password:', and 'Site:'. The 'User Name:' field contains 'siobhan.sweeney'. The 'Password:' field contains '\*\*\*\*\*'. The 'Site:' field is a dropdown menu with 'CALL CENTRE' selected. A red box highlights the 'Login' button. There is a 'Forgot Password?' link at the bottom right.

Once you have entered your details click **Login**

#### **Step 4.**

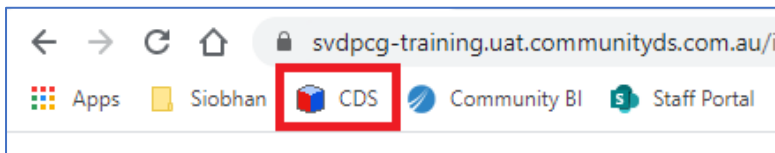
If you want to save the link for easy access you can click on the **Star Icon** on the right had side of the address bar



Change the **Name** to CDS

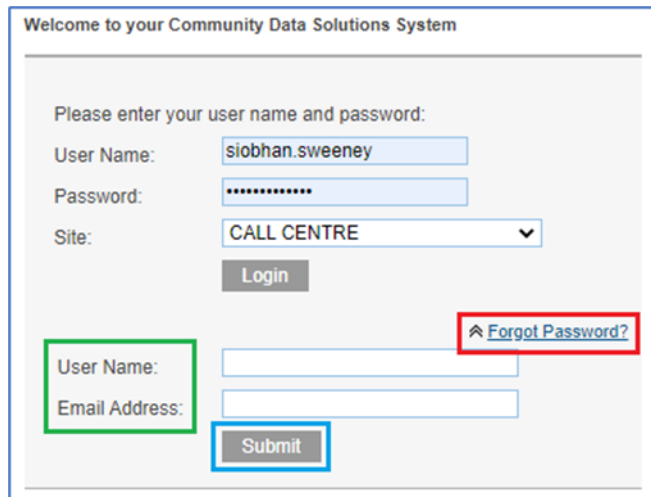
Click **Done**

The link will then appear in the Bookmark Bar. You can click on this link for easy access



**Want to change or have forgotten your password?**

#### **Step 1.**



Click on the **Forgot Password** link

Enter your **User Name** and **Email Address**

Click **Submit**

An email will be sent with instructions on how to reset your password.

If you have any difficulties, please contact Conference Support on 6282 2722 or [Conferences.CG@vinnies.org.au](mailto:Conferences.CG@vinnies.org.au)

## Set up Multi-Factor Authentication

<b>Updated</b>	25/11/2022
<b>Purpose</b>	To instruct the user how to set up 2 factor authentication in CDS
<b>Procedure</b>	<b>Set up Multi-Factor Authentication</b>

Multi-Factor Authentication (MFA) also known as 2-factor authentication, is to be enabled on individual user accounts to provide an increased level of security.

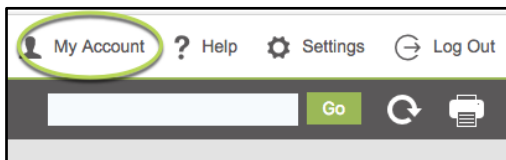
Users can only enable Multi-Factor Authentication (MFA) on their own user accounts.

When setting up Multi-Factor Authentication, there are 2 options you could use.

You only need to pick 1 of the options listed below to set up Multi-Factor Authentication (MFA)

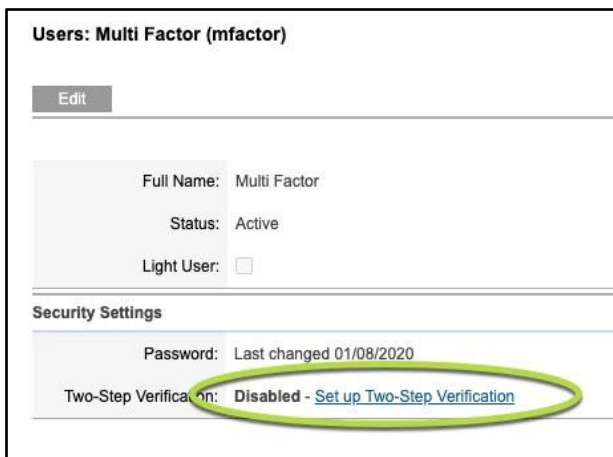
### **Step 1.**

Log into CDS and click on My Account in the top right-hand corner of the screen



### **Step 2.**

Click Set up Two-Step Verification



### **Step 3.**


You will be given 2 options –

**Users: Test Test (test.test): Set up Two-Step Verification**

To set up Two-Step Verification please choose from one of the methods below:


---

**Option #1: Via a Two-Step Verification Application**

 This is the recommended method. Temporary verification codes will be generated by a Two-Step Verification application on your mobile device. No cost as applications are typically free to install and use (e.g. Authy, Google Authenticator).

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**Option #2: Via SMS**

 Temporary verification codes will be sent via SMS to your mobile phone number. Costs may be incurred by your organisation.

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**Option #1 Via a Two-Step Verification Application**

Open your Authentication app on your device. Find the 'Add account' or similar option in your app.

Use your device to Scan the QR code displayed on your screen.

Note – if the QR code is not recognised, you can enter the displayed code manually

**Step 1: Install a Two-Step Verification application**


Install an application on your mobile device that supports Two-Step Verification, such as:

- Authy
- Google Authenticator

---

**Step 2: Set up Two-Step Verification**

From within the application either scan the QR code below or enter the following code: **GadfaInr3974w**




---

**Step 3: Verify Two-Step Verification**

Enter the verification code that appears in the application into the field below then click the Verify Code button:

Verification Code:

On your app, enter any required details and save the account.

A token will be displayed in the app.

Enter the token into the **Verification code field**

There is a time limit for you to enter the code. If you see the following message, you will need to start over

**Step 3: Verify two-step verification token**

Enter the verification code that appears in the application into the field below then click the Verify Code button:

Verification Code:

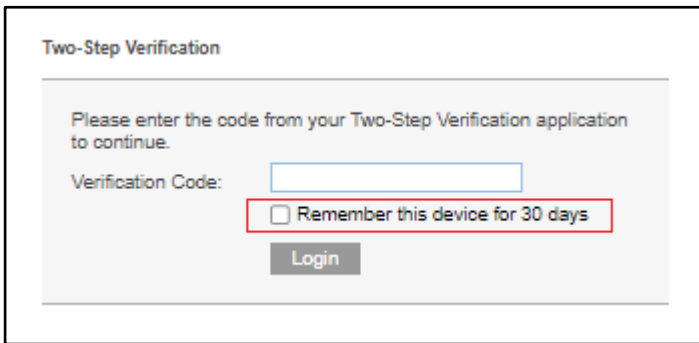
**Unfortunately it took too long to verify the code. Please set-up two-step verification again and try another verification code.**

If this message appears, delete the account from your app and start again from Step 3.

If the code is accepted, you will see the following across the top of the screen:

**Two-Step Verification has been enabled**

The next time you log into CDS, you will need to enter a Token/Verification Code from your authentication app.



Two-Step Verification

Please enter the code from your Two-Step Verification application to continue.

Verification Code:

Remember this device for 30 days

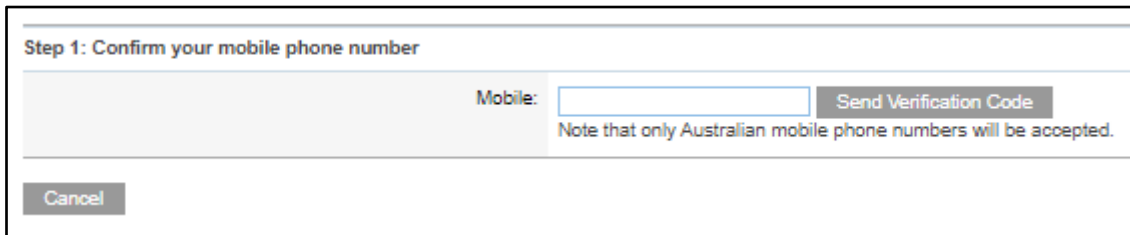
Login

**Note:** please **DO NOT** tick the Remember this device for 30 days box.



### Option # Via SMS message

Enter your mobile number and click Send Verification Code



Step 1: Confirm your mobile phone number

Mobile:  Send Verification Code

Note that only Australian mobile phone numbers will be accepted.

Cancel

Enter the verification code and click Verify Code



Step 2: Verify Two-Step Verification

Enter the verification code that has been sent via SMS to xxxx xxx into the field below then click the Verify Code button.

Verification Code:  Verify Code

Cancel

You will see the following across the top of the screen:

Two-Step Verification has been enabled

The next time you log into CDS, you will need to enter the Verification Code that was sent to your mobile

Two-Step Verification

Verification code has been sent to xxxx xxx 472

Please enter the verification code sent to your mobile device to continue.

Verification Code:

Remember this device for 30 days

Login

**Note:** please **DO NOT** tick the Remember this device for 30 days box.



If you have any questions or need assistance, please contact your Regional Support Officer:

Corinne Brown – 0408 454 133

Sharon McCoy – 0448 755 332

Kati Reeves – 0490 895 065

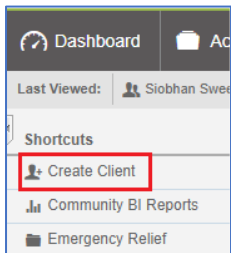
## Create a New Companion File

<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to create a new client (companion) in CDS
<b>Procedure</b>	<b>Create a New Companion File</b>



Always search for the client in the system before creating a new record to avoid duplicates. Clients might be in the system with different name spellings, so it is worth searching with additional criteria e.g. DOB as a double check. If they are in the system you can update the client record instead of creating a new one. Refer to the [Update companion information](#) info sheet for instructions

### Step 1.



Select **Create Client** from the Shortcuts list on the top left-hand corner of the screen

A blank client record will open. All fields marked with \* are mandatory and must be completed before you can save the record.

### Step 2.

- **Privacy Consent Form Collected** – select Yes or No from the drop-down list.
- **First and Last Name** – enter the companions first and last name. If they do not wish to give us their name a pseudonym can be used e.g., person escaping domestic violence.
- **Alias** – a name the companion is known by, not their legal name.
- **Pseudonym used** – Please indicate is a pseudonym is being used.

### Step 3.

- **Birthdate** – select the date using the calendar or type using the dd/mm/yyyy format. If the companion does not want to give their DOB, record it as 01/01/ of the year you estimate they were born.
- **Date of Birth Estimated** – select No if the Companion provided and Yes if they did not
- **Gender** – select from the drop-down list. It is a DSS requirement to record this information. If the companion does not wish to answer, select Not Stated/Inadequately described
- **Mobile** – enter the mobile number. If no mobile enter N/A
- **Other phone** – secondary contact number can be added

#### Step 4.

- **Homeless** – select Yes or No from drop-down list. People are considered homeless if they fall into one of the 3 categories below.

Primary homelessness	People without conventional accommodation e.g. sleeping rough or improvised dwellings
Secondary homelessness	People who frequently move from one temporary shelter to another e.g. emergency accommodation, couch surfing or refuges
Tertiary homelessness	People staying in accommodation that falls below minimum community standards e.g. boarding house or caravan park

- **Visit Risk – refer Notes** – ticking this box creates an alert at the top of the companion record to direct users to the Notes section where information about possible risks when conducting home visits is recorded e.g., aggressive behaviour, dog on premises or “knock loudly, companion hard of hearing”.

**WARNING: Visit Risk - refer Notes**

- **More Data Required** – ticking this box creates an alert at the top of the companion record to inform users that information is missing, needs to be checked or updated.

**WARNING: More data required**

#### Step 5.

Enter the unit/street number and name into the **Residential Address** field

#### Step 6.

Click **Select** next to the **Residential Locality** field

#### Step 7.

Type the town or suburb in the **Suburb** field. Select the correct **Town/Suburb** and **postcode**

**Search Locality**

Suburb:  Default Site / Conference: ANU  
 ADELONG  
 ARANDA  
 BATEMANS BAY  
 BATLOW  
 BEGA

SVDPCG Region:  Clear form  
 Post Code:  DSS Region:   
 Notes:

**Step 8.**

Once the suburb and Post Code field are populated click **Search**.

**Search Locality**

Suburb:

SVDPCG Region:

Post Code:

Assigned to: admin, default, jemma.rossetto, johnvance, Jtharmatheva, kathryn.james

**Step 9.**

Select the correct Suburb/Town from the Locality List. This will ensure the correct **Conference and Region** are applied to this companion.

**Locality List**

Name	Default Site / Conference	SVDPCG Region	DSS Region
<u>CRESTWOOD, NSW (2620)</u>	QUEANBEYAN	MOLONGLO	CAPITAL REGION

The Suburb/Town, State, Postcode and Site fields will be automatically completed.

**Address Information**

Residential Address: \*

Residential Locality: \*

Site:  ▼

If your search did not locate the correct Town or Suburb, please contact Conference Support on 02 6282 2722 or [Conferences.CG@vinnies.org.au](mailto:Conferences.CG@vinnies.org.au) for assistance.

**Step 10.**

The **Other Information** section is where we collect statistical data on the people we assist. It is important to enter the correct data as this is sent to the DEX data exchange to meet out funding reporting requirements. In addition to the mandatory fields, you will need to update the Residency Status filed if the response to the County of Birth is not Australia.

Other Information			
Country of Birth: *	<input type="text"/>	Main Language Spoken at Home: *	<input type="text"/>
CALD:	<input type="checkbox"/>		
Aboriginal / Torres Strait Islander?: *	<input type="text"/>	Residency Status:	Australian Citizen <input type="text"/>
Longterm Disability: *	<input type="text"/>		
Household Composition: *	<input type="text"/>	Main source of income: *	<input type="text"/>
Housing Tenure: *	<input type="text"/>		
Do you have an ACT Services Access card? ⓘ	<input type="text"/>		
Consent to participate in client research: *	<input type="text"/>		

**Step 11.**

Notes

Notes:

Save

Cancel

The **Notes** section can be used to record important Companion information such as safety concerns, suspension information or if only certain Conference members should be working with the Companion.

**Note:** this information is printed on the daily call lists, so it is important that only current relevant information is entered here.

All other information can be recorded in the Client Event section – see the [Create a Client event](#) info sheet.

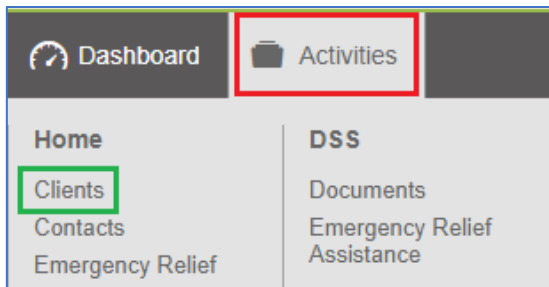
Once all data is entered click **Save**.

## Search for a Companion

<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to search for a Companion
<b>Procedure</b>	<b>Search for a Companion</b>

### Step 1.

After logging into CDS click on the **Activities** tab on the menu bar, then click **Clients**.



### Step 2.

You have the option to use the **Basic** or **Advanced** Search tabs. You can search using several different criteria. In the example below we are searching using **First Name** and the first initial of the **Last Name**. Once you have entered the criteria click **Search**.

**Note:** If your expected data is not returned, check your criteria or click Clear to remove any Active Search criteria and start over.

**Clients: Home**

Basic Search | Advanced Search

<b>First Name</b>	<input type="text" value="John"/>	<b>Last Name</b>	<input type="text" value="Smith"/>
Client ID	<input type="text"/>	Birthdate	<input type="text" value=""/>
Assigned to	<input type="text"/> <input type="button" value="Select"/> <input type="button" value="Clear"/>	Any Address	<input type="text"/>
Any Email	<input type="text"/>	Suburb	<input type="text"/>
Postal Code	<input type="text"/>	Created Before	<input type="text" value=""/>
Created After	<input type="text" value=""/>	Partner First Name	<input type="text"/>
Partner Last Name	<input type="text"/>	Centrelink reference	<input type="text"/>
Only my items	<input type="checkbox"/>	Date of Birth - After	<input type="text" value=""/>
Date of Birth - Before	<input type="text" value=""/>	ER Case Date - After	<input type="text" value=""/>
ER Case Date - Before	<input type="text" value=""/>	CDS Client ID	<input type="text"/>

| Saved Searches

### Step 3.

Any matching records will be displayed in the **Client List**.

The screenshot shows the 'Active Search' box with the criteria: 'First Name: John Last Name: smi'. Below it is the 'Client List' table with columns for selection, name, and details. The table contains three entries: 'JOHN SMITH', 'JOHN SMITH', and 'JOSHUA JOHN SMITH'. The second 'JOHN SMITH' entry is highlighted with a green border.

Select	Name
<input type="checkbox"/>	JOHN SMITH
<input type="checkbox"/>	JOHN SMITH
<input type="checkbox"/>	JOSHUA JOHN SMITH

The **Active Search** box shows the criteria used for the search.

If more than one result is displayed, locate the companion from the list and click on them to open their record.

### Step 4.

The **Advanced Search** tab has several extra fields that you can use to search.

**Note:** Adding more criteria will narrow your search but spelling errors can happen. If you believe a client record exists, you may want to broaden your search.

The screenshot shows the 'Clients: Home' page with the 'Advanced Search' tab selected. It features a grid of search criteria fields including: First Name (John), Last Name (Smith), Client ID, Birthdate, Assigned to, Any Address, Any Phone, Any Email, Suburb, Postal Code, Centrelink reference, Gender (dropdown menu), Aboriginal / Torres Strait Islander? (dropdown menu), Minimum Age, Maximum Age, Partner First Name, Partner Last Name, Only my items, Date of Birth - After, Date of Birth - Before, ER Case Date - After, ER Case Date - Before, Do you have an ACT Services Access card? (dropdown menu), Housing Tenure (dropdown menu), and CDS Client ID. At the bottom, there are buttons for 'Search', 'Clear', 'Saved Searches', 'Layout Options', 'Save search as:', 'Save', 'Modify current search:', 'Update', and 'Delete'.

## Update Companion Information

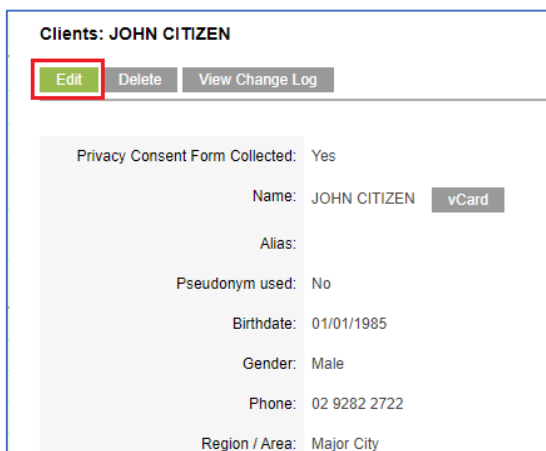
<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to update companion information in CDS
<b>Procedure</b>	Update Companion Information

### **Step 1.**

Locate the Companion in CDS – see [Search for a Companion](#) info sheet for instructions.

### **Step 2.**

Open the Companion record and click **Edit**



Client: JOHN CITIZEN

**Edit** Delete View Change Log

Privacy Consent Form Collected: Yes

Name: JOHN CITIZEN vCard

Alias:

Pseudonym used: No

Birthdate: 01/01/1985

Gender: Male

Phone: 02 9282 2722

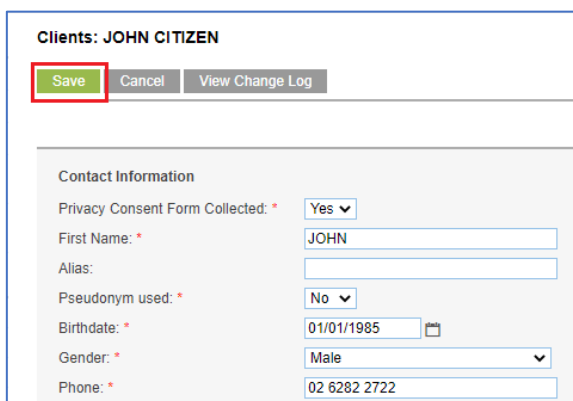
Region / Area: Major City

### **Step 3.**

Make the required changes to the information. This could include a change of address, a new phone number or an update to the Notes section to ensure only relevant/current information is recorded.

### **Step 4.**

Once all the changes have been made ensure you click **Save**



Client: JOHN CITIZEN

**Save** Cancel View Change Log

Contact Information

Privacy Consent Form Collected: \* Yes

First Name: \* JOHN

Alias:

Pseudonym used: \* No

Birthdate: \* 01/01/1985

Gender: \* Male

Phone: \* 02 6282 2722

## Create an Emergency Relief Entry

<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to create an Emergency Relief entry on a companion record
<b>Procedure</b>	<b>Create an Emergency Relief Entry</b>

### Step 1.

Search for the companion in CDS – see the [Search for a Companion](#) info sheet for instructions

If they do not exist, follow the [Create a New Companion Record](#) info sheet

### Step 2.

Open the companion record and scroll down to the **Emergency Relief** section and click **Create**

### Step 3.

The Emergency Relief screen will open and be prefilled with some data based on the information entered when the companion was set up. If the companion's **main source of income** is a Government payment or pension, you will need to select the **Centrelink Payment Type** from the drop-down list,

## Step 4.

### Complete the Session Details

Session Details

Contact Type: Phone

Assistance Sought: \*

- 2nd call / message
- Accommodation/Rent
- Assistance with credit card debts
- Assistance with school costs
- Bedding and blankets
- Bushfire Relief
- Christmas hampers
- Clothing needs
- Domestic violence issues
- Experiencing non-payment period from Centrelink
- Family crisis
- Food
- Furniture and Household Items
- Health and Medical
- Money for paying a large bill
- Other
- Travel cost issues
- Utility bill
- Whitegoods
- Household maintenance
- Social Visit

Adult(s) for Visit: \*

Child(ren) for Visit: \*

**Contact Type** – The default is Phone but could be face to face depending on how your conference operates

**Assistance Sought** – more than one option can be selected by holding down the control [Ctrl] key on the keyboard and clicking on each option

**Adults and Children for visit** - This is important as the number of people seeking assistance may vary from visit to visit. For example: Single Dad with children for the weekend, Friend/family visiting. This data also provides a more accurate view of the support being provided e.g. one instance of Emergency relief is assisting a family of 5.

Main Presenting Problem: \*

Material wellbeing

Secondary Presenting Problem(s): \*

- Physical health
- Mental health
- Personal and family safety
- Age-appropriate development
- Community participation & networks
- Family functioning
- Money management
- Employment
- Education and skills training
- Material wellbeing
- Housing

Service Delivery Issues:

- Out of Hours
- Interpreter Present/Required
- Other

Session Notes:

**Main presenting Problem** – this defaults to Material wellbeing and should not be changed

**Secondary Presenting Problem/s** – this is an optional data field

**Session Note** - are generally used by Helpline to inform Conferences of information directly related to the request.

Click **Save**

Save Cancel

## Record Assistance Provided

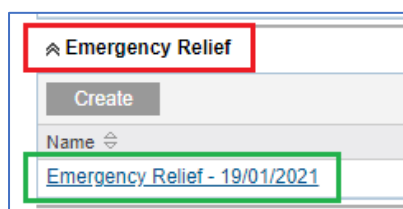
<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to record the assistance provided to companions
<b>Procedure</b>	<b>Record Assistance Provided</b>

### Step 1.

Search for the companion in CDS - see the [Search for a Companion](#) info sheet for instructions.

### Step 2.

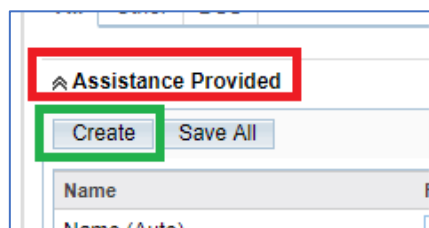
Open the companion record and scroll down to the **Emergency Relief** section



Select the relevant **Emergency Relief** entry and click to open it.

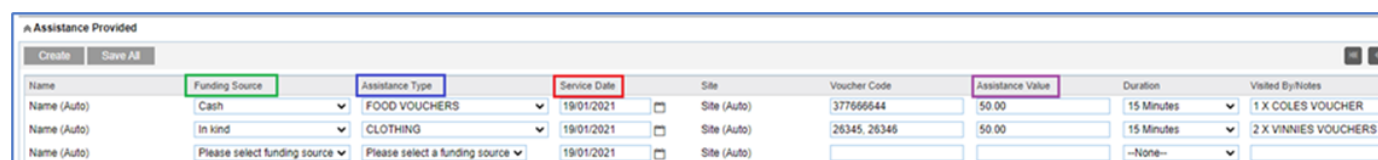
### Step 3.

Scroll down to the **Assistance Provided** section and click **Create**



### Step 4.

Enter the mandatory information. There are 4 lines available to enter the assistance provided. In the example below, food and clothing vouchers were provided. These must be entered as 2 separate entries. If there are more than 4 types of assistance provided in the one visit you can click **Create** to add additional assistance.



Name	Funding Source	Assistance Type	Service Date	Site	Voucher Code	Assistance Value	Duration	Visited By/Notes
Name (Auto)	Cash	FOOD VOUCHERS	19/01/2021	Site (Auto)	37766644	50.00	15 Minutes	1 X COLES VOUCHER
Name (Auto)	In kind	CLOTHING	19/01/2021	Site (Auto)	26345, 26346	50.00	15 Minutes	2 X VINNIES VOUCHERS
Name (Auto)	Please select funding source	Please select a funding source	19/01/2021	Site (Auto)			--None--	

- **Funding Source** – select **Cash** (items purchased by the conference) or **In Kind** (items with no cost to the Society)
- **Assistance Type** – select from the drop-down list.
- **Service Date** – enter date the assistance was provided (may be different from the default date)
- **Assistance Value** – enter amount. You do not need to enter \$, decimal point or cents.

## Step 5.

Enter the optional data as applicable.

Name	Funding Source	Assistance Type	Service Date	Site	Voucher Code	Assistance Value	Duration	Visited By/Notes
Name (Auto)	Cash	FOOD VOUCHERS	19/01/2021	Site (Auto)	37766644	50.00	15 Minutes	1 X COLES VOUCHER
Name (Auto)	In kind	CLOTHING	19/01/2021	Site (Auto)	26345, 26346	50.00	15 Minutes	2 X VINNIES VOUCHERS

- **Voucher Code:** enter any applicable code i.e. Vinnies voucher or Coles card number
- **Duration:** time taken to provide the assistance
- **Visited By/Notes:** enter the names/initials of the members who provided the assistance and any relevant notes.

Once all the information has been entered click **Save All**

If you wish to record additional information about the assistance provided you can click on the **Assistance**

Name	Funding Source	Assistance Type	Service Date	Site
Name (Auto)	Please select funding source	Please select a funding source	19/01/2021	Site (Auto)
Name (Auto)	Please select funding source	Please select a funding source	19/01/2021	Site (Auto)
Name (Auto)	Please select funding source	Please select a funding source	19/01/2021	Site (Auto)
Name (Auto)	Please select funding source	Please select a funding source	19/01/2021	Site (Auto)
Assistance_CLOTHING - 19/01/2021	In kind	CLOTHING	19/01/2021	QUEANBEYAN
Assistance_FOOD VOUCHERS - 19/01/2021	Cash	FOOD VOUCHERS	19/01/2021	QUEANBEYAN

Select **Edit**.

Emergency Relief Assistance: Assistance: CLOTHING - 19/01/2021	
<b>Edit</b> Duplicate Delete View Change Log	
Session ID:	erlp60821747210495
Emergency Relief:	<a href="#">Emergency Relief - 19/01/2021</a>

You can enter more information in the **Notes** section then click **Save**.

Save Cancel View Change Log	
Service Date: *	19/01/2021 (dd/mm/yyyy)
Service Setting:	
Interpreter Present:	<input type="checkbox"/>
Funding Source: *	In kind
Voucher Code:	23645, 23646
Assistance Value: *	50.00
Visited By/Notes:	2 X VINNIES VOUCHERS
<b>Notes:</b>	PROVIDED VINNIES VOUCHERS FOR JOHN TO PURCHASE W HE REQUIRES ASSISTANCE WITH BEDDING IN THE FUTURE

## **How to record different types of Assistance Provided**

### **Financial Calls**

It is important to record each item of assistance provided separately to ensure complete and accurate records are maintained. E.g., Companion receives a \$50 food voucher \$25 Vinnies voucher, two separate Assistance Provided records must be created: one for the food voucher (Cash), and another for the Vinnies voucher (In Kind).

### **Social Visits and follow up calls**

Social visits and follow up calls are where No Financial Assistance (Cash or In Kind) was given. E.g., a visit to follow up on a call to find out if the furniture arrived.

**Assistance Type:** No Financial Assistance

**Value:** 0

**Funding Source:** In Kind

### **Not home calls**

When a Conference finds that the person is unable to be contacted the call information must still be completed. E.g. they have not answered their phone and/or were not in for the visit(s).

**Assistance Type:** Unable to Contact

**Value:** 0

**Funding Source:** In Kind

Once a call has been closed, if the person rings in again within the normal Conference call cycle then a 2nd call is recorded in the system. Refer to **Messages and second calls** for further information.

### **Advocacy visits**

When a Conference provides some form of Advocacy the call information must still be completed. E.g., going with the companion to Centrelink.

**Assistance Type:** Advocacy

**Value:** 0

**Funding Source:** In Kind

### **Referrals**

When a Conference decides that a Referral is needed E.g. getting the Salvation Army to assist.

**Assistance Type:** Referral

**Value:** 0

**Funding Source:** In Kind

### **Messages and second calls**

A Message Call is where the person calling just wishes to pass on message. For example: 'Thanks for the hamper' or 'I have got the quote the volunteer wanted'.

A Second Call is created when the person contacts the Helpline because they have received no contact from the volunteers, or they missed the volunteers – card or missed call

The Helpline duplicates the first call and adds the reason for seeking assistance to 2nd call/message.

A 2nd call/message record appears like other calls and needs to be closed.

These calls are recorded similarly to a Financial Call except you will need to select the correct Assistance Type, record any relevant costs in the Assistance Value field and select appropriate funding source

Session Details	
Contact Type:	Phone
Assistance Sought:	<ul style="list-style-type: none"><li>• 2nd call / message</li><li>• Clothing needs</li><li>• Health and Medical</li></ul>
Adult(s) for Visit:	1
Main Presenting Problem:	Material wellbeing
Secondary Presenting Problem(s):	
Service Delivery Issues:	
Session Notes:	Seeking assistance with pharmacy bill and summer clothing Companion called as they have not heard from the volunteers
Total Assistance:	0.00

## Create a Companion Event

<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to create a client event to record important companion information.
<b>Procedure</b>	<b>Create a companion event</b>

A Client Event is used by Conferences to record information on their interactions with companions. This allows members and volunteers to better support the companion and provide supporting evidence, should it be required, for any decisions made regarding limiting or suspending assistance

**Important** All notes must be factual, not opinion and written in a professional manner. Information recorded in CDS can be requested for legal purposes and companions are entitled to access the information written about them.

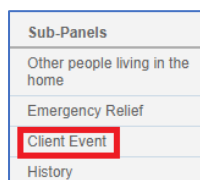
When recording information supplied by a companion e.g., the status of their health, make sure that words such as “They disclosed...” or “Jane told us that...” are included. This way it is clear the information recorded has not been confirmed by the Society and that we have not made a judgement call on the companion.

A separate event should be created for each interaction with a relevant subject description and appropriate category selected, so it is easy to locate specific information if required.

### Step 1.

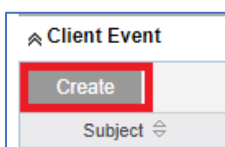
Locate the companion in CDS and open their record – see [Search for a Companion](#) info sheet for instructions.

### Step 2.



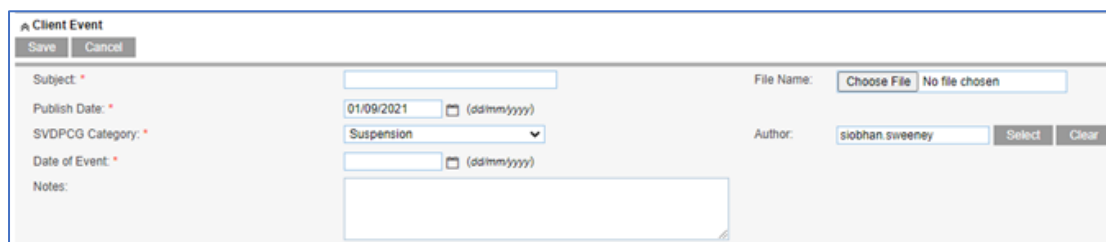
Select **Client Event** from the Sub-Panel on the left-hand side of the screen.

### Step 3.



Click **Create**

### Step 4.

A screenshot of the 'Client Event' creation form. It includes a 'Save' button and a 'Cancel' button. The form fields are: 'Subject' (text input), 'Publish Date' (calendar icon, value: 01/09/2021), 'SVDPCG Category' (dropdown menu, value: Suspension), 'Date of Event' (calendar icon, value: (dd/mm/yyyy)), 'File Name' (text input, value: Choose File, No file chosen), 'Author' (text input, value: siobhan.sweeney, with 'Select' and 'Clear' buttons).

The client event screen will open

### Step 5.

Enter a relevant **Subject** description.

The **Publish Date** will default to the current date – no change required

Select a **SVDPCG Category** from the drop-down list

Enter the **Date of the Event**

Enter any relevant **Notes**

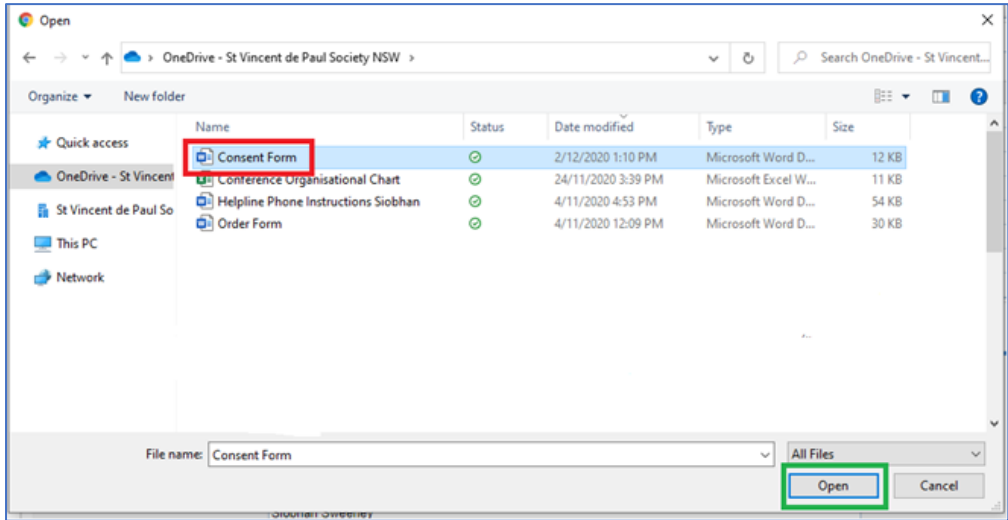
**Step 6.**

To attach a document, **Choose File**

A new window will open allowing you to navigate to the document you want to attach.

Click on the document to highlight it. In this example **Consent form**

Click **Open**



Document will be saved

**Step 6.**

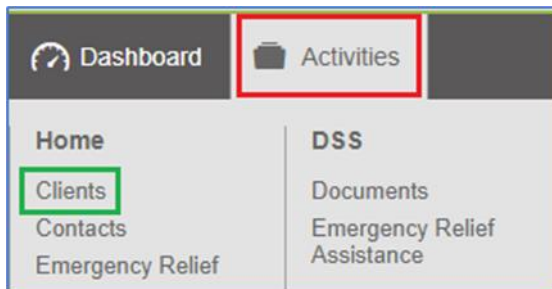
Once the file has been attached you can add a **Note** if required then click **Save**

## Generate a Client Event Report

<b>Updated</b>	20/10/2021
<b>Purpose</b>	To instruct the user how to generate a client event report for a companion
<b>Procedure</b>	<b>Generate a Client Event Report</b>

### Step 1.

After logging into CDS click on the **Activities** tab on the menu bar, then click **Clients**.



### Step 2.

You have the option to use the **Basic** or **Advanced** Search tabs. You can search using several different criteria. In the example below we are searching using **First Name** and the first initial of the **Last Name**. Once you have entered the criteria click **Search**.

**Note:** If your expected data is not returned, check your criteria or click Clear to remove any Active Search criteria and start over.

**Clients: Home**

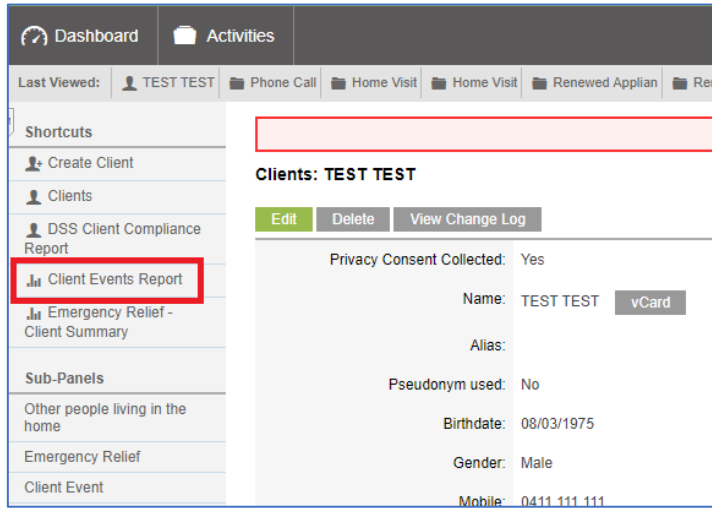
Basic Search | Advanced Search

<p><b>First Name</b> <input style="width: 80%;" type="text" value="John"/></p> <p>Client ID <input style="width: 80%;" type="text"/></p> <p>Assigned to <input style="width: 80%;" type="text"/> <span>Select</span> <span>Clear</span></p> <p>Any Email <input style="width: 80%;" type="text"/></p> <p>Postal Code <input style="width: 80%;" type="text"/></p> <p>Created After <input style="width: 80%;" type="text"/> <input type="calendar"/></p> <p>Partner Last Name <input style="width: 80%;" type="text"/></p> <p>Only my items <input type="checkbox"/></p> <p>Date of Birth - Before <input style="width: 80%;" type="text"/> <input type="calendar"/></p> <p>ER Case Date - Before <input style="width: 80%;" type="text"/> <input type="calendar"/></p>	<p><b>Last Name</b> <input style="width: 80%;" type="text" value="Smith"/></p> <p>Birthdate <input style="width: 80%;" type="text"/> <input type="calendar"/></p> <p>Any Address <input style="width: 80%;" type="text"/></p> <p>Suburb <input style="width: 80%;" type="text"/></p> <p>Created Before <input style="width: 80%;" type="text"/> <input type="calendar"/></p> <p>Partner First Name <input style="width: 80%;" type="text"/></p> <p>Centrelink reference <input style="width: 80%;" type="text"/></p> <p>Date of Birth - After <input style="width: 80%;" type="text"/> <input type="calendar"/></p> <p>ER Case Date - After <input style="width: 80%;" type="text"/> <input type="calendar"/></p> <p>CDS Client ID <input style="width: 80%;" type="text"/></p>
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Search Clear | Saved Searches --None--

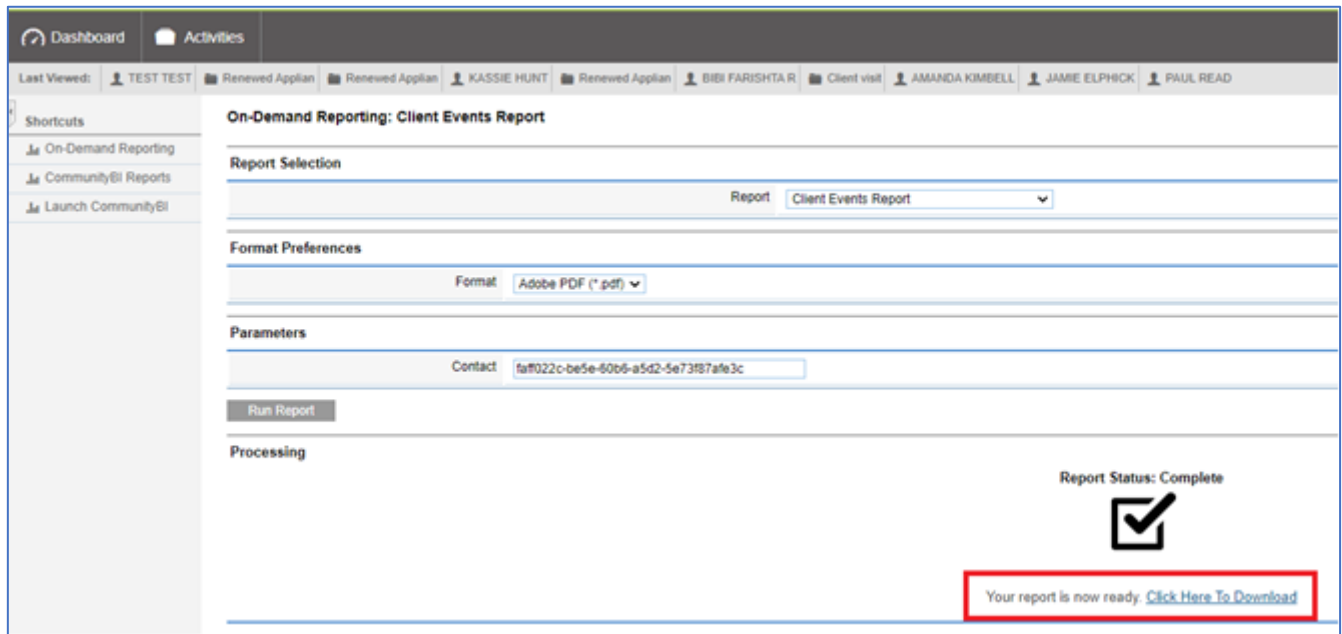
### Step 3.

Once you have located the companion click on **Client Event Report** on the left-hand side of the screen.



### Step 4.

The On-Demand Reporting screen will open. You don't need to enter any information; the report automatically generates. Once the report has generated you will need to **download** it. This will open a PDF that you can save or print as required.



## Add a Referral to a Companion File

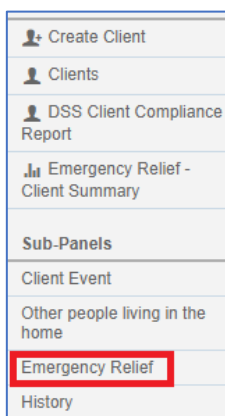
<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to add a referral to another service to a companion file
<b>Procedure</b>	<b>Add a Referral to a Companion File</b>

### **Step 1.**

Search for the companion in CDS – see the [Search for a Companion](#) info sheet for instructions.

### **Step 2.**

Open the companion record and select **Emergency Relief** from the Sub-Panel on the left-hand side of the screen.



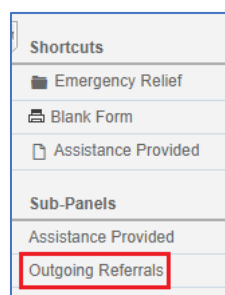
### **Step 3.**

Select the relevant **Emergency Relief** entry and click to open it.



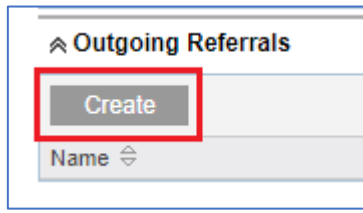
### **Step 4.**

Select **Outgoing Referrals** from the Sub-Panel on the left-hand side of the screen.



### Step 5.

Click on **Create**.

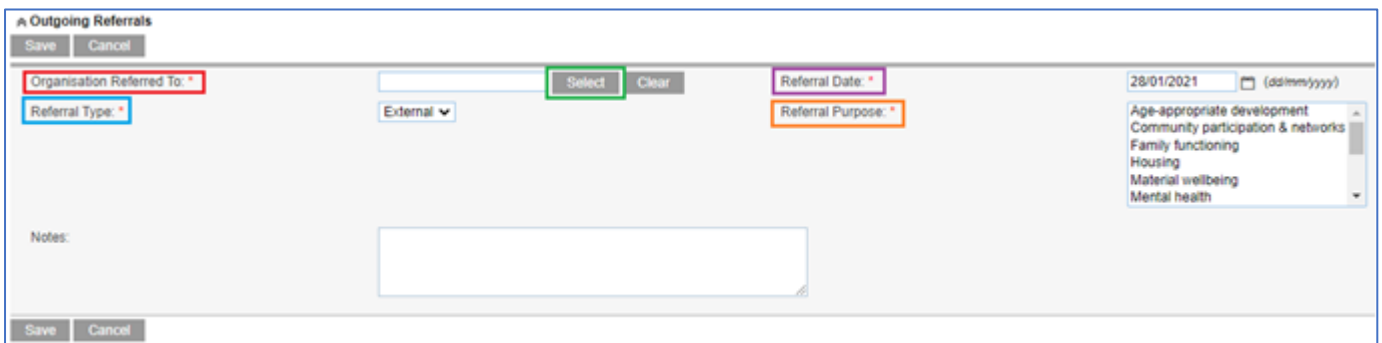


A screenshot of a web form titled "Outgoing Referrals". At the top left, there is a small upward-pointing arrow icon. Below the title, there is a grey button labeled "Create" which is highlighted with a red rectangular box. Underneath the button is a text input field labeled "Name" with a small downward-pointing arrow icon to its right.

### Step 6.

Enter the mandatory information.

- **Organisation Referred To** (or program name if internal) click **Select** to search for the organisation.
- **Referral type** - internal or external.
- **Referral date** – date referral was made.
- **Referral purpose** – refer to list below.



A screenshot of the "Outgoing Referrals" form. At the top left, there are "Save" and "Cancel" buttons. The form contains several fields: "Organisation Referred To:" (highlighted in red), "Referral Type:" (highlighted in blue), "Referral Date:" (highlighted in purple), and "Referral Purpose:" (highlighted in orange). The "Referral Date" field shows "28/01/2021" and a calendar icon. The "Referral Purpose" field has a dropdown menu open, showing a list of options: "Age-appropriate development", "Community participation & networks", "Family functioning", "Housing", "Material wellbeing", and "Mental health". There is also a "Select" button (highlighted in green) and a "Clear" button next to the "Organisation Referred To" field. At the bottom, there is a "Notes:" section with a text area and another "Save" and "Cancel" button.

Add any relevant Notes if you wish and click **Save**

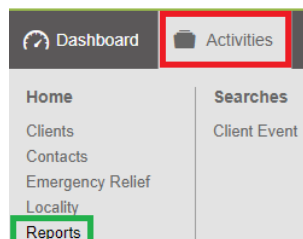
### Examples of Referrals

Age-appropriate development	St Joe's Youth Program, VINES Youth Program, St Nick's Young Carers
Community participation and networks	Volunteering opportunities through Access Canberra, social inclusion programs, sport programs
Education/Employment	Clemente
Family Functioning	Parenting Programs
Housing	One Link
Material Wellbeing	Usually, material goods e.g. food relief at other agencies, Thread Together
Mental Health	ACT Health, Compeer
Money Management	Care Financial

## Generate a Call List

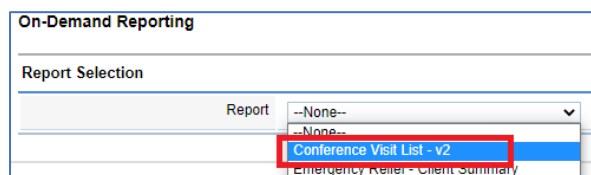
<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to generate a list of emergency relief assistance calls
<b>Procedure</b>	<b>Generate a Call List</b>

### Step 1.



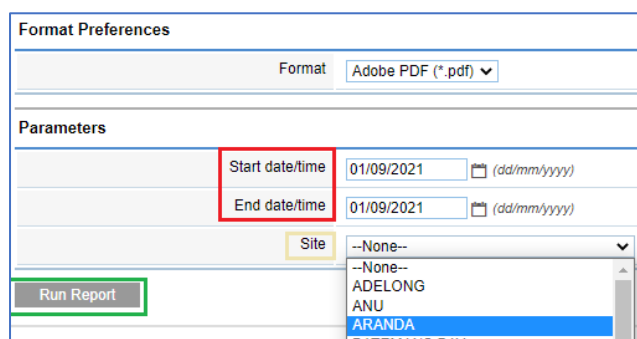
To generate the call list report in CDS click on the **Activities** tab then select **Reports**

### Step 2.



Select **Conference Visit List** – v2 from the drop-down list

### Step 3

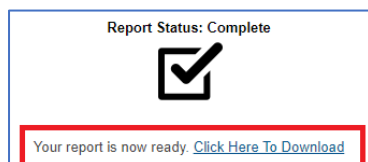


Enter the date in the **Start and End date** fields

Select the relevant conference from the drop-down list in the **Site** field

Click **Run Report**

### Step 4.



Once the report has generated you will need to **download** it

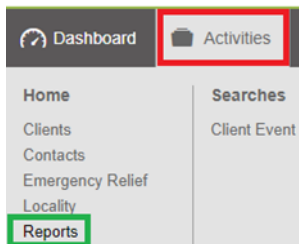
### Step 5.

Open the report - you will be required to enter the monthly password. If there are no calls listed the report will be blank. The password is sent to each Conference in the last week of the month. If you require any assistance please contact the Conference Support Team on 02 6282 2722 or [conferences.cg@vinnie.org.au](mailto:conferences.cg@vinnie.org.au)

## Generate a Conference Statistical Report

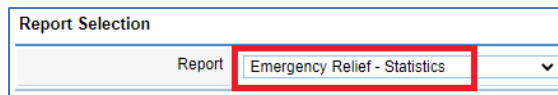
<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to generate a statistical report of their conference
<b>Procedure</b>	<b>Generate a Conference Statistical Report</b>

### Step 1.



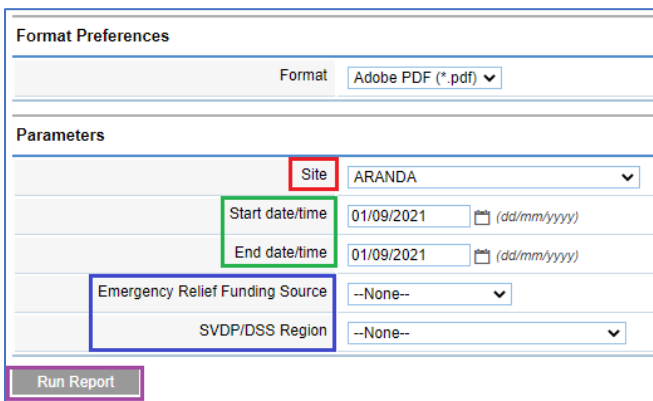
To generate the call list report in CDS click on the **Activities** tab then select **Reports**

### Step 2.



Select **Emergency Relief – Statistics** from the drop-down list

### Step 3.



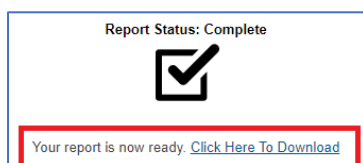
Select the relevant conference from the drop-down list in the **Site** field

Enter the date in the **Start and End date** fields

Leave the **Emergency Relief Funding Source** and **SVDP/DSS Region** fields displaying -None-

Click **Run Report**

### Step 4.

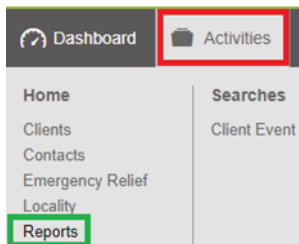


Once the report has generated you will need to **download** it

## Generate a Regional Statistical Report

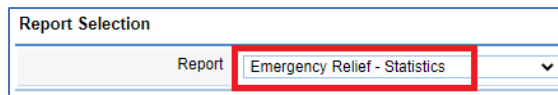
<b>Updated</b>	1/09/2021
<b>Purpose</b>	To instruct the user how to generate a statistical report for a particular region/s
<b>Procedure</b>	<b>Generate a Regional Statistical Report</b>

### Step 1.



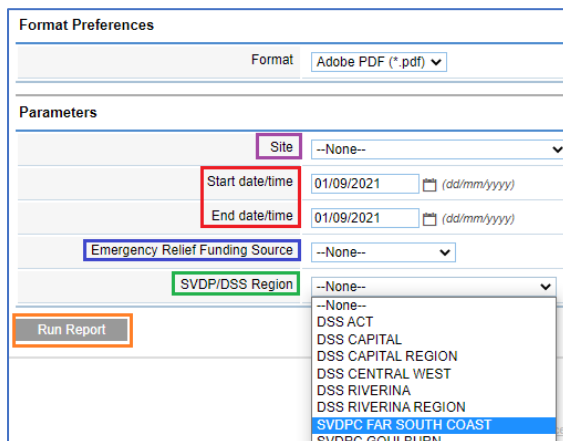
To generate the call list report in CDS click on the **Activities** tab then select **Reports**

### Step 2.



Select **Emergency Relief – Statistics** from the drop-down list

### Step 3.



Leave the **Site** field blank

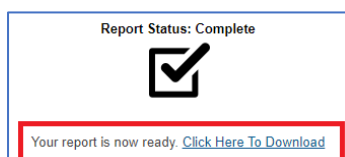
Enter the date in the **Start and End date** fields

Leave the **Emergency Relief Funding Source** field displaying - None-

Select your region from the **SVDP/DSS Region** field

Click **Run Report**

### Step 4.



Once the report has generated you will need to **download** it