

CAMS User Guide: Vinnies Assist

There are two CAMS Systems

CAMS LIVE System: For data entry of real clients. It is identified by a blue bar with the Vinnies logo.

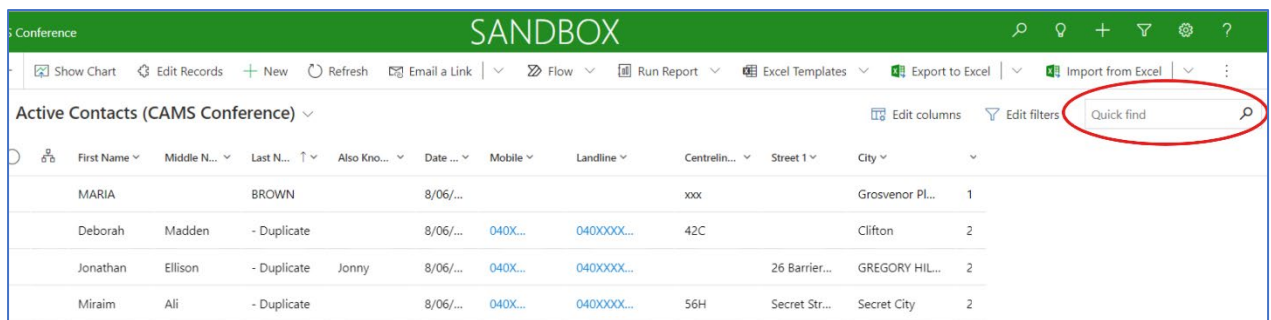
Link: <https://svdp-prd-crm-02.crm6.dynamics.com/main.aspx?appid=2ff23c3e-0f47-4500-8119-10f62bbf8647&pagetype=entitylist&etn=contact&viewid=f79ef9fd-5172-eb11-a812-000d3acbab44&viewType=1039>

CAMS Practise System: For data entry of fake or dummy clients. It is identified by a green bar with “Sandbox” written on it. This where you can practice using CAMS.

Link: <https://svdp-trn-crm-02.crm6.dynamics.com/main.aspx?appid=ee6388bf-ff60-40a2-9c68-8aa975e69e3a&pagetype=entitylist&etn=contact&viewid=f79ef9fd-5172-eb11-a812-000d3acbab44&viewType=1039>

1. Searching for a Client

1. Once you log in to CAMS, this is the view of the home page.
2. Click into the “Quick Find” box circled below and enter the client you wish to search.
Searching with Date of Birth gives you the most accurate results.



The screenshot shows the CAMS Sandbox interface. At the top, there is a green header with the word 'SANDBOX'. Below the header is a navigation bar with various icons and options like 'Show Chart', 'Edit Records', 'New', 'Refresh', 'Email a Link', 'Flow', 'Run Report', 'Excel Templates', 'Export to Excel', and 'Import from Excel'. The main content area is titled 'Active Contacts (CAMS Conference)' and contains a table of contact records. A search box labeled 'Quick find' is circled in red in the top right corner of the table area.

First Name	Middle N...	Last N...	Also Kno...	Date ...	Mobile	Landline	Centrelin...	Street 1	City	
MARIA		BROWN		8/06/...			xxx		Grosvenor PL...	1
Deborah	Madden	- Duplicate		8/06/...	040X...	040XXXX...	42C		Clifton	2
Jonathan	Ellison	- Duplicate	Jonny	8/06/...	040X...	040XXXX...		26 Barrier...	GREGORY HIL...	2
Miraim	Ali	- Duplicate		8/06/...	040X...	040XXXX...	56H	Secret Str...	Secret City	2

3. CAMS will show the most relevant search results based on your search query. For example, if the user types in “John Smith,” the results will look like this:

Search Results ∨



john smith ×

<input type="radio"/>	First Name ↑ ∨	Middle N... ∨	Last Name ↑ ∨	Date of Birth ∨	Relationship T... ∨	Identifies ... ∨	Mobile ∨
	John		Smith	27/02/1990	Person We...		0412365...
	John		Smith		Contact		
	John		smith	27/12/2017	Person We...	Male	
	John		Smith	6/12/1980	Person We...	Male	0422 334...

4. Double click on the client whose file you want to open, and you will see their details.

Camilla Cabello - Saved
Contact · CAMS Conference

Completed
Client Status

Basic Details | Notes & Alerts | Interaction History | Related

Personal Details

First Name * Camilla

Middle Name ---

Last Name * Cabello

Also Known As ---

Gender * Female

Client Status

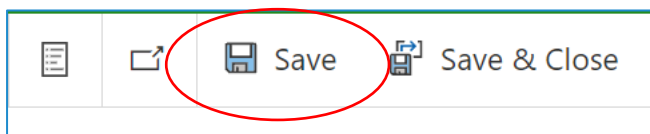
Client Status In Progress Completed

Privacy Details

All personal information contained in my application will be collected and used as set out in the [privacy collection statement](#).

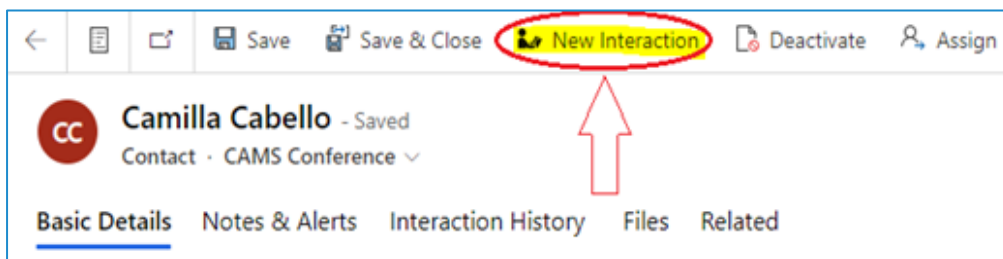
2. Update a Client Record

You may want to update a client record with an **email address** or a new mobile number for example; delete existing details in the relevant field, enter the new information and then click the “SAVE.”



3. Create a New Interaction – Enter the assistance given

Click New Interaction – Once you have opened a Client Record, Click on the ‘New Interaction’.



Complete the Interaction in the following order:

New Interaction - Unsaved

Camilla Cabello Contact | Wagga Wagga St Clare's Care & Support Conference Conference | Sharon Settecasse Owner | --- Interaction ID

Client Details | **Interaction Details** | Interview Details | Notes and Circumstances | Assistance and Referrals | Files

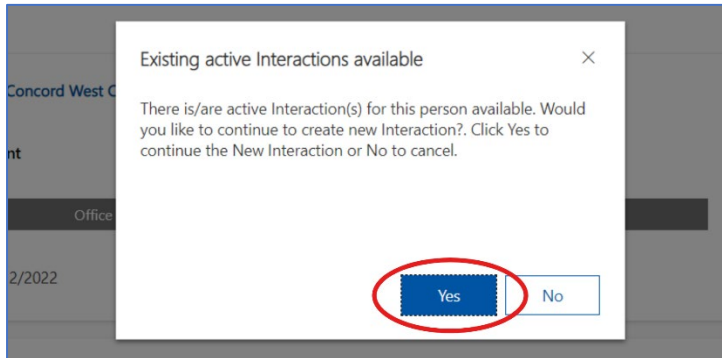
Interaction Details

1 → 2 → 3 → 4

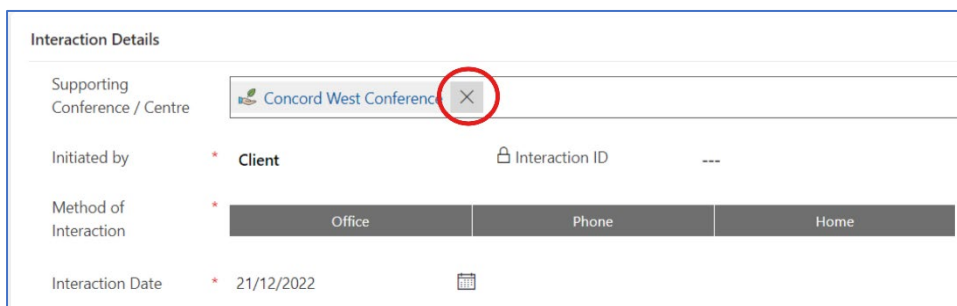
Supporting Conference / Centre | Wagga Wagga St Clare's Care & Support Conference

1. INTERACTION DETAILS TAB

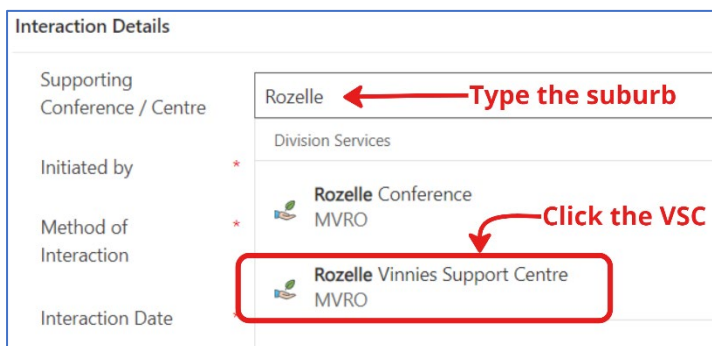
You may encounter the following Pop-up Window when you open this page. If you do, press “Yes”



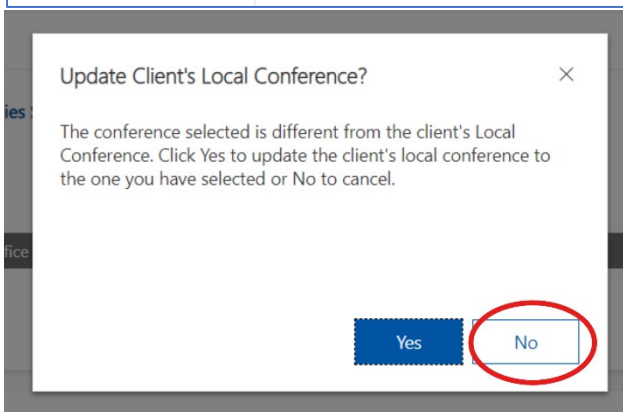
Step 1: Change the pre-filled Supporting Conference/Centre to the VSC the Conference is linked to. For example, this client is linked to the Concord West Conference. Press the “X” to remove this conference and type into the field “Rozelle” to change the supporting Conference to Rozelle VSC. This is so you can add your name as an Interviewer.



A screenshot of the "Interaction Details" form. The "Supporting Conference / Centre" field contains "Concord West Conference" and has a red circle around the "X" icon to its right. Other fields include "Initiated by" (Client), "Method of Interaction" (Office, Phone, Home), and "Interaction Date" (21/12/2022).



A screenshot of the "Interaction Details" form. The "Supporting Conference / Centre" field contains "Rozelle" with a red arrow pointing to it and the text "Type the suburb". Below it, a dropdown menu is open, showing "Rozelle Conference MVRO" and "Rozelle Vinnies Support Centre MVRO". A red arrow points to the second option with the text "Click the VSC". The "Rozelle Vinnies Support Centre MVRO" option is highlighted with a red box.








Step 2: What was the method of Interaction? Select Phone

Method of Interaction *	Office	Phone	Home
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Click on the Interview Details TAB.

2. INTERVIEW DETAILS TAB

Follow the steps below. Your name is listed for each Sydney Metro VSC so please select your name in the Interviewer 1 Field.

Interview Details	
Actual Interview Location	Phone Click to Select Phone 
Supporting Conference / Centre	 Rozelle Vinnies Support Centre Click to Select Date 
Interview Date	21/12/2022
Interviewer 1	Look for Interviewer 1 Click to Select Your Name 
Interviewer 2	---
Interviewer 3	---
Total Visit Duration	15 minutes Click to Select Duration 

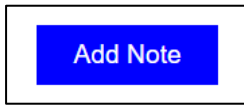
3. NOTES AND CIRCUMSTANCES TAB

Step 1: Tick the “Financial Difficulties – cannot afford food” checkbox (you can choose more than one) and click the ‘Save’ button on the top left corner.

Client Details	Interaction Details	Interview Details	<u>Notes and Circumstances</u>	Assistance and Referrals	Files	Related
Client Circumstances						
You can select more than one circumstance						
Access to facilities (including computer, phone, shower, laundry)	<input type="checkbox"/>	Financial difficulties – cannot afford bills for essential services ...	<input type="checkbox"/>	Grief and loss	<input type="checkbox"/>	
Discrimination, including racial and sexual discrimination	<input type="checkbox"/>	Financial difficulties – cannot afford essential household ...	<input checked="" type="checkbox"/>	Help with transport	<input type="checkbox"/>	
Disengagement with school or other education and training	<input type="checkbox"/>	Financial difficulties – cannot afford food	<input checked="" type="checkbox"/>	Housing crisis (e.g. eviction) or inappropriate dwelling conditions	<input type="checkbox"/>	
Domestic and family violence, or abuse	<input type="checkbox"/>	Financial difficulties – debt	<input type="checkbox"/>	Mental health issues	<input type="checkbox"/>	
Employment difficulties or unemployment	<input type="checkbox"/>	Financial difficulties – housing affordability stress	<input type="checkbox"/>	Physical health/Medical issues	<input checked="" type="checkbox"/>	
		Financial difficulties – other	<input type="checkbox"/>	Problematic drug, alcohol use or gambling	<input type="checkbox"/>	

Step 2: If you want to leave any notes for the VSC, you can add a Note. This is not mandatory.

Scroll Down the page and Click 'Add Note', fill in any notes and click "Save and Close" at the bottom of the form.



Quick Create: CAMS Note ×

Subject * Phone Notes

Note Date 21/12/2022 📅

Notes
Need to follow up in the new year, requires rent assistance and a home visit.

ASSISTANCE AND REFERRALS

- a. You will enter the Food Voucher details here. Click on the "Add Assistance Given" button. This will open a new pop up window.

Assistance Given

Will you be giving at least one assistance/referral item?

Yes No

[Add Assistance Given](#)

Quick Create: Assistance Given

General

Assistance Category *

Item *

Assistance Status *

Funding Source *

Quantity * *Do not change this from "1" as more than one voucher is given*

Item Value *Total of all vouchers added up.*

Date Given ---

Date Received ---

Provided By ---

Voucher Id ---

Notes ---

7. Finish the Interaction

Change the "Interaction Status" to "Completed." This is an important step to mark the interaction as done and closed. Else, the interaction status will remain open.

Interaction Status

Interaction Status *

- a. Click the SAVE and CLOSE button to finish an Interaction.