MEMBERS AND VOLUNTEERS USER GUIDE

CONFERENCE ASSISTANCE MANAGEMENT SYSTEM (CAMS)

Welcome to the Conference Assistance Management System (CAMS)

This is a system designed to improve the way the Society assists the people who come to us for support and ensure that we capture their information in a safe and secure way.
You may be wondering why we wanted to introduce a new system. Basically, the ten Central Councils across NSW were operating with different systems, which did not meet the stringent privacy needs the Society must now adhere to. The three systems also did not provide us with robust data about the impact members were having. This means we provide targeted support where needed, and we are able to provide the NSW Government with data that they require, which results in more funding and more resources directed to Conferences who can continue providing support to their communities.

The system will be used by members and volunteers to do data entry for their Conference or Support Centre. It is important that every Conference has at least one person using the system to ensure that the data is entered in a timely way.

This document is a guide to providing assistance while using CAMS. It includes instructions on how to use the system, as well as best practise processes to ensure our clients receive a high standard of service.

What You should Know about CAMS and Privacy

The data we collect on the People We Assist is very personal in nature, and the Society has a responsibility to ensure it doesn't fall into the wrong hands.

CAMS has been designed to incorporate best practice security measures which align with the Australian Privacy Act 1988. This is a piece of Federal legislation that governs how organisations handle data.

Some of these new features include the requirement for all members to have Vinnies email addresses and the initial double-factor authentication (when you receive a code to your phone). Only people with login details for CAMS will be able to access the system. This means members and volunteers across NSW, as well as central council and IT administration staff.

Members and volunteers who use the system also have a responsibility to follow instructions throughout this document to ensure they are following best practice processes to ensure privacy is maintained.

You would also be aware of our privacy statement which states that the Society members seek consent from clients for *'the St Vincent de Paul Society NSW (the Society) to record, use, disclose and store my personal information and sensitive information, where it is appropriate and/ or necessary for the Society to carry out its functions and activities'.*

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1. Getting ready to use CAMS

1.1 Setting up Usernames and passwords

Before you start to use CAMS, you'll need to have a username and password. Because we have high security requirements for those who use the system, only people with a Vinnies email address are allowed to use the CAMS system. This Vinnies email address will look like this: firstname.lastname@vinnies.org.au. This will be your username.
Members and volunteers can request a Member and Community Engagement Coordinator, Operations Support Officer or Support centre Coordinator to set up CAMS access for them. You need to provide the following details to them:

- Central Council
- First name, Middle name, Last name
- Whether you are a member or volunteer
- Conference or support centre
- Mobile
- Personal email or existing Vinnies email

Once you receive your username and password, you will be ready to start using the system. Usernames and passwords should be organised before any training sessions.

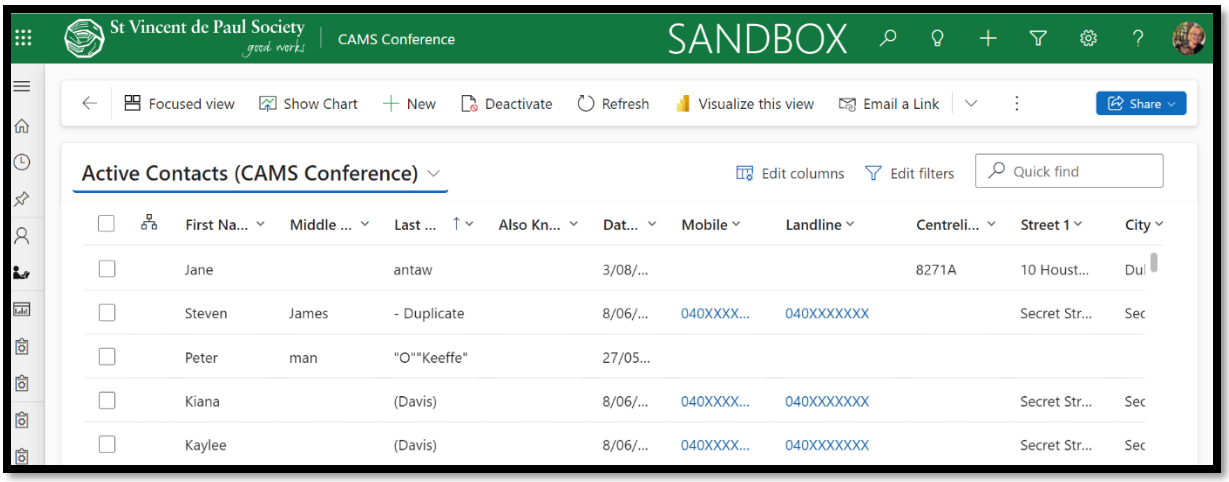
1.2 Downloading Chrome

There are different browsers you can use on your computer that will allow you to access the Internet. But the best one to have on your computer for using CAMS is Chrome. It's the one that looks like this:

If you have it, you'll see it on the bottom of your computer screen. If you don't already have it, you can download it by doing a Google search using the words, 'download chrome', and your search will produce a range of websites that let you download it for free. You will need to download it and install it. You can get help for this if necessary.

1.3 Opening the training and live system

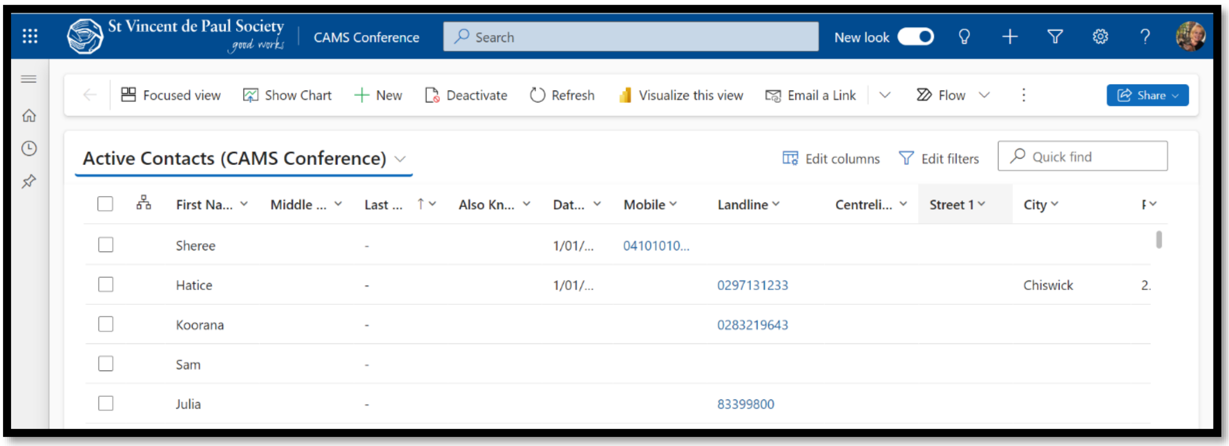
There are two CAMS environments; the training environment, which is the one we will use during the training session. It's called the Sandbox, and it looks like this:



When we are using the training environment, we are not looking up real people or creating real records. It is simply there to help us learn how to use the system.

You can access the training system by clicking on this link here:
https://svdp-trn-crm-02.crm6.dynamics.com/main.aspx?appid=2ff23c3e-0f47-4500-8119-10f62bbf8647&pagetype=entitylist&etn=svdp_camsinteraction&viewid=c691acc3-6e9e-eb11-b1ac-000d3a6a64be&viewType=1039.

There is also the live system, which is the one you'll be using when you are doing your actual work. This is the system where you will enter details of the people you assist, and this will create records. The live or 'real' system looks like this:



You can access the live system by clicking on this link here:
https://svdp-prd-crm-02.crm6.dynamics.com/main.aspx?appid=2ff23c3e-0f47-4500-8119-10f62bbf8647&pagetype=entitylist&etn=contact&viewid=f79ef9fd-5172-eb11-a812-000d3acbab44&viewType=1039

1.4 Bookmarking the website on your laptop or computer

After you click on these links and open up the website for the first time, you can save it to your computer by creating a bookmark. To bookmark a website, click on the star icon:

You will then be able to find it easily at the top of your screen:

2. Setting up your CAMS access

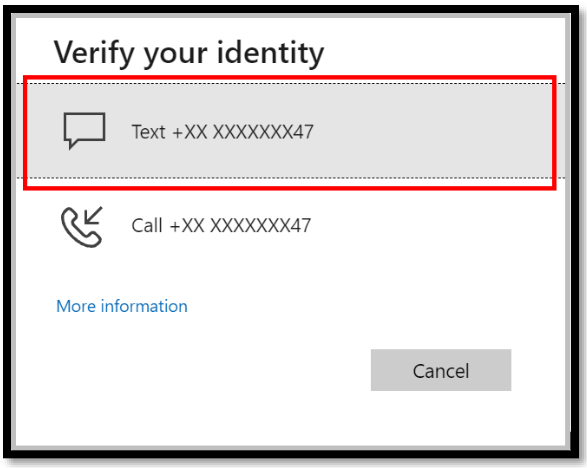
1. Once you have received your CAMS username and password, go to Chrome and enter the URL of either the Sandbox or Live system.

(Sandbox: https://svdp-trn-crm-02.crm6.dynamics.com/main.aspx?appid=2ff23c3e-0f47-4500-8119-10f62bbf8647&pagetype=entityrecord&etn=svdp_camsinteraction&id=2c36459f-a110-ee11-8f6e-000d3ad1400f or live system: https://svdp-prd-crm-02.crm6.dynamics.com/main.aspx?appid=2ff23c3e-0f47-4500-8119-10f62bbf8647&pagetype=entitylist&etn=contact&viewid=f79ef9fd-5172-eb11-a812-000d3acbab44&viewType=1039)

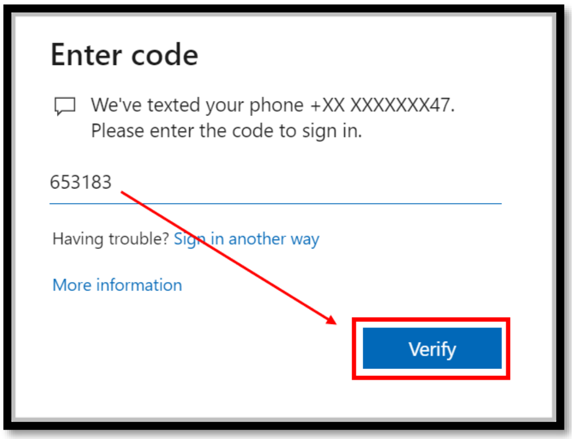
2. Enter your Society email address then click Next.

3. Enter the temporary password you were provided with

4. Select how you want to receive the verification code. (This is a multi-factor authentication code to ensure the security of the system)



5. Enter the 6-digit code sent to your mobile number via SMS or received as a voice message, then select **Verify**.



6. Click “**No**” if the computer is shared with other members or is a home personal computer.

If you are using a shared computer, make sure you log out, so the next person isn't using your sign in. Do not share your password with any one because if there is any discrepancy of data from your log in, you could be held accountable.

You will have to enter your username, password and code which will be sent to your mobile, every time you sign in to CAMS. Make sure you have your mobile phone handy while logging in to CAMS. If you change your mobile number, email the new number to CAMS inbox (cams.support@vinnies.org.au).

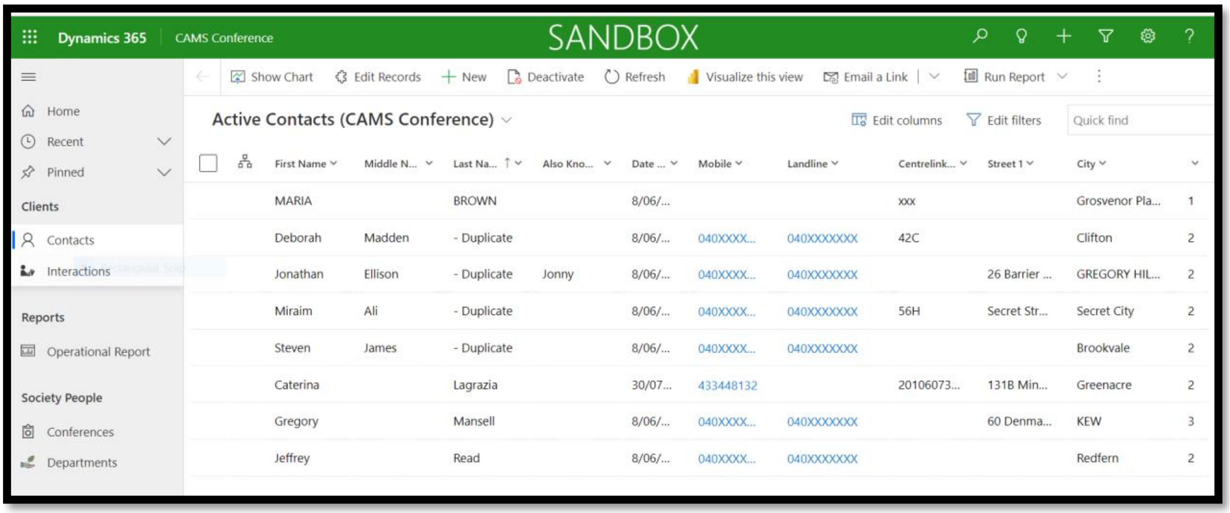
Now that you have access, you can start using the system to record information about our clients, as well as the interactions you gave with them. Some of the functions you'll be able to perform on CAMS are:

1. Searching for a person
2. Creating a new profile
3. Creating an interaction
4. Recording assistance that is given including referrals, and
5. Creating a report

3. Profiles

3.1 Searching for a person's profile

1. When you first log in, you'll see a page that looks like this. This is called the home page and it shows a list of names of the people we assist. Whenever you are asked to provide assistance to or visit a person, the first thing you will need to do is see if the person already exists on CAMS. You can use the **Quick Find** box in the top right-hand corner to search for a person. There is also a search bar at the top of the page, **but you should only ever use the Quick Find.**

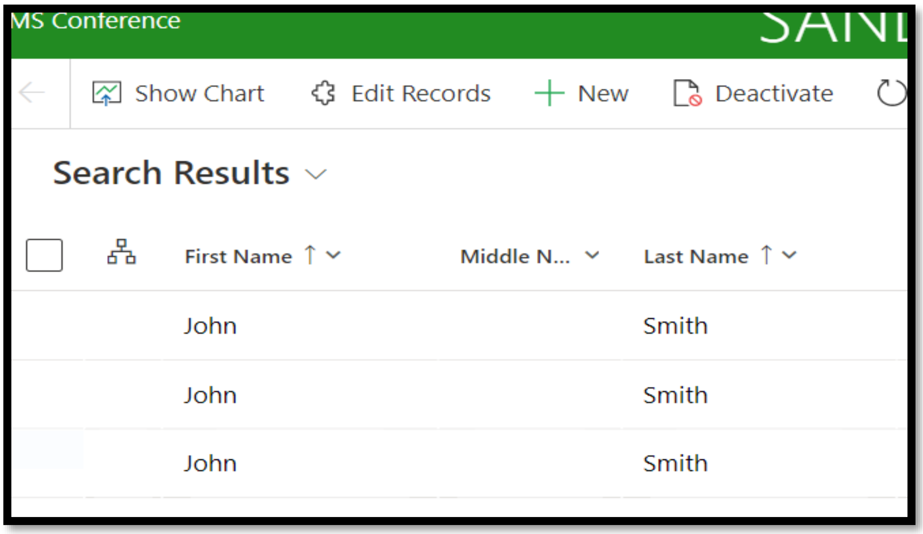


There are many search terms you can use like:

- names
- dates of birth
- addresses
- email
- phone numbers

> **NOTE:** The quick search feature also contains two government identifiers – Medicare number and Centrelink CRN. Government identifiers are a particularly sensitive form of identification, and the Privacy Act states they must not be used as a search term in the first instance. They may only be used for clarification purposes if two or more profiles appear when doing a name search and you can't differentiate between the two using another identifier like the date of birth.

2. The relevant search results will appear based on your search query. If a name is common, like John Smith, CAMS will produce multiple results.



3. If you think this is the person you want, you can click the mouse twice on that row and it will open up a new page with that person's details. You'll be able to tell from the basic details that this is the person you're looking for.

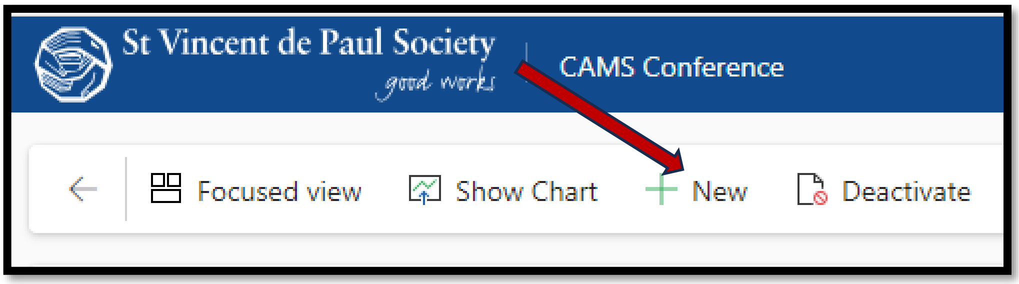
If there is no client matching the details you've typed in, you will see a message that reads:
No data available. If you see this, you can create a new profile.

> **NOTE**: Sometimes you see multiple results for a person and after checking, you discover that there are two profiles for the same person. These profiles will need to be merged. Members and volunteers don't have the ability to merge, so if you see two or more profiles that need to be merged, you should contact your trainer champion (Member and Community Engagement Coordinator, VSC Coordinator, or Volunteer Manager), and they will either do it themselves, or contact CAMS support

3.2 Creating a new profile

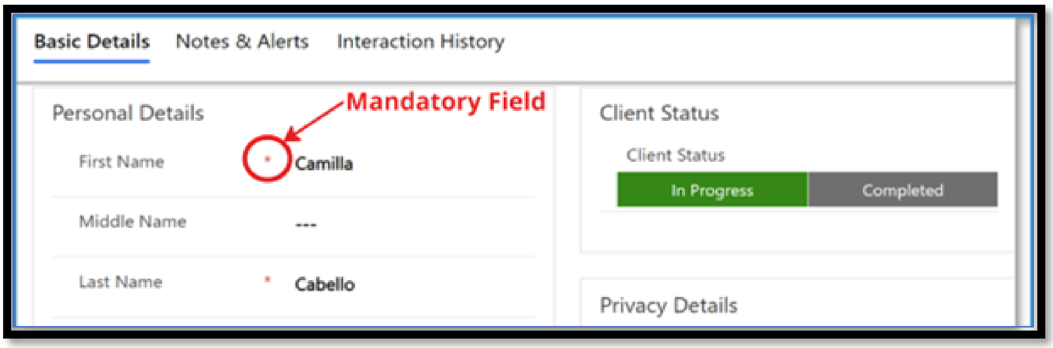
3.2.1 Creating basic details

Once you see a client is not yet in the system, you can go ahead and create that client. Just follow these steps.



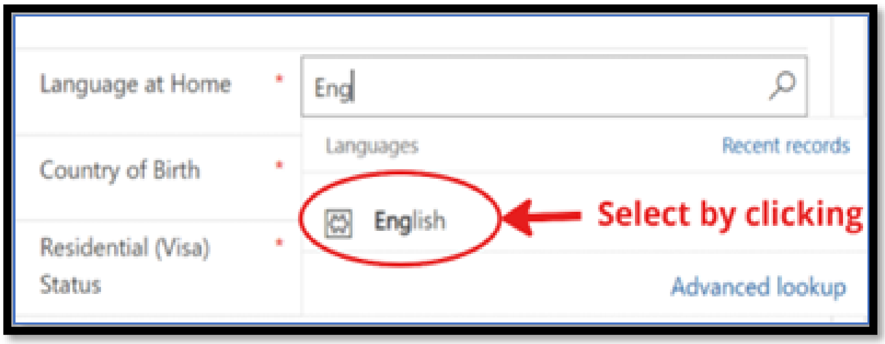
1. Click **'+ New'** in the top section of your screen. This will open the first Tab called **'Basic Details'**. You'll see two columns, one down the left side of the screen, and one on the right side of the screen.

2. Fill in the left-hand column. Fields marked with the **red asterisk** (*) are mandatory. You will not be able to save the client file without filling in those fields.

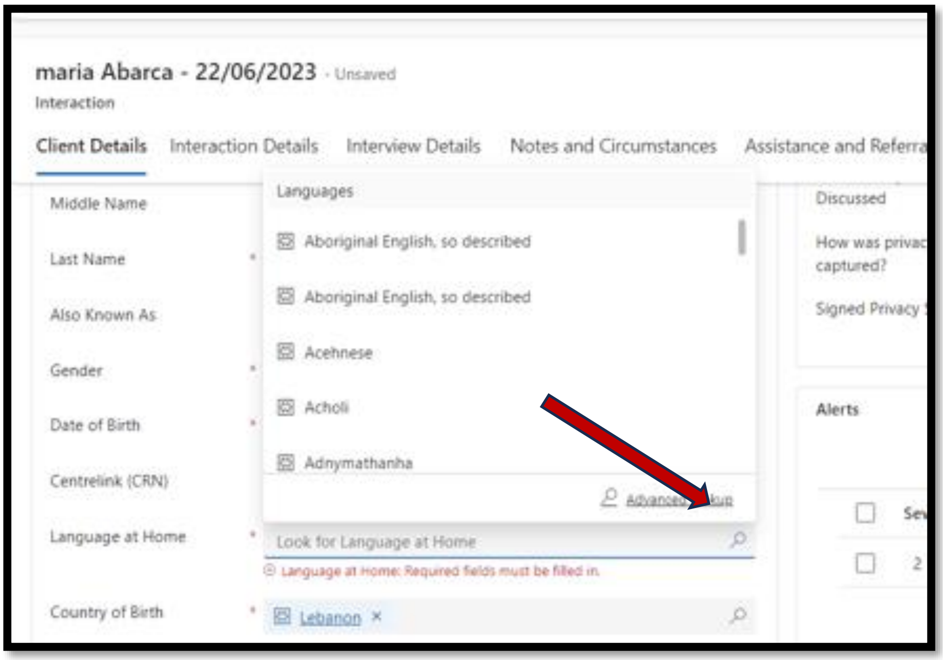


As you enter client details into the system, you sometimes find fields with multiple options and select one. An example of this is the 'Language at Home' field. When you hover over the field, 'Look for Language at Home' will appear. When you start typing the first letters of a word like 'English', the whole word will appear. You should do this for any field that has a magnifying glass.

NOTE: When you fill information like language at home and aboriginality, make sure to ask questions before filling up the information. Do not assume the answers for clients. Just because someone speaks English does not mean it is their first language.



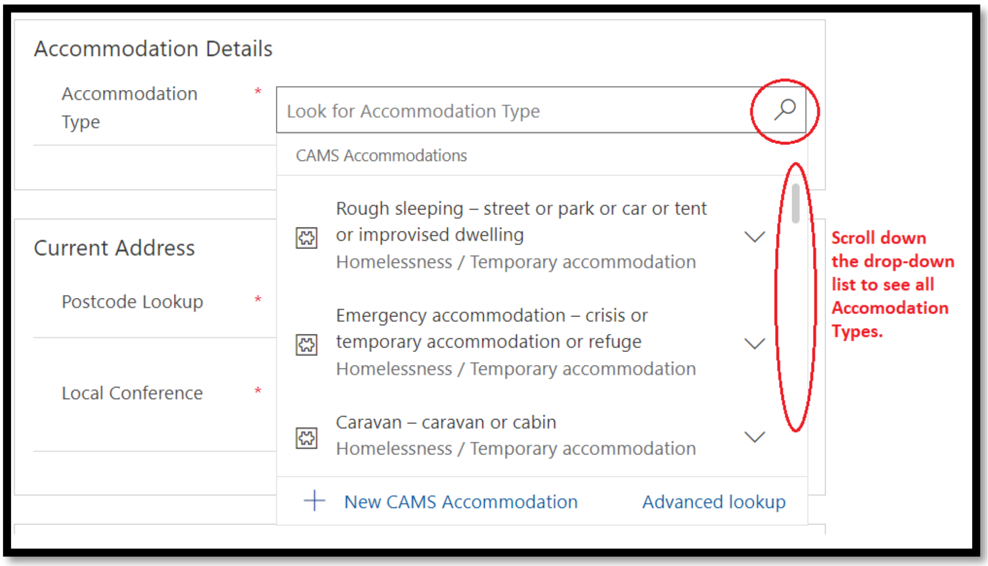
Multiple options can also appear as a drop-down box with an arrow at the top right-hand corner. In this case, click on the arrow, and scroll down the list until you see the option you want and click on it. This will fill in that field for you.



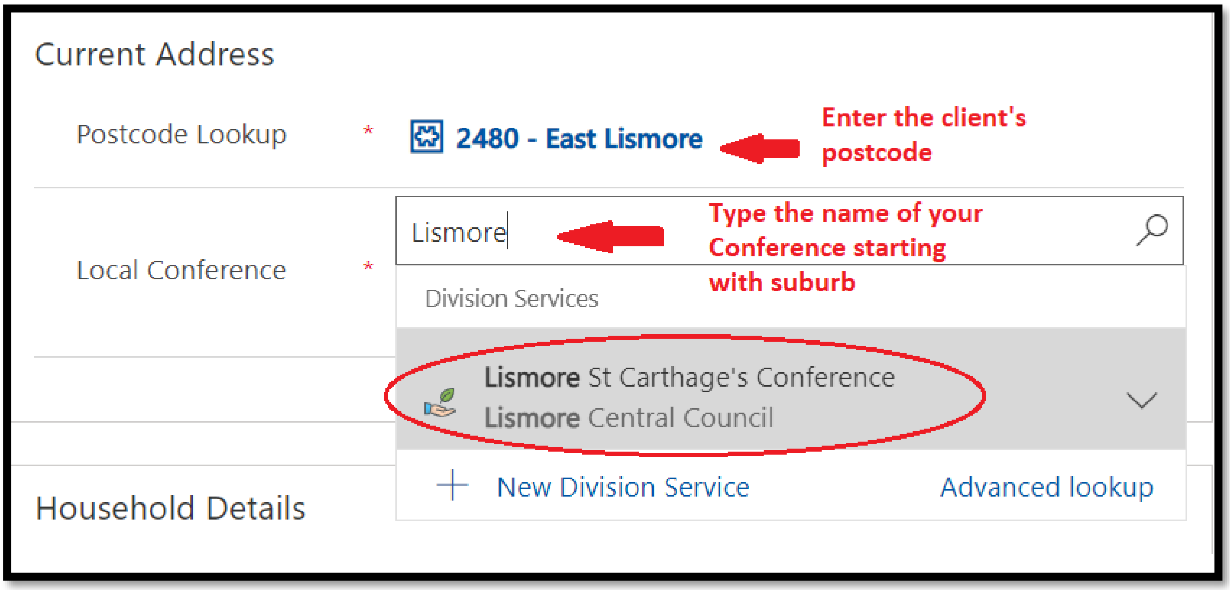
3.2.2 Accommodation details

Accommodation type also requires use of a drop-down menu. There are a number of options to choose from, including a number of options for homelessness. These include:

- Couch surfing
- Temporary or emergency accommodation
- Sleeping rough

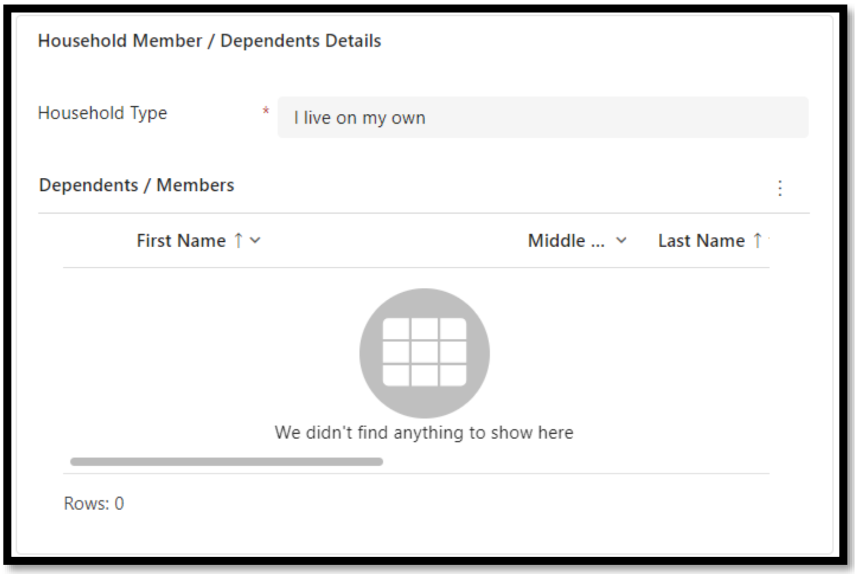


To enter a person's current address, you should start with the postcode. If the person is sleeping rough or in transitional housing, this is all that is required. Full addresses are mandatory for private rentals or non-temporary housing. The local Conference is also a mandatory field.



3.2.3 Household details

The household details determine the number of additional people we are assisting and whether the household members are children. It is important to collect this information so we can measure our total impact. The Safeguarding team use the information on children in a household. Only collect information about dependents from someone who is the parent or legal guardian



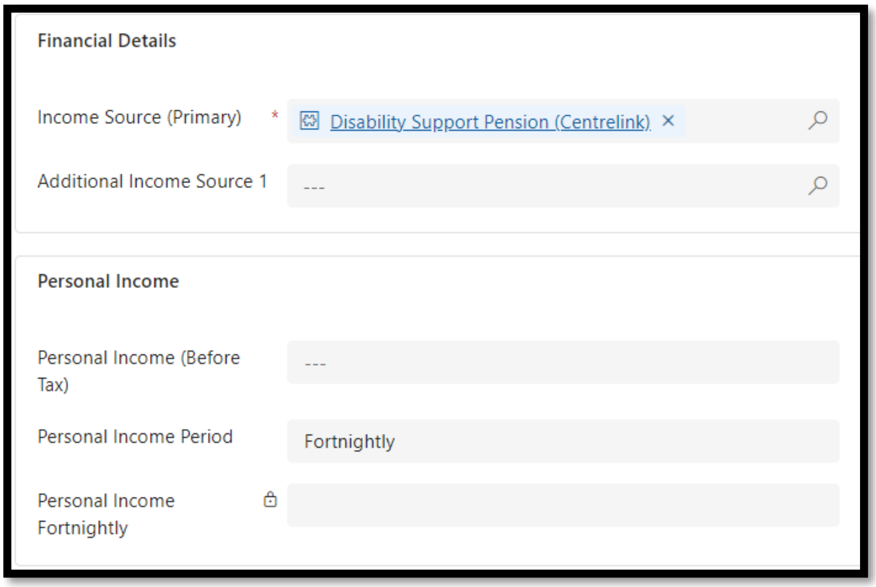
3.2.4 Financial details

CAMS gives you the option to record both personal and household financial details. This will mostly come from Centrelink income statements. **Therefore, we strongly recommend that members sight the details included in the document and give them back to the person you are assisting. Centrelink statements should NOT be uploaded to CAMS.**

The steps for entering income details are:

1. **Choose the primary income source** by clicking on the microscope and choosing from the drop box.

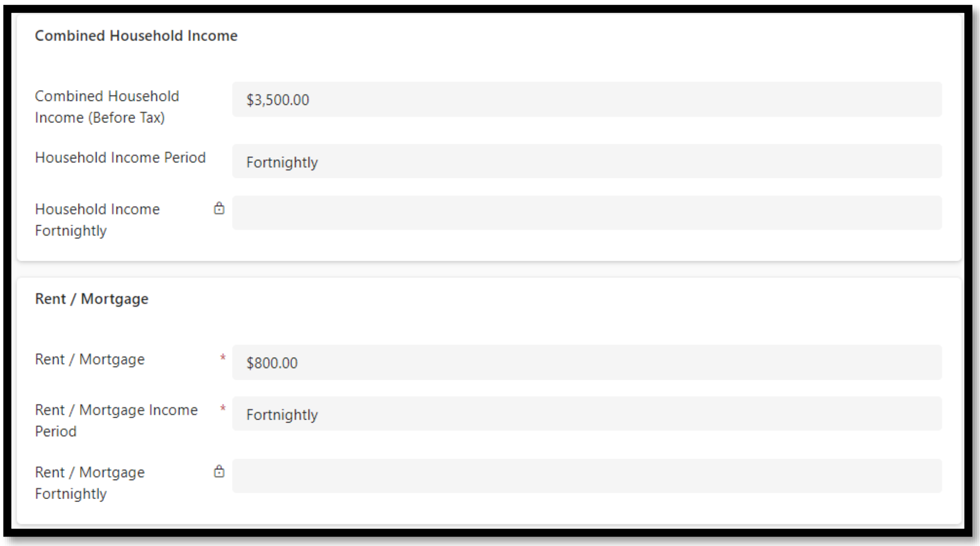
2. **Choose a secondary income source** (if applicable). The secondary income source refers to an additional source of income for the primary person you are assisting, note the income of someone else in the same household. So, if a person is getting a carer's pension, but has a casual weekend job, the weekend job is the additional source of income.



3. **Enter the personal income.** Personal income means income before tax, and we enter the fortnightly amount as a rule.

4. **Enter the combined household income.** This is where you include the income of additional household members, along with the primary person.

5. **Enter the fortnightly rent or mortgage.** If the person is not paying rent or mortgage, type $0.



3.2.4 Known disabilities

There is a window that asks whether the person has any known disabilities. This information is required by the NSW Government, so they can provide us with adequate funding, and so we can advocate for people with disabilities. **You should explain why we are collecting this information to the person you are assisting.** Members need to fill this in. To record these details, follow these steps:

1. If there is a known disability, **click on 'Yes'.**

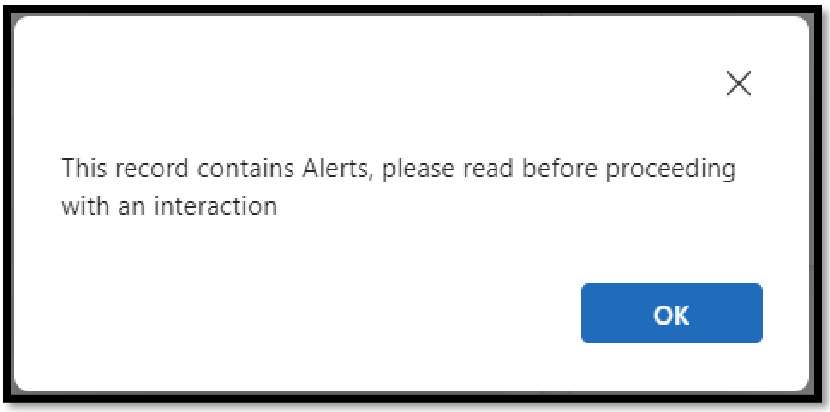
2. **Record a few notes** in the 'Notes' section

3. **Click on the actual disability type.** It is mandatory to click on relevant disability type once you click 'Yes'. click on **Save.**

3.2.3 Alerts

Alerts are an important part of a person's profile. An alert is a communication tool for members that appears on the top right side of the screen. Alerts notify other members if there are things to be aware of, for example, if the person is aggressive, or if there are a lot of stairs at the property. Some alerts are quite serious, but others are just for information.

1. If you see a profile that has only zeros in the alert box, this means there is nothing about the person, their property, or anything else that is a cause for concern. However, if a profile does contain an alert, you'll see a box pop up onto your screen like this:



2. If you see this box, click on OK and click on the numbered box. For example, the red box contains an alert, so I can click on it and see what it says. The Alerts feature was designed to

let members know about potential safety issues, so always make sure you read the alerts when the pop-up appears.

In this case it describes aggressive behaviour, so it would be a good idea to discuss with regional staff or your Conference President if it is worth going on the visit, or if some other arrangements can be made.

Sev...	Name	Description	Next Revi...	Expiry ...	Created By
1 - ...	Safety - Aggressive Behaviour	has shown aggression to member during previous visit.	30/01/2025	30/07/2025	Linda Paull (Available)

Alerts can be categorized in different ways:

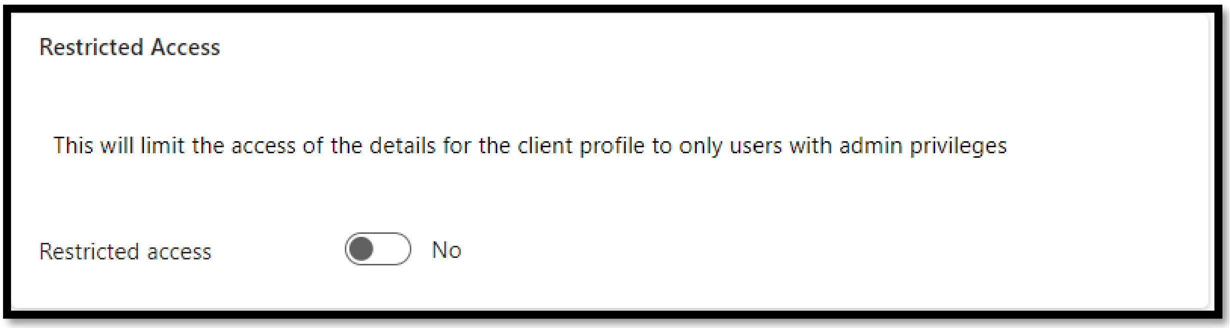
- By severity, i.e. red, yellow and green, or
- By type, i.e. accommodation. Health or legal, which can be broken down into sub-categories.

Alerts can sometimes have expiry dates, and when they expire, they will stay in the Alerts history. Expiry dates are usually applied to alerts related to people who have been excluded from service.

3.2.4 Restricted Access Records

There are some circumstances where a record may need to have an extra layer of privacy. This is often a situation of domestic violence where a person does not want to risk being found. In this case, we can create a 'Restricted Access' record.

To create a restricted access record, just click on the toggle that says, 'yes' or 'no' and click it over to 'yes'.



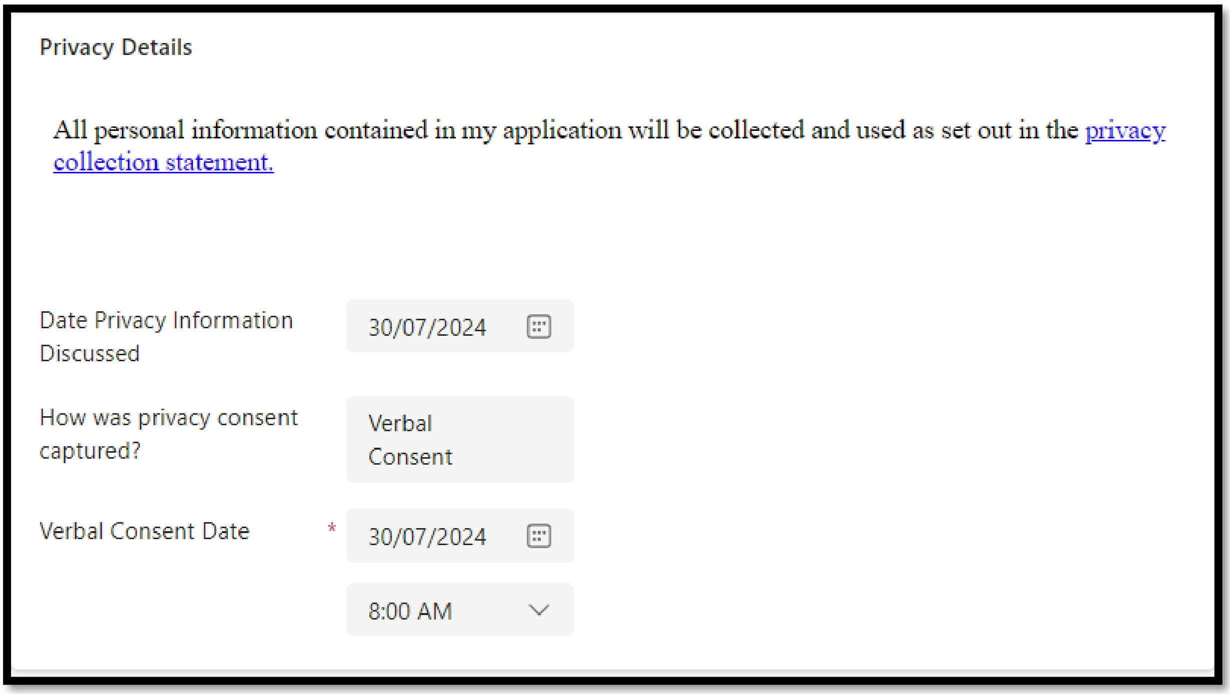
If you open a profile and you're unable to view the details because it has marked 'Restricted Access', check your regional staff member (Member and Community Engagement Coordinator), and ask for their assistance. Even the person who created the record, won't be able to see it after it has been marked as restricted.

3.2.5 Privacy Details

It is important that we always get consent from a person **every time** we gather any of their personal details. Of course, you will collect this at the first visit, but you will need to explain why you are collecting information and get their agreement (consent) at subsequent visits if you are collecting

new or updating existing information. You will need to explain that some personal details need to be collected for reporting to the NSW Government (for funding purposes), and to allow the Society allocate resources effectively, and to advocate for people living with different needs.
This consent can be obtained via the Consent form or verbally. You can either read the form, or read the following version:

> I acknowledge that the Society has provided me with this privacy collection statement, and that:
> • I have read and understood this statement;
> • I can access a copy of this statement at [Insert website address]; and
> • I can contact the Society's Privacy Officer to discuss any queries or concerns I have, or any complaint I would like to make, about the handling of personal information by the Society by email:
> privacy@vinnies.org.au or phone: 02 9568 0262.
> I understand and consent to the Society collecting, using and disclosing health information and other
> sensitive information about me and my dependents (for whom I am their parent or legal guardian) as
> described in this privacy collection statement. These circumstances may include (amongst others) in the
> Society's dealings with my dependents and other members of my household, unless I have expressly
> asked the Society not to do so.
> In making this acknowledgement I understand that the Society may:
> • use and disclose personal information to provide me with the services and programs I request, and to provide me with information about other services and programs that may interest me;
> • collect, use and disclose personal information about me and my dependents (for whom I am their
> parent or legal guardian) in the Society's dealings with other members of my household if they are or become a Society client, unless I have expressly asked the Society not to do so;
> • collect, use and disclose personal information about me and my dependents (for whom I am their
> parent or legal guardian) in the Society's dealings with my advocates and representatives, and with referring agencies, government agencies and other third parties who the Society deals with in the course of providing me with its services and programs;
> • use and disclose personal information and sensitive information for reporting and statistical purposes in accordance with its funding agreements, and for internal business planning purposes;
> • seek to collect additional personal and sensitive information from me, and (if I choose to provide that information) use and disclose that information for reporting and statistical purposes in accordance with its funding agreements, and for internal business planning purposes;
> • use and disclose personal information for responding to media requests (if I provide my specific consent at the time of a media request and after being informed by the Society of the risks involved with a specific media request); and
> • use and disclose personal information in connection with the Society's dealings with those other members of my household, unless I have expressly told the Society not to do so.
> We need to collect your personal information so Vinnies can help you with the services you need, sometimes share with the government to get funding for these services and also to allow Vinnies to advocate for people like you.



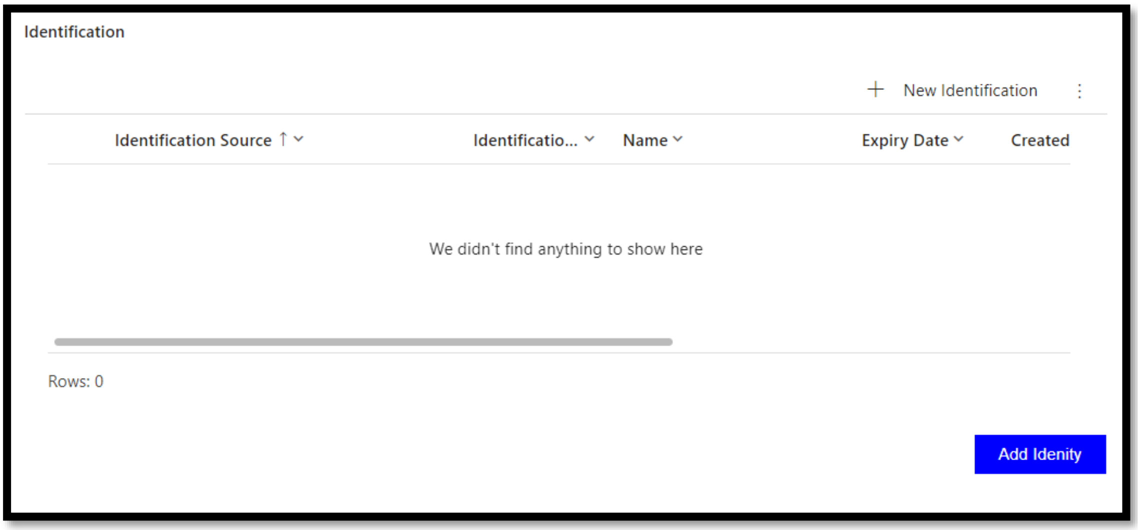
You'll see that CAMS requires us to record the date on which we obtained the consent, and the method. There are two options for collection – verbal and physical consent (a signed form). Verbal consent is enough.

It is important that **every time you gather important information about a person** during an interaction, and you're going to enter this information into CAMS, you explain why you need it and what you're going to do with this information.

The Privacy Act forbids us from collecting and saving unsolicited information that is unnecessary to the service you are providing. So, if somebody tells you some personal information that is not relevant to the matter at hand, don't put it in CAMS. This is explored further in the case notes training.

3.2.6 Identification

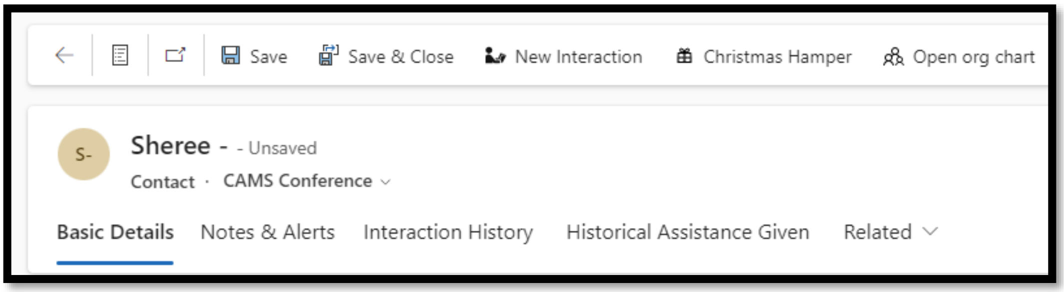
At the bottom right-hand corner of the profile page, you'll see a section called Identification. This section allows you to upload documents. In the past, it was common for members to upload documents like Centrelink income statements and driver's licences. However, storing identity documents on a system like CAMS is very risky, and should not be done unless instructed. An exception may be disaster relief, where you need proof of address, but the documents should be deleted once the disaster relief campaign concludes and any financial internal audit activities have finished.



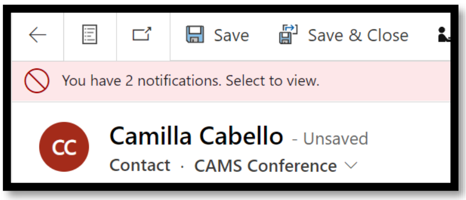
3.2.7 In progress and complete profile

Once you have entered all the details you can, you can complete the profile by clicking on 'Completed.' If you haven't completed all the fields, you click on 'in progress'. if your profile is left 'In Progress,' you won't be able to complete the interaction (the next step).

Then you can click on '**Save.'**



This brings us to the end of the profile creation process. If any information is missing, the system will tell you by displaying a notification message on the top of your screen in light red. It will also tell you which fields are missing. Click on the message and it will take you directly to that field. Fill them in and save and close again.



The next step in the creation of your interactions with the person you are assisting.

NOTE: Sometimes the Conference will receive requests from Vinnies Assist. This is because the person has called the Vinnies Assist hotline. As Vinnies Assist is a call centre, the staff only gather enough data to brief the members that there is a person who needs assistance from them. Therefore, their files will always be incomplete. You will complete the information on the profile page after you finish.

4. Checking the interaction history and case notes

When you were creating the client, you would have noticed a Tab to the right of the Notes and Alerts Tab that reads **'Interaction History**'. This will show past interactions and assistance that the person has recieved. It is a good idea to check these before you next create an interaction with them.

5. Creating a new interaction

Any time you speak with a PWA over the phone or conduct a visitation or meeting with a view to providing them with assistance, this is called an interaction. Interactions can be only created on CAMS when the profile has been created. To do this follow these steps:

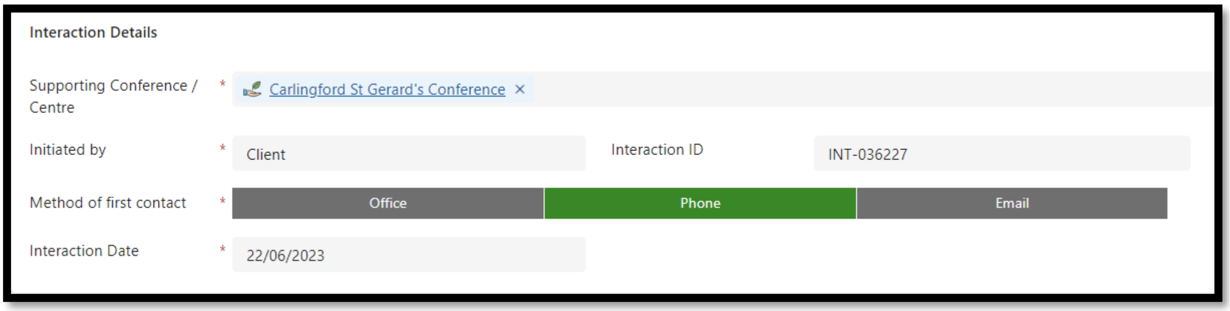
1. **Click on New Interaction** at the top of the page.

2. **Choose from the dropdown menu who initiated the interaction.** This could be the client themselves, someone else from the Society, or a third party (known as a referral).

3. **Ensure the name of the supporting conference or centre is correct.** This information will be brought over to this page from the previous page.

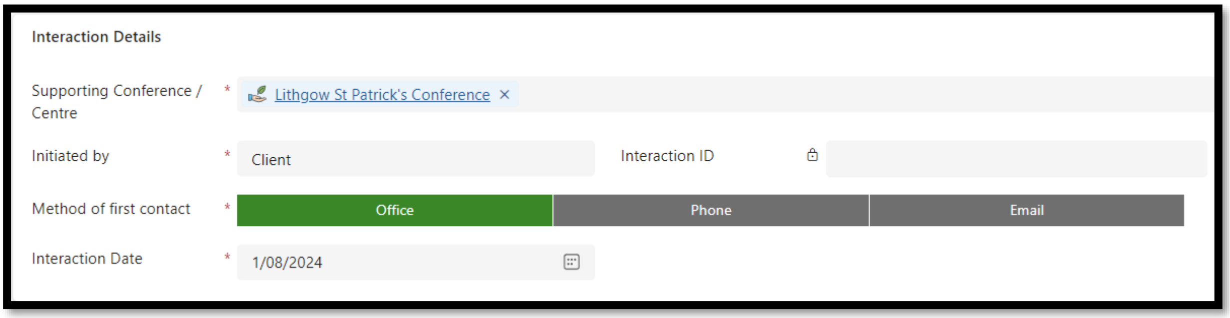
It is possible to change the Conference at this stage if there is a Conference other than the regular Conference providing the assistance. This may be the case if a person is travelling to another city but will return home.

4. If you want to change the Conference here, click on the 'x' to delete it.

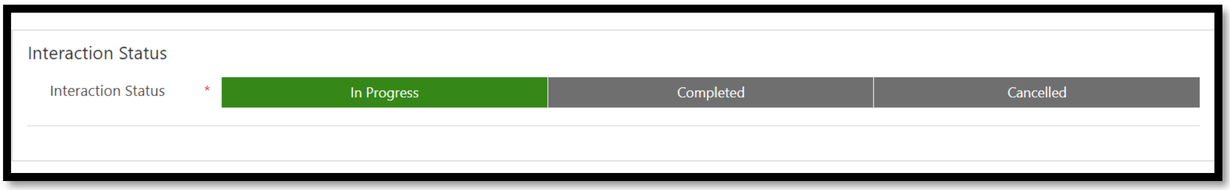


5. Click on the magnifying glass to search for the other Conference, and start typing the name of the new Conference, starting with the town or place name.

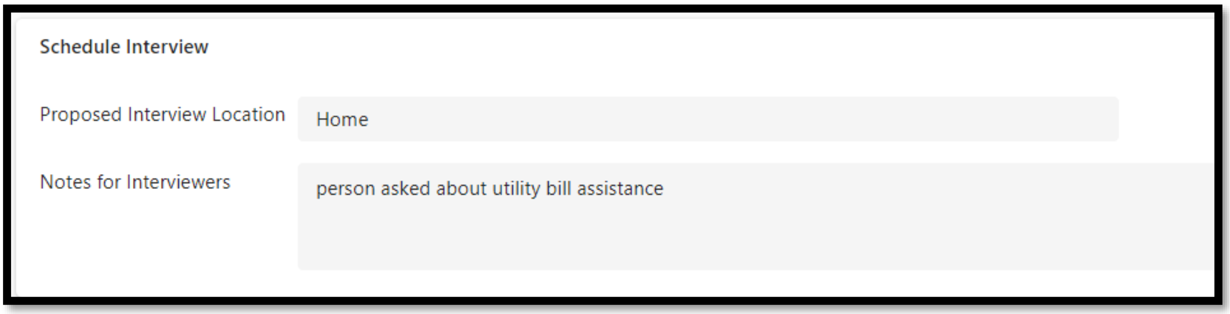
6. **Enter the 'Method of first contact'** by clicking on either Office, Phone or Email. This will tell us how the client first came into contact with you. In this example, the person walked into one of our hubs so 'Office' has been selected.



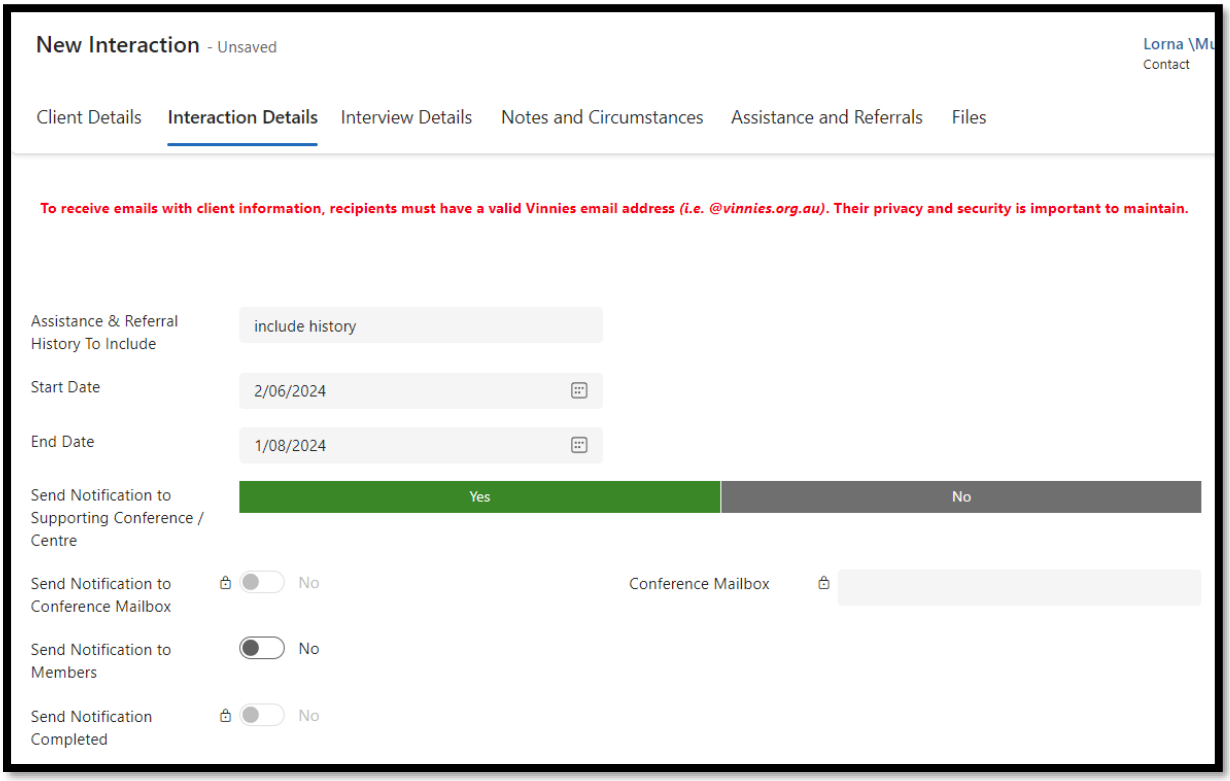
7. **Leave the interaction in progress.** This is because we haven't spoken to or visited the person yet. We can only complete it once the assistance has been given.



8. **Schedule the interview location.** The drop-down menu gives you the option of choosing home, office, phone or other. You can add reminder notes for yourself or another member about what was discussed in the original conversation.

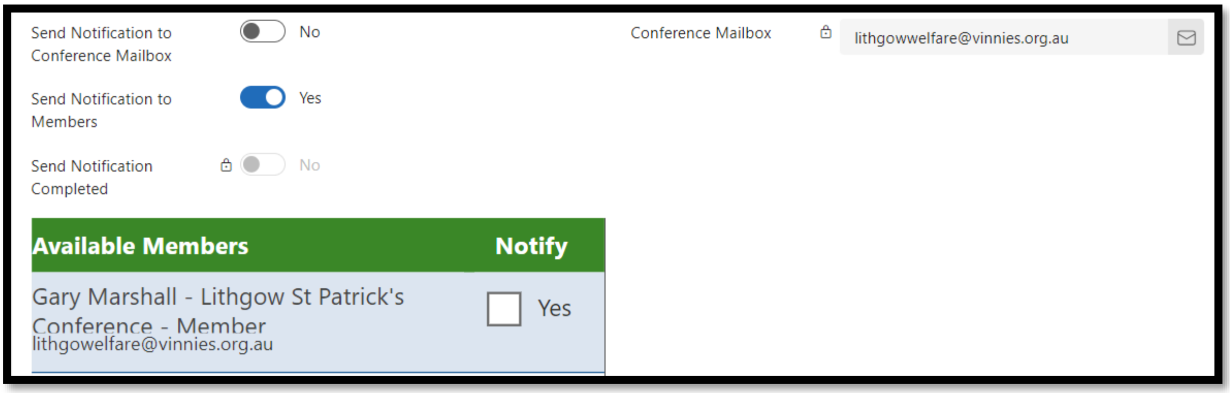


9. **Send the notification.** The notification feature will give you the option to include or not include a history of past interactions. If you include a history, you can select a start and finish date, so if they started seeing you in June, you can select that date and include the history up until today. You need to click on 'yes' if you want the notification to go to another member.



10. Select the recipients from the interactions menu. You can do this by setting the 'Send notification to members button to 'Yes'. Once this is done, you'll see a list of available members appear and you can put a tick next to the one you wish to notify.

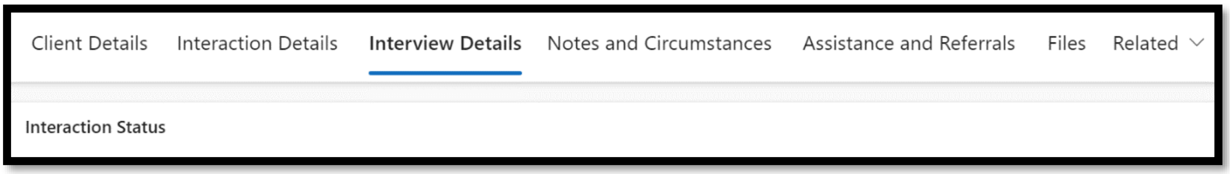
NOTE: Since CAMS has been implemented across the state, different Central Councils and Conferences have chosen to use this feature according to their own way of working. Sometimes only one member per Conference appears in the drop-down list, and that member notifies other members in their Conference about incoming requests. In metro areas, which are supported by a hub or Support Centre, you may see a staff member's name or you may see a long list of staff, members and volunteers. Some Conferences have their Conference mailbox as the nominated email address for all notifications to go to. All these ways of using the notifications feature are valid. It's one way in which the system can be flexible to meet the needs of the different users.



NOTE: Sometimes you may expect to see your name or another member's name in the drop down list of people for notifying but it does not appear. In this case, it maybe because you have become inactive due to not being up to date with your compliance training (Code of Conduct and Safeguarding) and background checks. If you do not see your name, check your compliance status, or contact regional staff, and someone can follow this up.

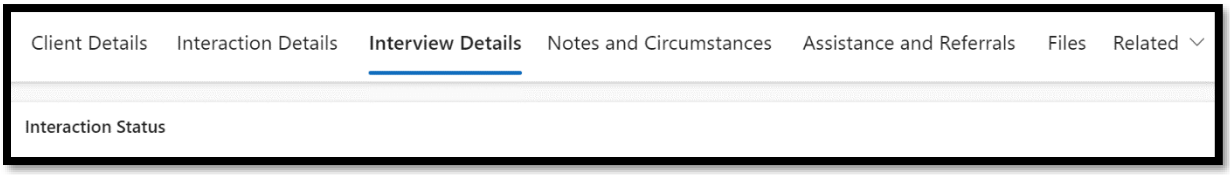
Once you have finished scheduling the interview, you have everything you need to do prior to the interaction taking place. The next step is to actually carry out the visitation. During the visitation, you'll be gathering information about the person you are assisting, their circumstances and the type of assistance they need, including any referrals you made. In the next section, we'll discuss how to record this information on the system.

As you work through recording this information, you will be working through the different headings at the top of the page, working from left to right. The Client Details is the profile you completed, and the Interaction Details were completed in the previous step.

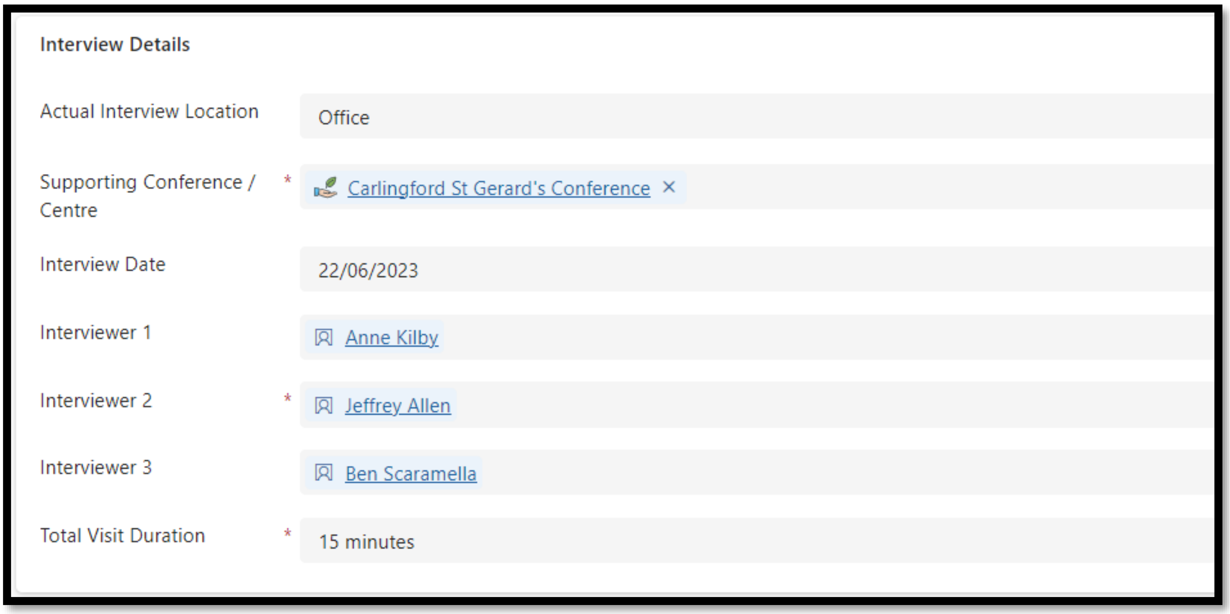


6. Recording the interview details

Once you have completed your visitation or other type of interaction. You need to record the basic details of the interview on the 'Interview Details' page.



1. **Enter the location of the interview.** You can choose office, home, phone or other.



2. **Enter the date** using the calendar feature.

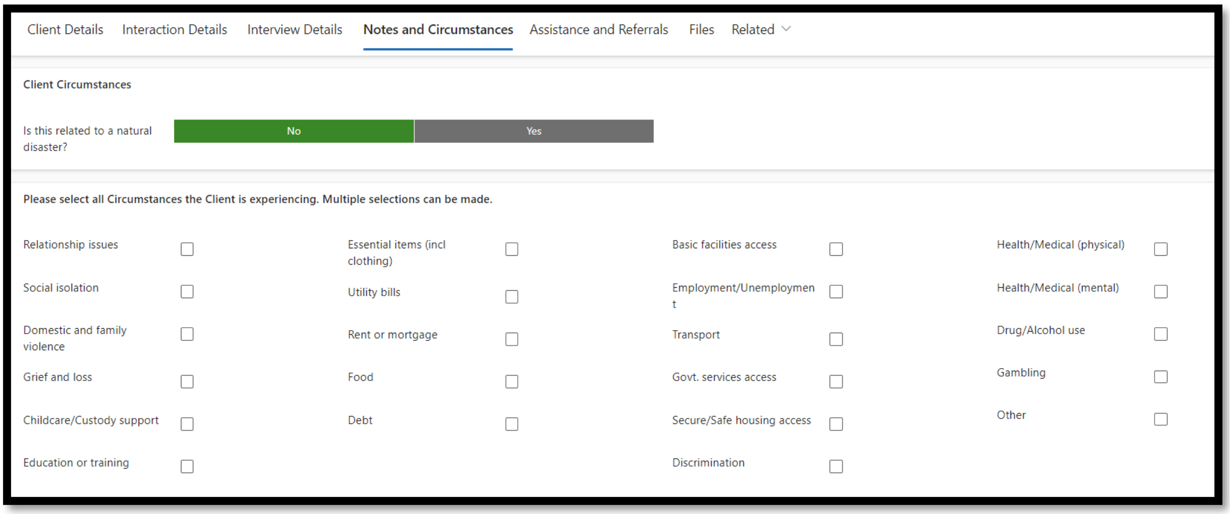
3. **Enter the names of the interviewers.** The names of Conference members are already stored in CAMS and will appear on a drop-down list. You need to enter 2 or more interviewers for a home visit.

4. **Enter the total duration** of the visit from the drop-down menu.

7. Notes and Circumstances

The notes and circumstances section is where you record information that you gathered while interacting with the person. The page contains a list of circumstances like this. You can tick as many of these circumstances as you think relate to the person. In fact, we encourage you to tick all the ones that are applicable because sometimes different areas of the business want to understand, for example, how many people are presenting with drug and alcohol problems or domestic and family violence, so we can understand trends that may be occurring in different parts of the state.

NOTE: There is a question at the top of the page asking whether the circumstances relate to a natural disaster. This is because when the Society provides disaster relief, this is also done using CAMS. You only click on 'Yes' if you are participating in a special program.



You now need to **add your case notes.** It is very important that when you add case notes, you ensure that the notes you are adding are:

- Relevant
- Impartial
- Accurate
- Complete, and
- Adhere to the Australian Privacy Principles in the Privacy Act.

There is training provided called 'File and Case Note Training for Members and Volunteers' that provides guidance on how to ensure your notes meet these criteria. But some rules of thumb are:

1. **Is it relevant?** Does the information refer to the assessment, on-going support, decision-making, follow-up, or exit and closure of support?

2. **Is it impartial?** Are you being objective and respectful to the person's dignity, culture, personal beliefs, values and abilities?

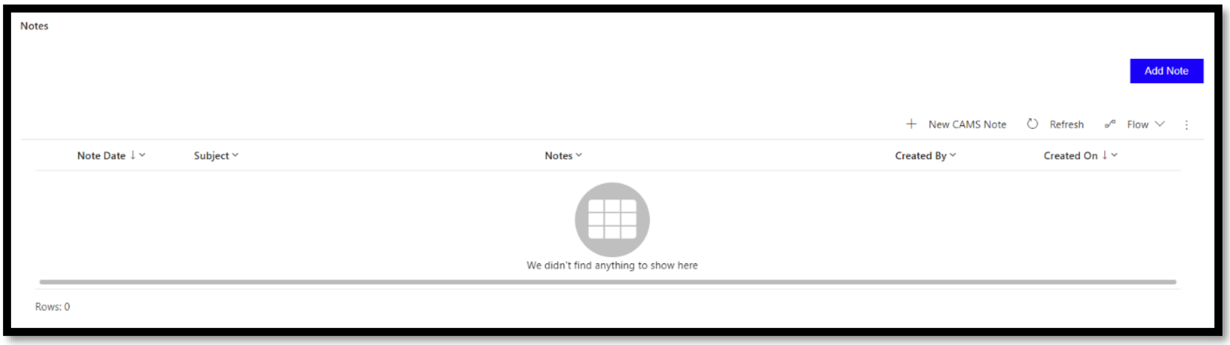
3. **Is it accurate?** Are you factually describing events to answer the 5 W's (Who, What, When, Where and Why?)

4. **Is it complete?** Does it have a title and date, include full names of the person we are assisting, include phone and cancelled meetings, as well as the face-to-face meetings?

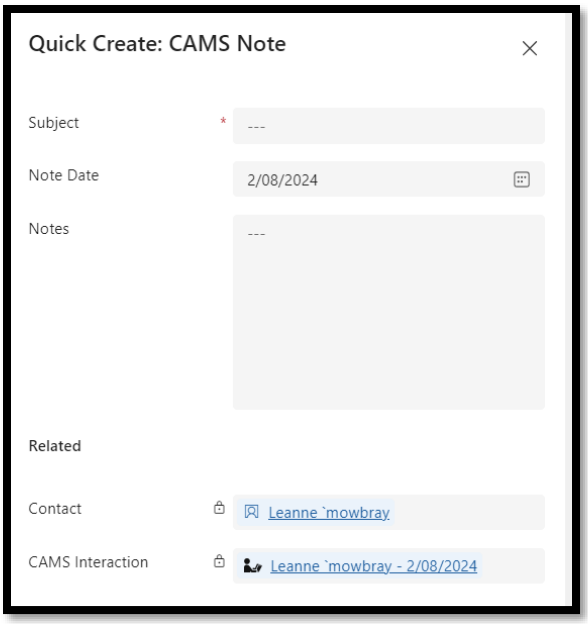
5. **Does it adhere to the Australian Privacy Principles in the Privacy Act?** Does it only contain details about the person and their household that are reasonably necessary for Society functions after consent has been obtained?

Once you are satisfied that your note meets these criteria, you can enter the note under the 'Notes' section by:

1. **Clicking on 'Add Note'** to open a new note box.



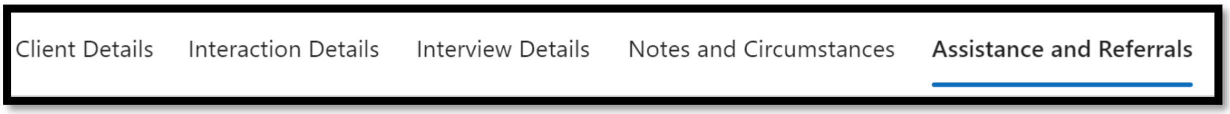
2. **Filling in the 'subject'** with a heading that summarises the main message of the note and the date.



3. **Write the note**. There is no limit to the characters you can use.

4. Click **'Save and Close'.**

8. Assistance and Referrals



The first thing you will see when you move to the Assistance and referrals page is current status of the interaction. This will still be at the 'In Progress' status because we have not recorded the assistance that has been given out.

Here are the steps you need to follow to record assistance that has been given out:

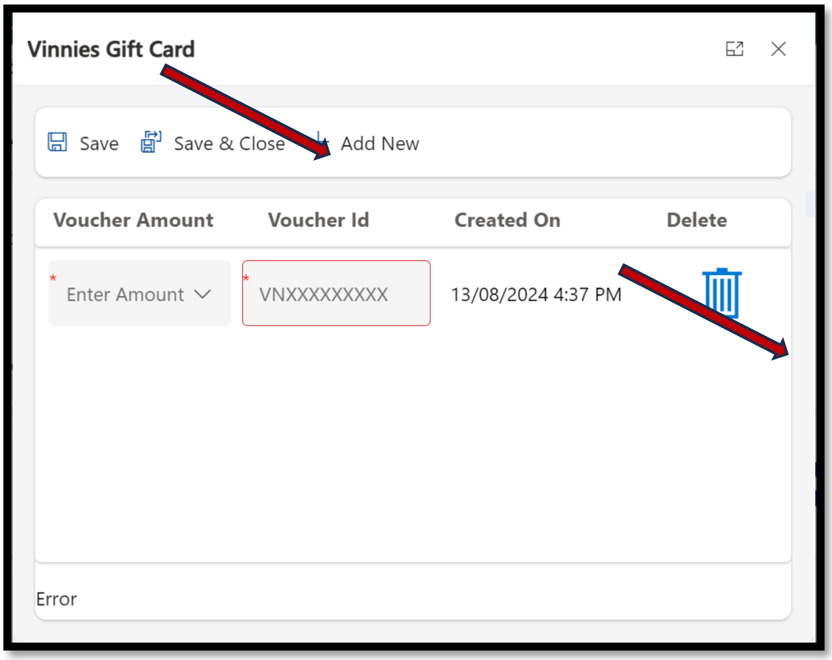
1. Where it asks, **‘Will you be giving out at least one assistance item?’**, click **Yes.**

2. You’ll then see two options, **Vinnies gift cards** or **assistance given**

8.1 Adding a Vinnies Gift Card

Vinnies gift cards are like a credit card that come in denominations of $30, $50 and $100, and can be redeemed at any retail store. They are recorded separately in CAMS from other types of assistance because of their relationship to the retail stores. Vinnies Gift Cards look like the image below.

1. If you click on **Vinnies gift card**, a new light box will open:



2. Click on the drop down and add the **amount** ($30, $50 or $100) and add the **voucher ID** from the back of the card. The date should be today's date.

3. If you would like to issue a second card, click on **Add New**, and a second row will appear. If you make a mistake, you can delete using the **bin icon.**

4. Click **Save and Close**.

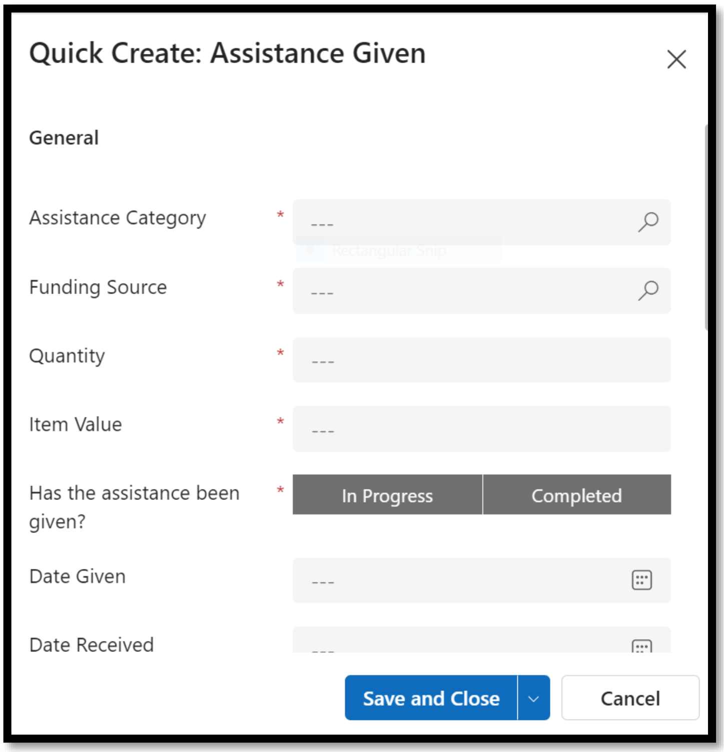
8.2 Adding other assistance items

Other assistance items can be items with a monetary value like food vouchers and cards, bill assistance and furniture, or it can be non-material like pastoral care and advocacy. For assistance that has a dollar value, this needs to be added as you go.

To enter other forms of assistance, these are the steps:

1. Click on **Add Assistance Given**

2. A new light box window will appear:



3. You need to first choose the **Assistance Category**. You can choose from:

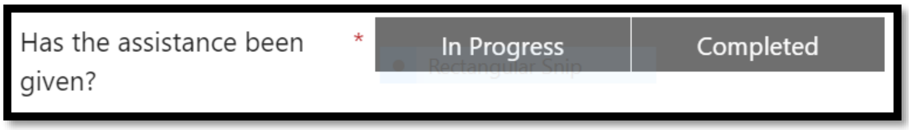
- Accommodation
- Advocacy and support
- Christmas hamper
- Clothing
- EAPA
- Food parcels and vouchers
- Other materials assistance
- Other non-material assistance
- Transport
- Utilities, and
- Medical

4. You then choose the **funding source.** In most cases this will be Society funding (i.e. coming from the Conference budget), however, some items will be funded from other sources, such as Government funding for EAPA vouchers.

> **NOTE:** Funding sources can vary depending on the item. The most common ones are Society Funding (where most of your assistance will come from, donated, or Government funded. Sometimes when you select an item, the funding source will automatically update.

5. Add the **item value**.

6. Next, you'll see the **status bar.**



In most cases, you can say the assistance is complete, but there are some cases where you need to leave the assistance given at **'In Progress'**. These are:

- Items that need to be delivered, like white goods and furniture, and
- EAPA vouchers, which take some time to be processed.

In these cases, you can say they are completed once you know the person has received the furniture item or the bill assistance has been received.

7. The following items are not mandatory to record, but you may wish to record them:

- Date given – the date you handed out the item
- Date received – the date the person actually received the item
- Provided by – the member who issued the item
- Voucher ID - the voucher or card number as it appears on the voucher or card

8. Click on **Save and Close**

9. Scroll down and you will be able to see the assistance under **Assistance Given** immediately.

Assistance Given — Refresh — Flow

Int...	Assistance Request T...	Name	Assis...	Q.	Item Val...	Total ...	Assistance Status	D
22/06/...	Food Voucher (Coles, ...	Food Voucher	AID-5...	1	$30.00	$30.00	Completed	
22/06/...	EAPA (Energy Accounts...		AID-5...	1	$200.00	$200.00	Completed	

8.3 Adding a referral

From time to time, the Conference is unable to provide the type of assistance the person requires, and you may need to refer them on for things like:

- Drug and alcohol counselling
- Budget counselling
- Domestic violence
- Gambling problems
- Mental health issues
- Emergency accommodation

Or a range of other specialist services that can't be provided at Conference level.

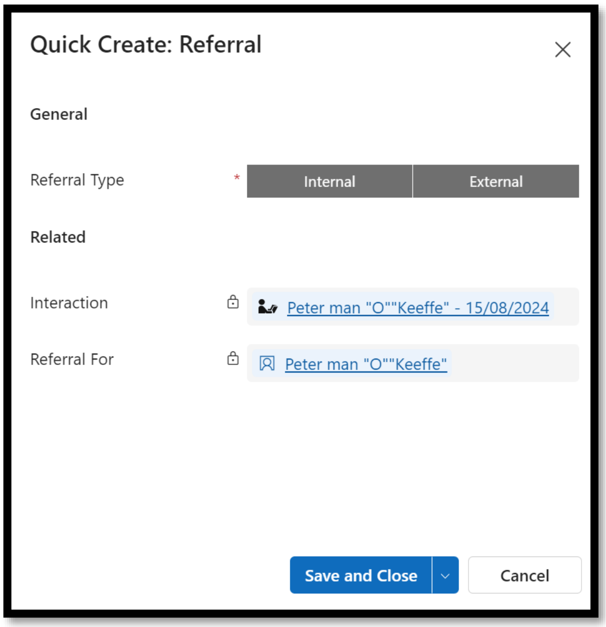
Sometimes these referrals will be internal (to Vinnies Services or to other Conferences, like specialist domestic violence or refugee Conferences), and sometimes they will be external. External referrals can be made to government or non-government organisations. An example of a government organisation would be Centrelink, and non-government organisation would be The Salvation Army.

8.3.1 Adding an internal referral

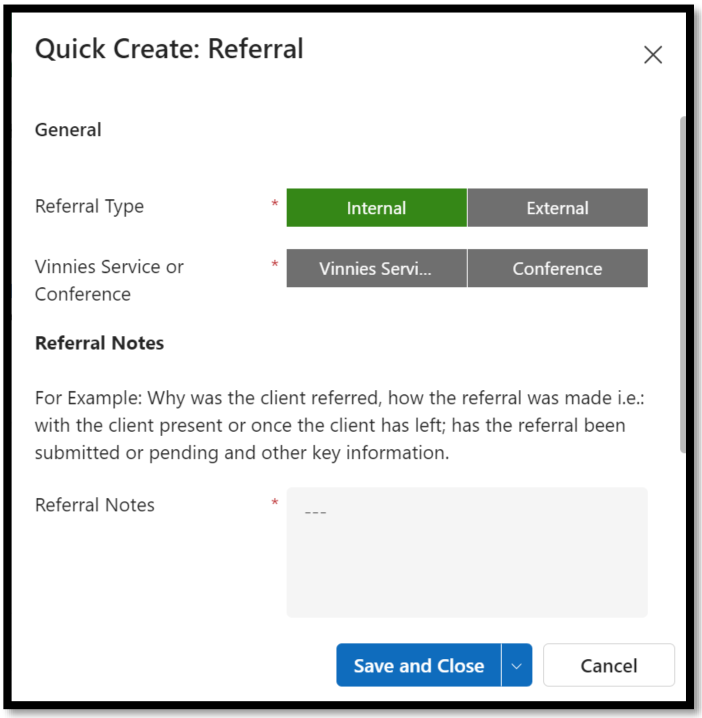
These are the steps for adding a referral:

1. Click on the **Add Referral** button to the right of the screen under **Assistance Given.**

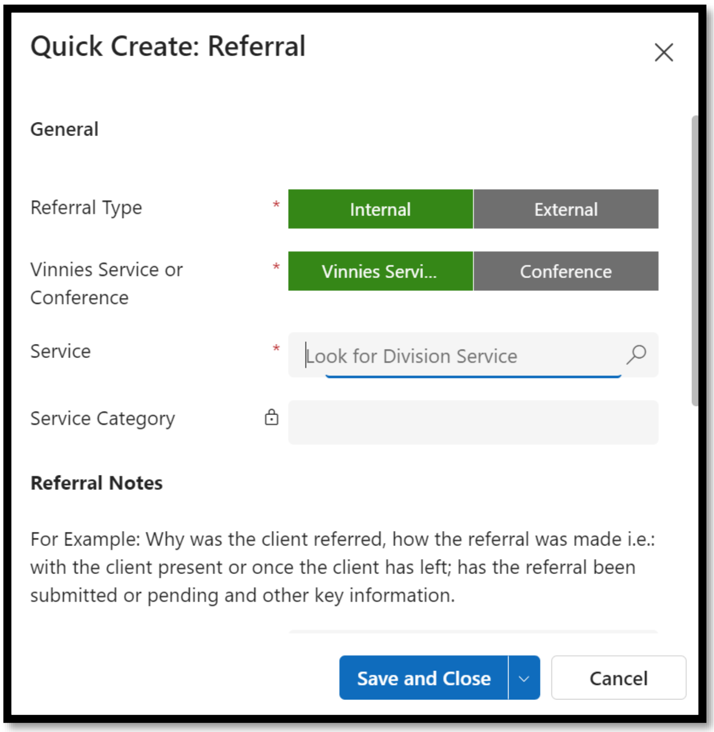
2. The following light box will appear:



3. Click on the **Referral Type**. In this case, we are choosing to make an internal referral, so you'll see two options appear – **Vinnies Services or Conference**.



4. If I click on **Vinnies Services**, a drop-down box will appear with a search function. You can start typing a Vinnies Service, like Amelie House, and it will appear. There is no need to enter anything in the **Service Category** field, as this is locked.



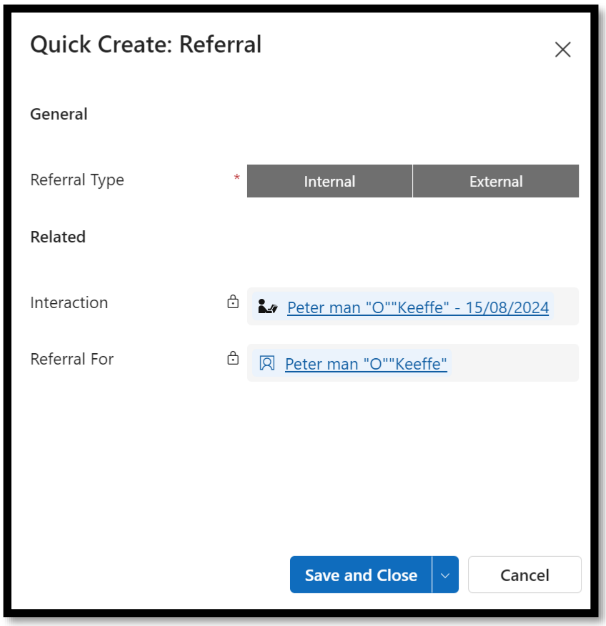
If you want to select a Conference instead, the same process applies. You start typing the Conference name, starting with the town or suburb and it will appear.

8.3.2 Adding an external referral

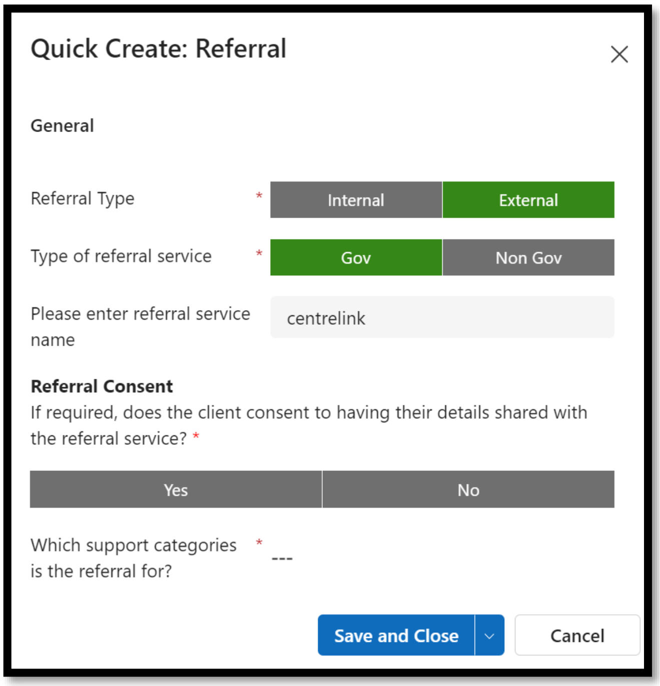
You follow a similar process for entering external assistance. The steps for adding an external referral are:

1. Click on the **Add Referral** button to the right of the screen under **Assistance Given.**

2. The following light box will appear:



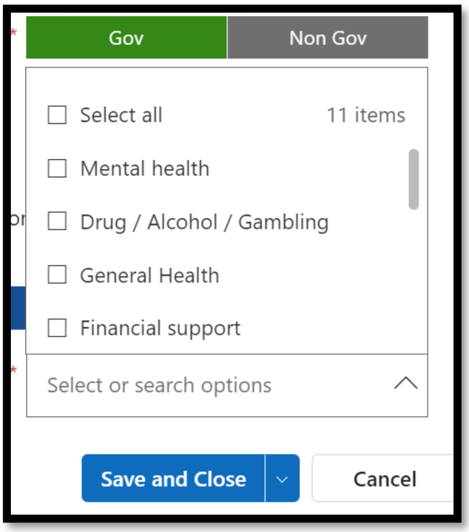
3. Click on **External.** This will give you the option of referring to a Gov or Non-Gov organisation.



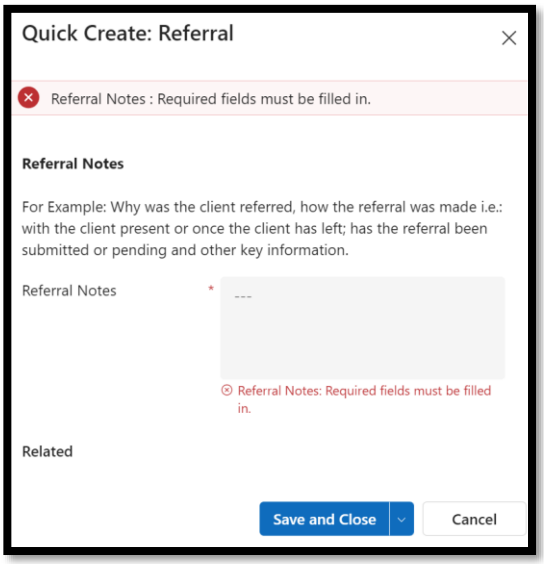
1. If you click on either Gov or Non-Gov, there will be no drop-down menu as there are too many services to include. You will type the name of the service.
2. Click on **yes** or **no** to indicate you have asked for and have their consent to give their details to a third party.

> **NOTE:** Getting consent before providing details to a third party is very important. If a person does not wish to provide consent for this, you can hand the details of the organisation over to them, and let them follow up on their referral. **DO NOT EVER GIVE A PERSON'S DETAILS OUT TO A THIRD PARTY WITHOUT CONSENT.**

3. Choose a category from the drop-down list, for example mental health, financial support etc.

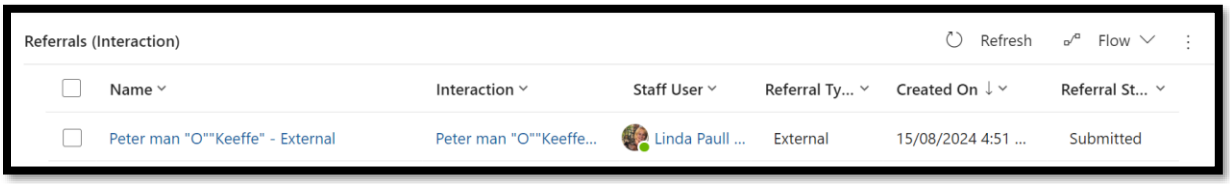


4. If you have selected an external referral, you'll need to enter some referral notes, including why the person was referred, how the referral was made, i.e. with the person present or after they left, and other key information.



5. Click **Save and Close**

6. The referral will appear on the list under the **Assistance Given**



8.4 Closing the interaction

By now, the interaction should be complete (provided all of the assistance has been given out), and the interaction can now be closed.

To do this, just scroll to the top of the page and click it over to **'completed'** and click on **Save** at the top of the screen.

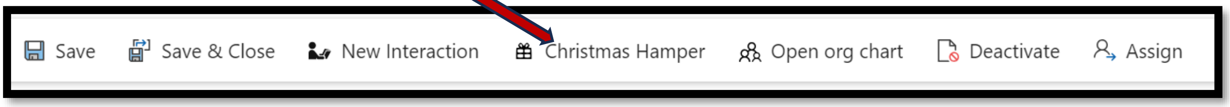
This brings us to the end of how to process a regular interaction. There are other functionalities that can be done in the system like reporting, managing Christmas hampers, and providing certain types of assistance. Instructions on how to use CAMS for these functions are below.

9. Recording a Christmas hamper

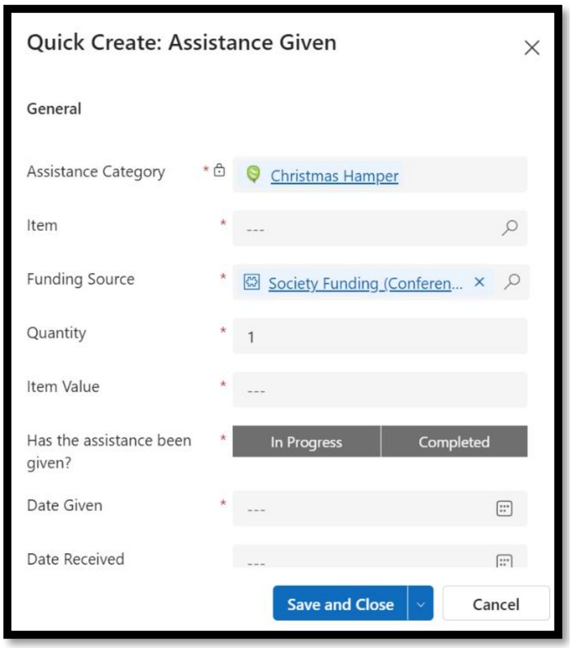
Every year towards Christmas, Conferences prepare a list of people they have assisted during the year to whom they want to provide a Christmas hamper. You must first check to see if they are an existing client, and if they aren't, a new profile needs to be created.

Once you are on the person's profile, follow these steps:

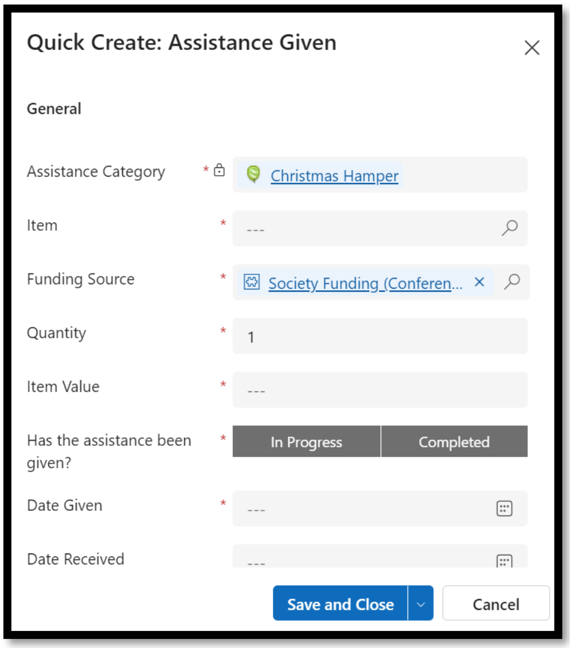
1. select **Christmas Hamper** from the menu at the top of the page



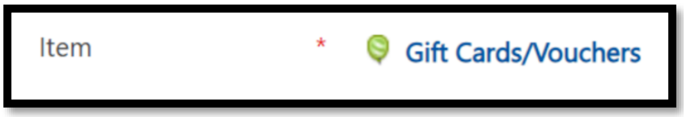
2. Once you click on this, a new assistance window will open. With other types of assistance, you would need to create an interaction before you can enter the assistance details, but Christmas hampers are an exception. You'll notice that the Assistance Category is locked and automatically shows Christmas Hamper as the category, so there is no need to enter anything here.



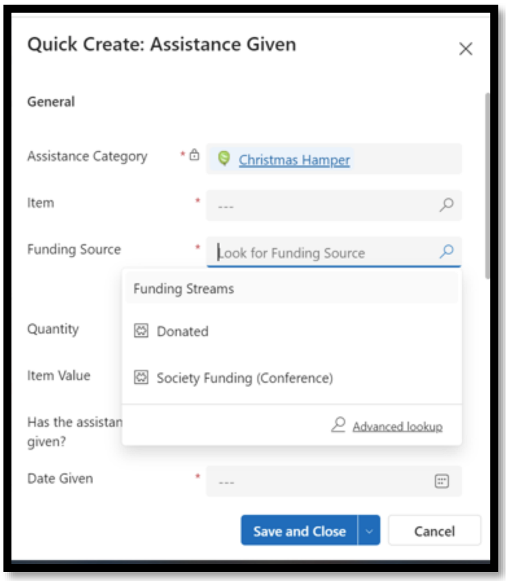
NOTE: Christmas hampers are a collection of items like food, food vouchers, toys and other selected items. They are not an item themselves, so you'll need to select the items that go into the hamper.



3. **Select the item or items**. You'll only be able to choose from food, gift cards, other and toys.



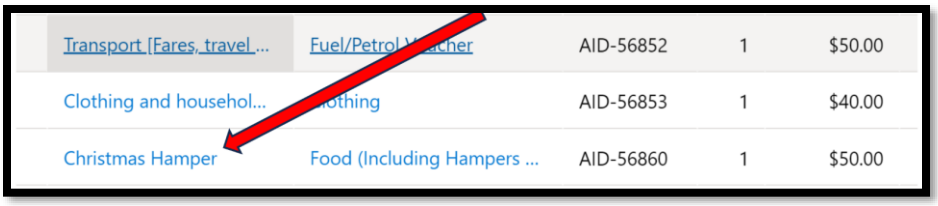
4. The Funding Source either be **Donated** or **Society Funding.** This will depend on whether the items (like toys) have been donated or whether the Conference paid for them out of their budget.



5. Enter the **quantity** and **item value**. This will be the quantity of the item, not the hamper.

6. Click on **Completed**, the **date** the item was given out and click on **Save and Close.**

7. The hamper will appear, along with other assistance items, under Assistance Given.

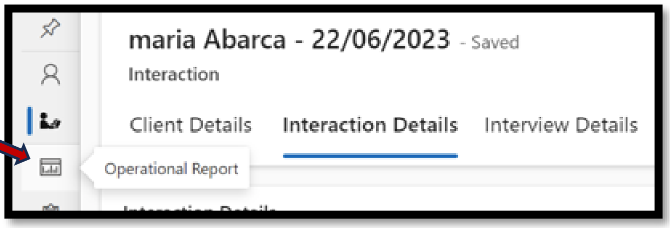


10. Reporting

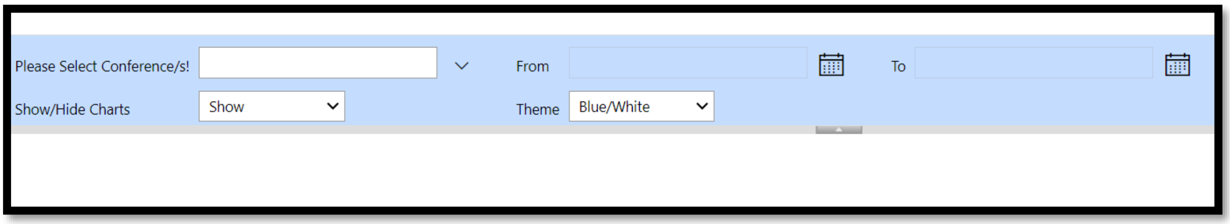
10.1 Creating a basic operational report

CAMS gives Conferences the ability to produce what is called a basic operational report. These reports contain a summary of activity by each Conference and can be created whenever the Conference wants to see a summary, usually monthly. The steps to produce an operational report are as follows:

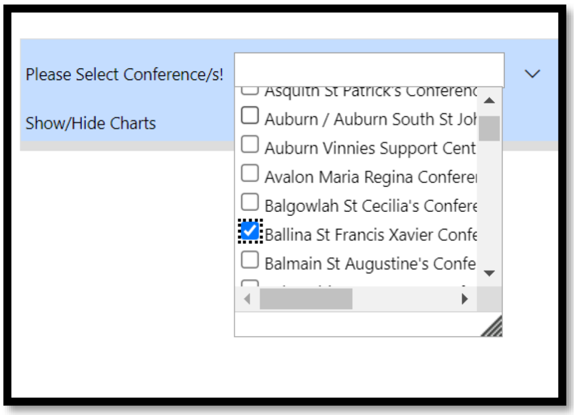
1. Click on the **operational report icon** from the left of the screen



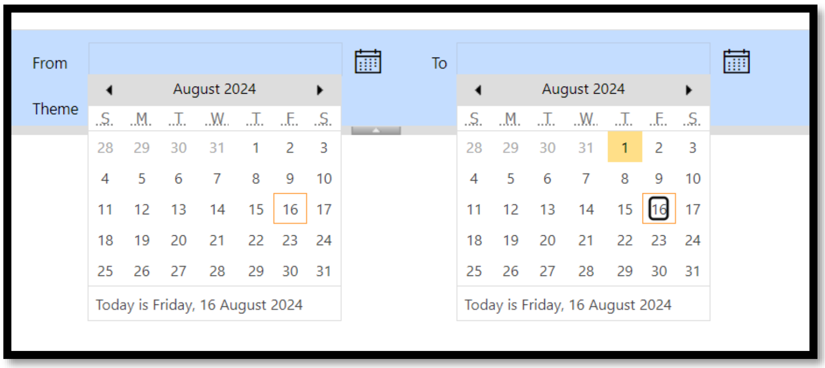
2. A new window will appear



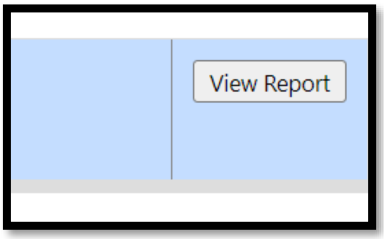
3. Go to the drop-down box to select your Conference.

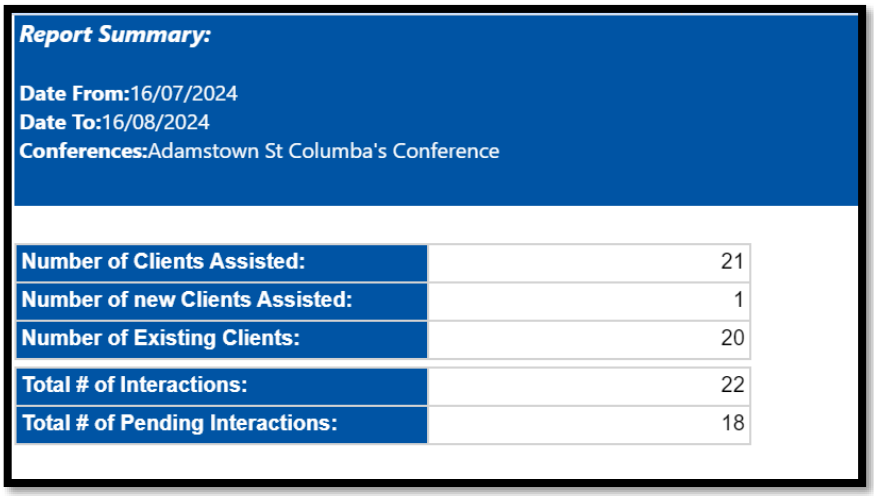


4. Select the date range you want using the calendars



5. Click on **View Report** and a summary of the Conference's activities should appear



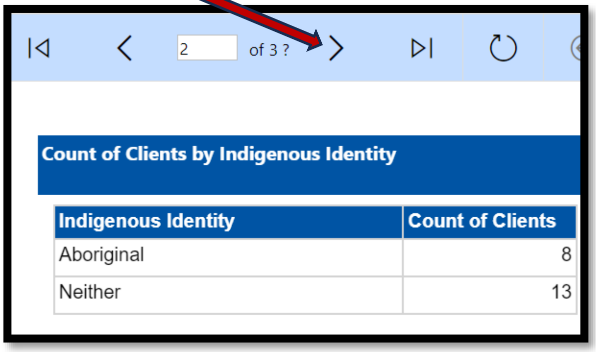


Report Summary:

Date From:16/07/2024
Date To:16/08/2024
Conferences: Adamstown St Columba's Conference

Number of Clients Assisted:	21
Number of new Clients Assisted:	1
Number of Existing Clients:	20
Total # of Interactions:	22
Total # of Pending Interactions:	18

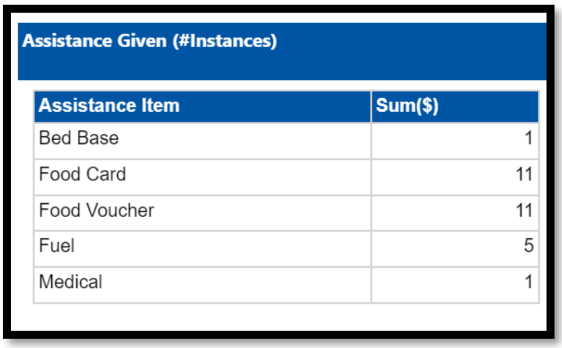
6. If you want to break this information down further, you can do so by clicking on the arrow right. As you arrow right, different data sets will appear. Keeping scrolling through until you find the one you want.



Count of Clients by Indigenous Identity

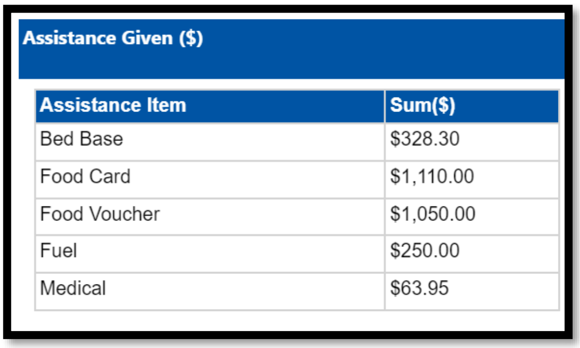
Indigenous Identity	Count of Clients
Aboriginal	8
Neither	13

The data will display according to the order in which it appears, with profile information being the first to appear. So, information about income source, disability etc. will appear first. Page 7 will give you a breakdown of assistance given. Page 8 will give you a breakdown on how much you spent on them.



Assistance Given (#Instances)

Assistance Item	Sum($)
Bed Base	1
Food Card	11
Food Voucher	11
Fuel	5
Medical	1



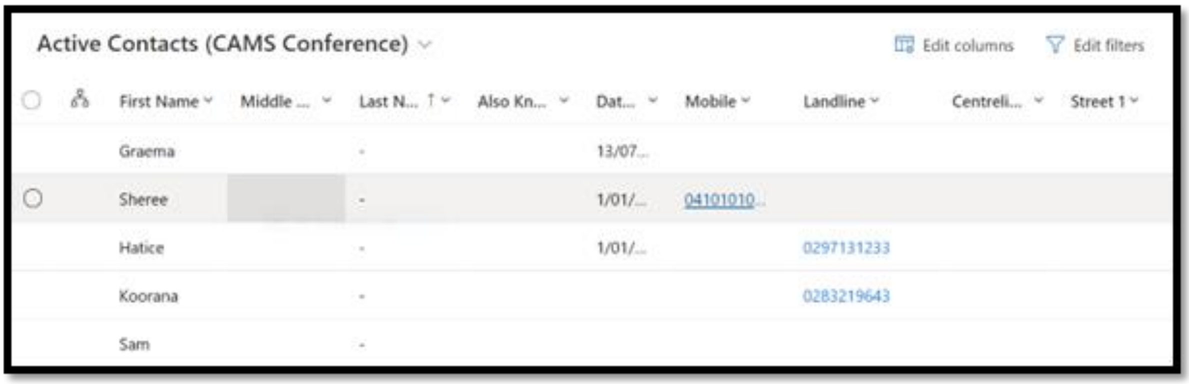
Assistance Given ($)

Assistance Item	Sum($)
Bed Base	$328.30
Food Card	$1,110.00
Food Voucher	$1,050.00
Fuel	$250.00
Medical	$63.95

10.2 Creating reports based on profiles and interactions

10.2.1 Reporting on Client profile Information

Go to the Contacts menu and scroll to My Conference Clients. You'll see a list of all the profiles your team has created.



Active Contacts (CAMS Conference)

Edit columns | Edit filters

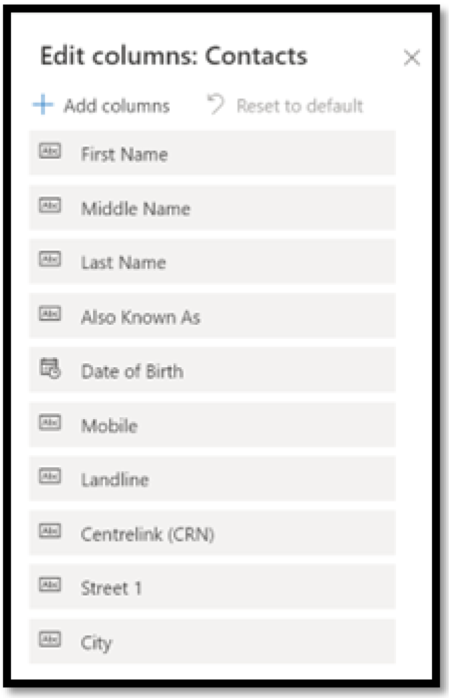
First Name	Middle ...	Last N...	Also Kn...	Dat...	Mobile	Landline	Centreli...	Street 1
Graema		-		13/07...				
Sheree		-		1/01/...	04101010...			
Hatice		-		1/01/...		0297131233		
Koorana		-				0283219643		
Sam		-						

Depending on what information you want to report on, you will have to manipulate the edit columns and the filters to produce a view that you can export into an Excel file.

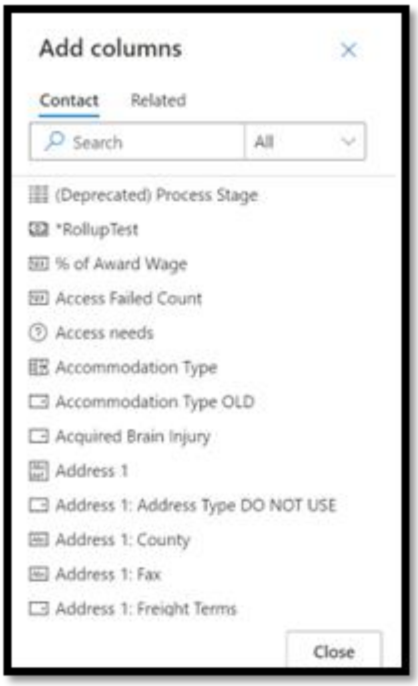
1. Go to the **Conference clients** menu

2. Click on **edit columns.** A box like this will appear

3. Click on **Add Columns**



1. When you click on **Add Columns**, this box will appear:

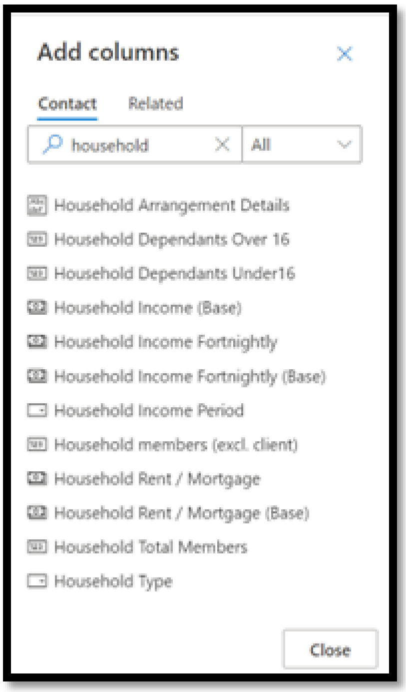


All of the information that appears here is derived from the client profile, so we can produce a report on anything that is demographic, or client profile related. There is a search field where you can type a word, like 'dependents' or you can scroll through the drop-down box to find the item you're looking for.

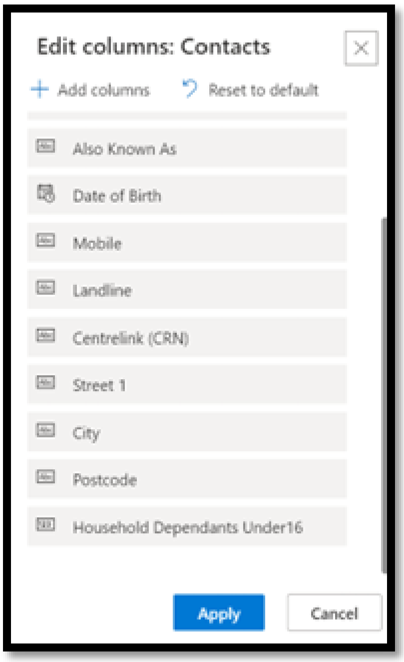
For example, I want to produce a report on all the families we assist with children under 16.

Example 1

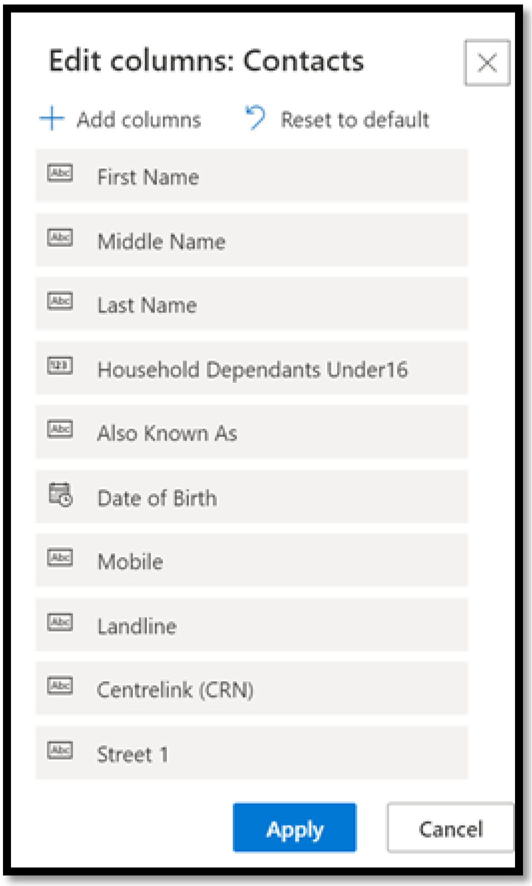
From the Add Columns menu, start typing 'household', and the item 'household dependents under 16 will appear:



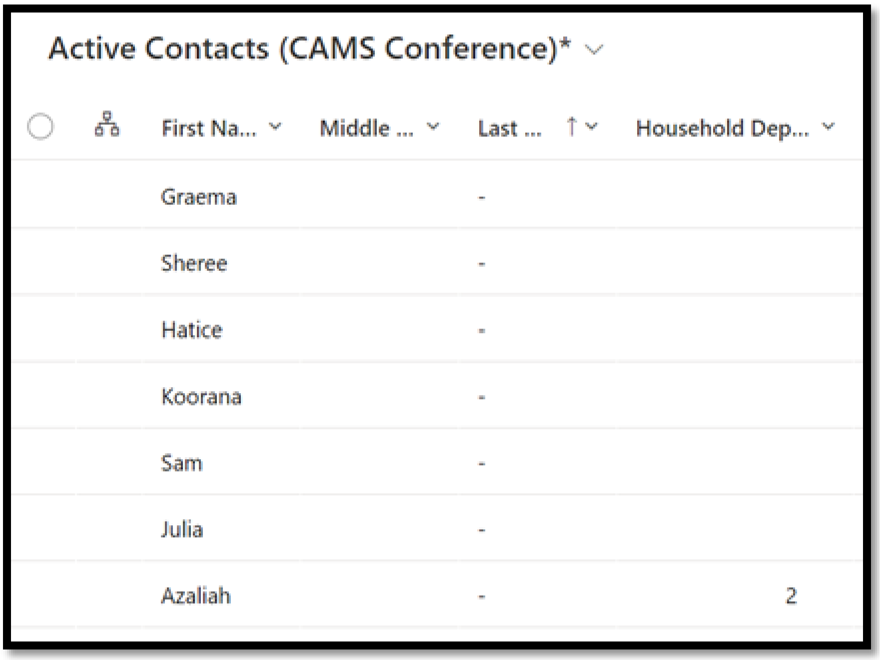
Once you select, close the menu and it will appear at the bottom of the list of items in the Edit Columns box. You'll have to scroll down to find it.



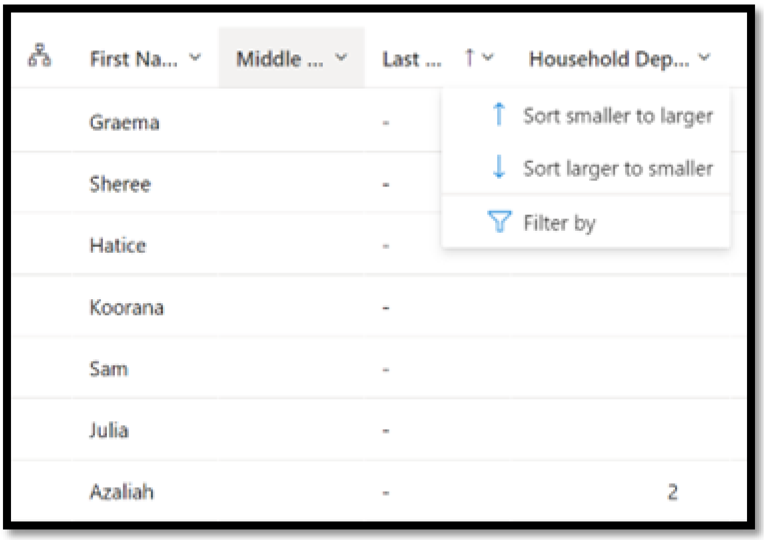
If you leave this item at the bottom of the list, it will appear at the far-right column of your report, and it won't be visible without scrolling right. We can fix this by dragging and dropping it up the list.



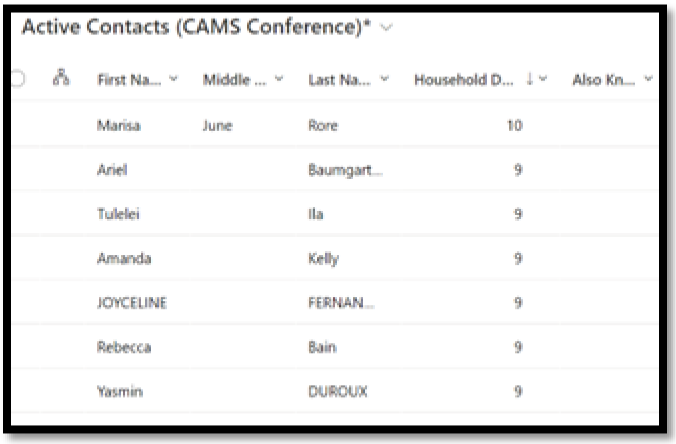
In this example, I've dragged it to fourth position under the names. You can then click on 'Apply'. This will take you back to the Conference Clients list screen.



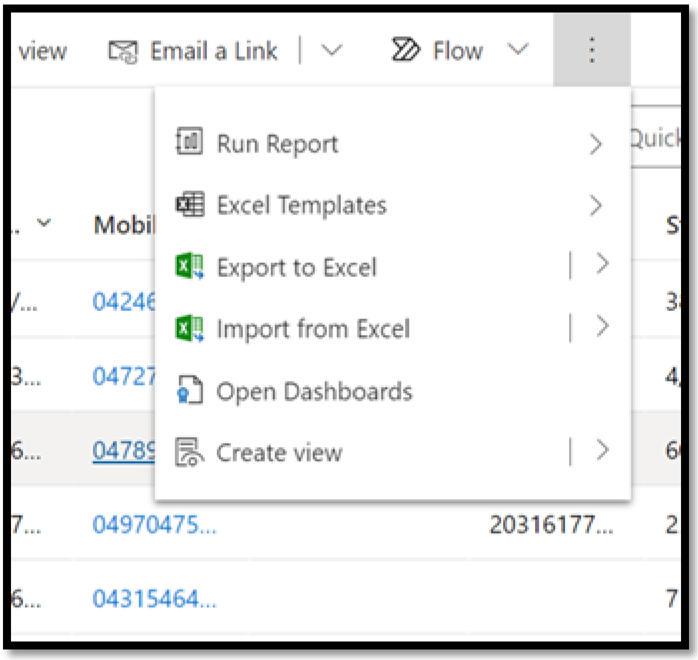
You'll see that Household dependents is now in a visible field showing all profiles that have clicked 'yes' to the question about household dependants under 16, but in no specific order. If you want to order the information, you can use the filter functions. For example, if I want to order from most to least number of dependents, I can click on the downward pointing arrow next to the household details field, and it gives me options to sort.



The report will look like this:



To generate the Excel report, click on the three dots in the top bar, and you'll see an option to export to Excel. Click on this, and the report will be generated.



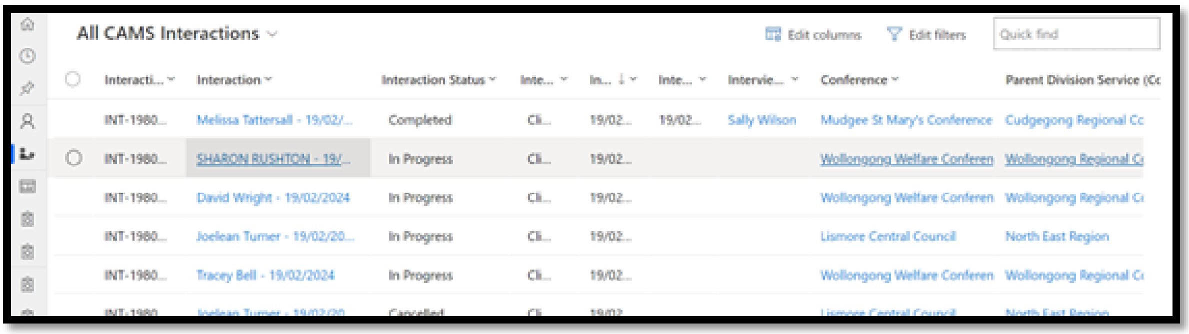
This was an example of generating a report based on household dependents. You can also produce a report based on income, accommodation type or CALD details in the same way. You can also select multiple items in the same report.

10.2.2 Reporting on interactions-related information

In the first example, we prepared a report on information that was pulled from the person's profile. We can also generate a report on the data from the sections related to the interaction, including circumstances.

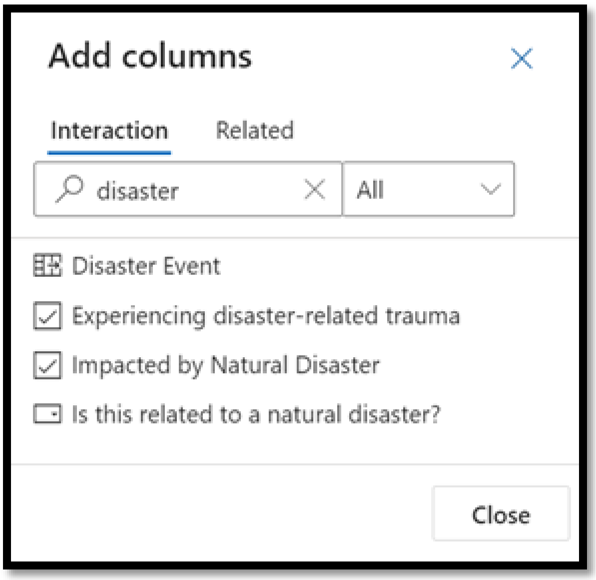
To start off, we will generate a report on the number of people some kind of disaster-related circumstance, e.g. flood.

To do this we will be working from the Interactions menu, rather than the Conference menu. You will need to go to 'My Teams Active interactions'.

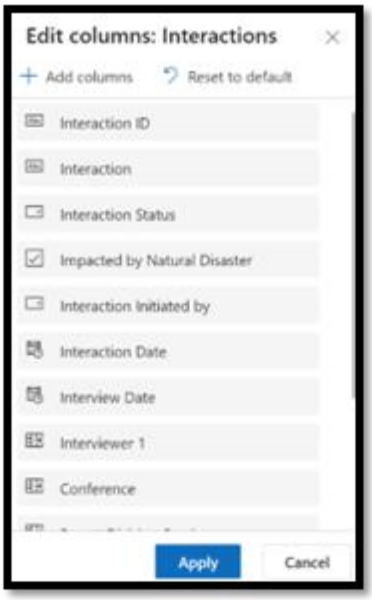


As in the first example, we are going to use the 'edit columns' feature, and then we will use the 'Add columns' feature.

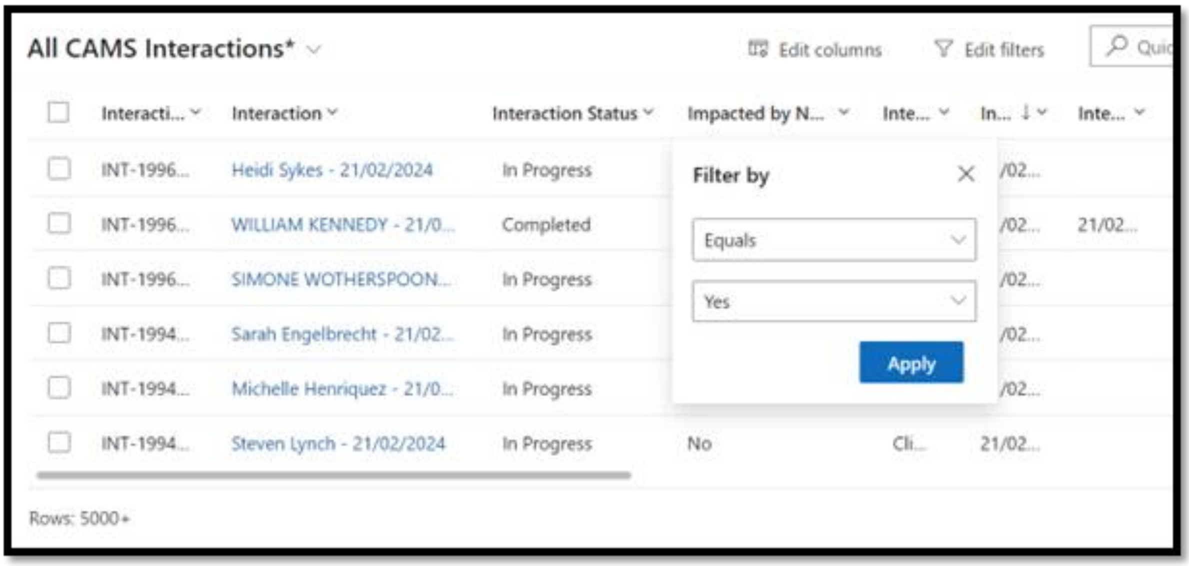
We want to know how many people are experiencing disaster-related events. To do this, we will enter 'disaster' into the search field.



If we want to restrict it to just those who have been impacted, just select that and close.
As in the first example, you need to move the columns up the list, so they appear visible on our Interactions menu screen.



Now that the information appears on the Interactions menu, we can filter and sort the information. In this case the filter we want to use is 'equals yes'. Click on 'apply'.



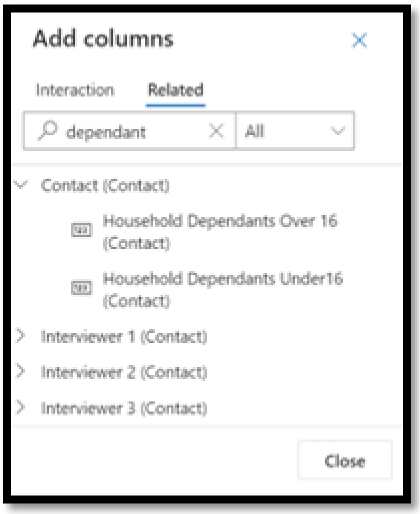
As you did in the first example, you can export this into Excel and delete columns you don't need or refine the report however you want.

10.2.2 Reporting on profile and circumstances data in the same report

In these examples, we only worked with one data set, i.e. disaster or children under 16, one from the profile and one from the circumstances. It is possible to generate a report with more than one data set. For example, our safeguarding team generate a report containing families with children under 16 AND circumstances like domestic violence, homelessness, drug and alcohol to help them flag when a safeguarding report is needed.

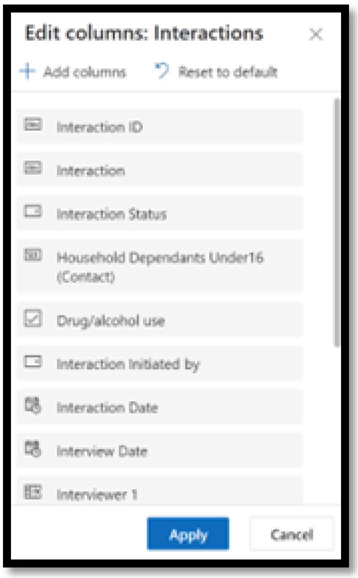
In the above examples, we used Conference Client data to retrieve the demographic information and the Interactions menu to retrieve the circumstances information. It is possible to retrieve both from the Interactions menu if we want to generate a report with both data sets on the same report.
In this example, go to the interactions menu – edit columns – related.

You then click on the downward arrow next to ‘Contact’. The dropdown list under contact will give you too many options to scroll through. It is best to enter a keyword in the search field. This keyword should be an exact match to what is in the CAMS fields, for example ‘dependent’.



To include the circumstance information, select your column in the same way you selected it in the previous example, and you can arrange your column as you want. In this example, we have placed ‘drug and alcohol use’ under ‘dependents under 16’.

Filter as wish using the different filter types and you have a report more specific information.



Reporting on Assistance Given

The above methods won't work if you are trying to generate a report on specific types of assistance given. However, this is available on Power BI, and trainer champions in your region can generate this. If a trainer champion doesn't have access to Power BI, they can reach out to Ridwana Orchi and request it.