



St Vincent de Paul Society
good works

A NEW SYSTEM TO

HELP US HELP PEOPLE

CAMS USER GUIDE

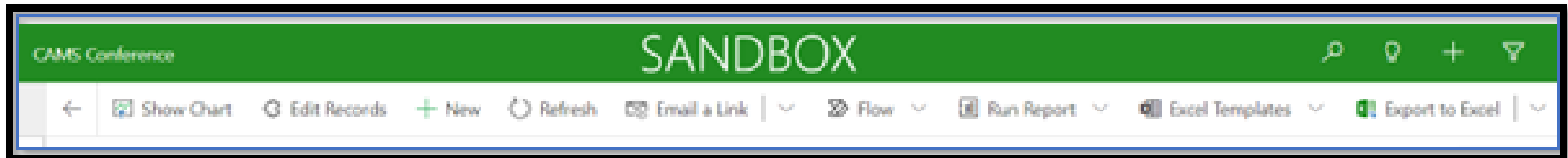
VINNIES REBUILDS RESTORES RENEWS

Introduction

This document is designed to be used as a simple step-by-step guide on how to use the Conference Assistance Management System (CAMS). The four main features covered in this guide are:

1. Searching for a client
2. Creating a new client record
3. Creating a new interaction, and
4. ..

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:

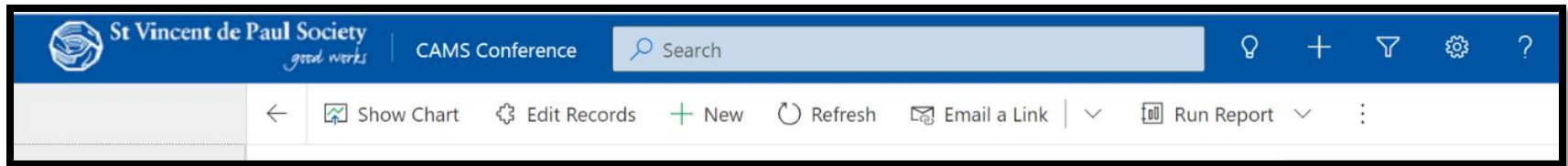


When we are using the training environment, we are not looking up real people or creating real records. It is simply there to help us learn how to use the system.

Introduction



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 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=entityrecord&etn=svdp_camsinteraction&id=d87f9b51-0fc9-ed11-b596-000d3ad1400f

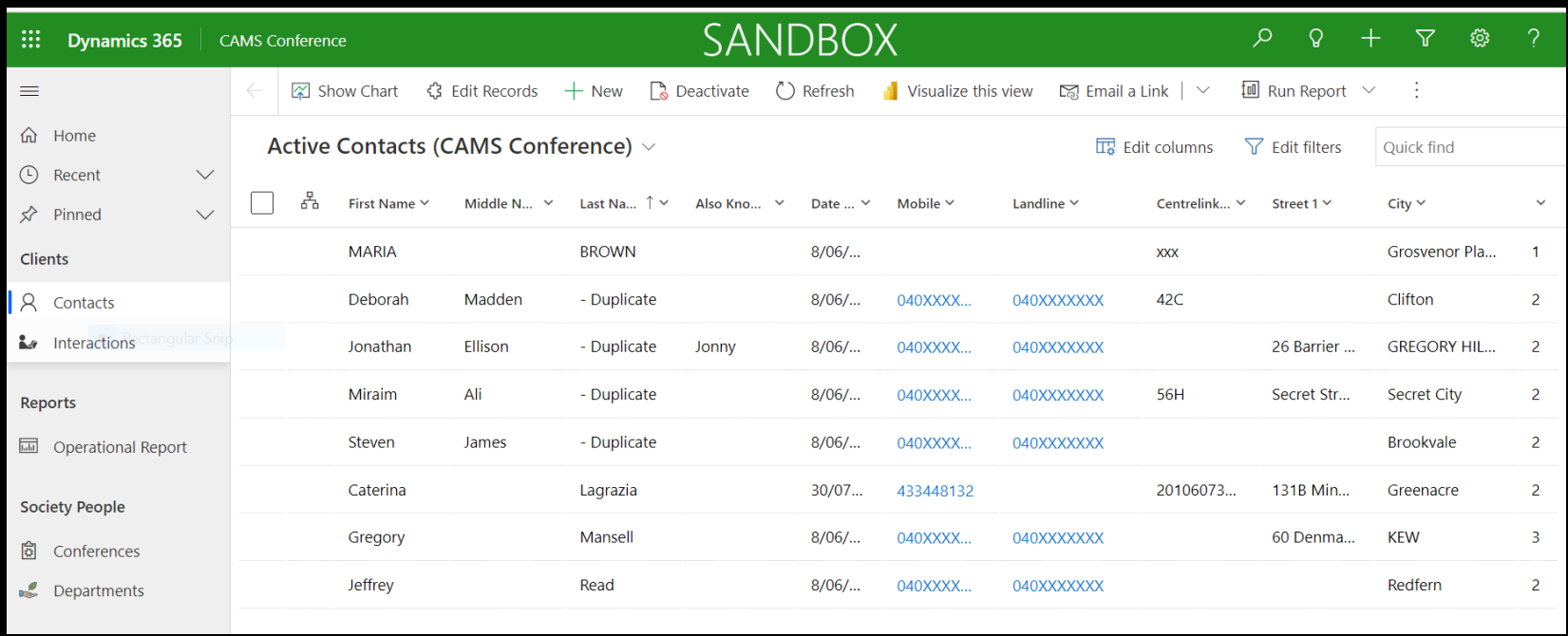
You can access the live system by clicking on this link here:

<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>

VINNIES REBUILDS RESTORES RENEWS

1. Searching for a client

Once you log into CAMS, you'll see a page that looks like this. This is called the home page because it is the page you'll always start from when you want to look someone up to see if they're in the system or enter a new person into the system.



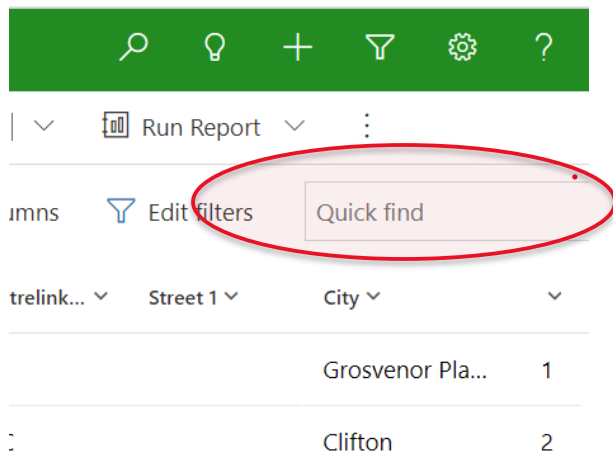
The screenshot shows the Dynamics 365 CAMS Conference interface. The top navigation bar includes 'Dynamics 365', 'CAMS Conference', and 'SANDBOX'. Below the navigation bar, there are several action buttons: 'Show Chart', 'Edit Records', '+ New', 'Deactivate', 'Refresh', 'Visualize this view', 'Email a Link', and 'Run Report'. The main content area displays a table of 'Active Contacts (CAMS Conference)'. The table has columns for 'First Name', 'Middle N...', 'Last Na...', 'Also Kno...', 'Date ...', 'Mobile', 'Landline', 'Centrelink...', 'Street 1', and 'City'. The table contains several rows of contact information, including names like MARIA BROWN, Deborah Madden, Jonathan Ellison, Miraim Ali, Steven James, Caterina Lagrazia, Gregory Mansell, and Jeffrey Read.

	First Name	Middle N...	Last Na...	Also Kno...	Date ...	Mobile	Landline	Centrelink...	Street 1	City	
	MARIA		BROWN		8/06/...			xxx		Grosvenor Pla...	1
	Deborah	Madden	- Duplicate		8/06/...	040XXXX...	040XXXXXXX	42C		Clifton	2
	Jonathan	Ellison	- Duplicate	Jonny	8/06/...	040XXXX...	040XXXXXXX		26 Barrier ...	GREGORY HIL...	2
	Miraim	Ali	- Duplicate		8/06/...	040XXXX...	040XXXXXXX	56H	Secret Str...	Secret City	2
	Steven	James	- Duplicate		8/06/...	040XXXX...	040XXXXXXX			Brookvale	2
	Caterina		Lagrazia		30/07/...	433448132		20106073...	131B Min...	Greenacre	2
	Gregory		Mansell		8/06/...	040XXXX...	040XXXXXXX		60 Denma...	KEW	3
	Jeffrey		Read		8/06/...	040XXXX...	040XXXXXXX			Redfern	2

The first step you do when dealing with a new client is check to see if they are in the system already. You can do this by following these instructions:

1. Searching for a client

In the top right-hand corner of the home page. You'll see a box that says 'Quick find'. You can use this search for clients to see whether or not they are already in the system. You can enter their:



- City, street name or postcode
- Conference Client Code
- Date of birth
- Email
- First, last, middle or full name
- Landline or mobile no.
- Reference no.

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

<input type="checkbox"/>		First Name ↑	Middle N... ↓	Last Name ↑	Date of Birth ↓	Relationship T... ↓	Gender ↓	Mobile ↓
		John		Smith	27/02/1990	Person We ...		04123654...
		John		Smith	6/05/1977	Contact	Man or...	04125896...

1. Searching for a client

Take your mouse over the name of the client and double click on the client whose file you wish to see. Hovering the pointer anywhere on the row will make it turn grey. Clicking on the row will make a blue tick appear.

John	Smith	8/06/1803	Person We ...	Man or...	040X...
<input checked="" type="checkbox"/>	john	Smith	19/08/1966	Person We ...	Not st... 0415...
John	Smith	20/10/1982	Person We ...	Man or...	0411 ...

JS John Smith - Saved
Contact · CAMS Conference ▾

Basic Details | Notes & Alerts | Interaction History | Related ▾

Also Known As ---

Gender * Male

Date of Birth * 6/05/1977

Centrelink (CRN) ---

Language at Home Hindi

Country of Birth India

Residential (Visa) Status Australian Citizen

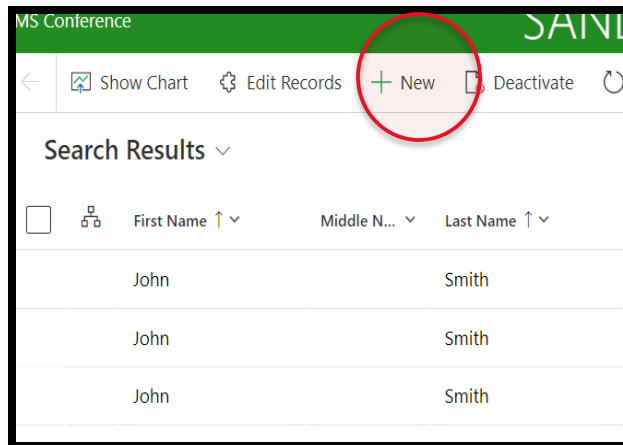
If you think this is the person you want, you can click the mouse twice on that row and it will open up a new page with that person's details. You'll be able to tell from the basic details that this is the person you're looking for. If there is no client matching the details you've typed in, you will see a message that reads:

No data available

If you see this, you can create a new client.

2. Creating a new client

Once you see a client is not yet in the system, you can go ahead and create that client. The information you need to enter is very similar to the information that you find on an A/B form, as the sections of the form have been designed to match the fields in CAMS. Just follow these steps.

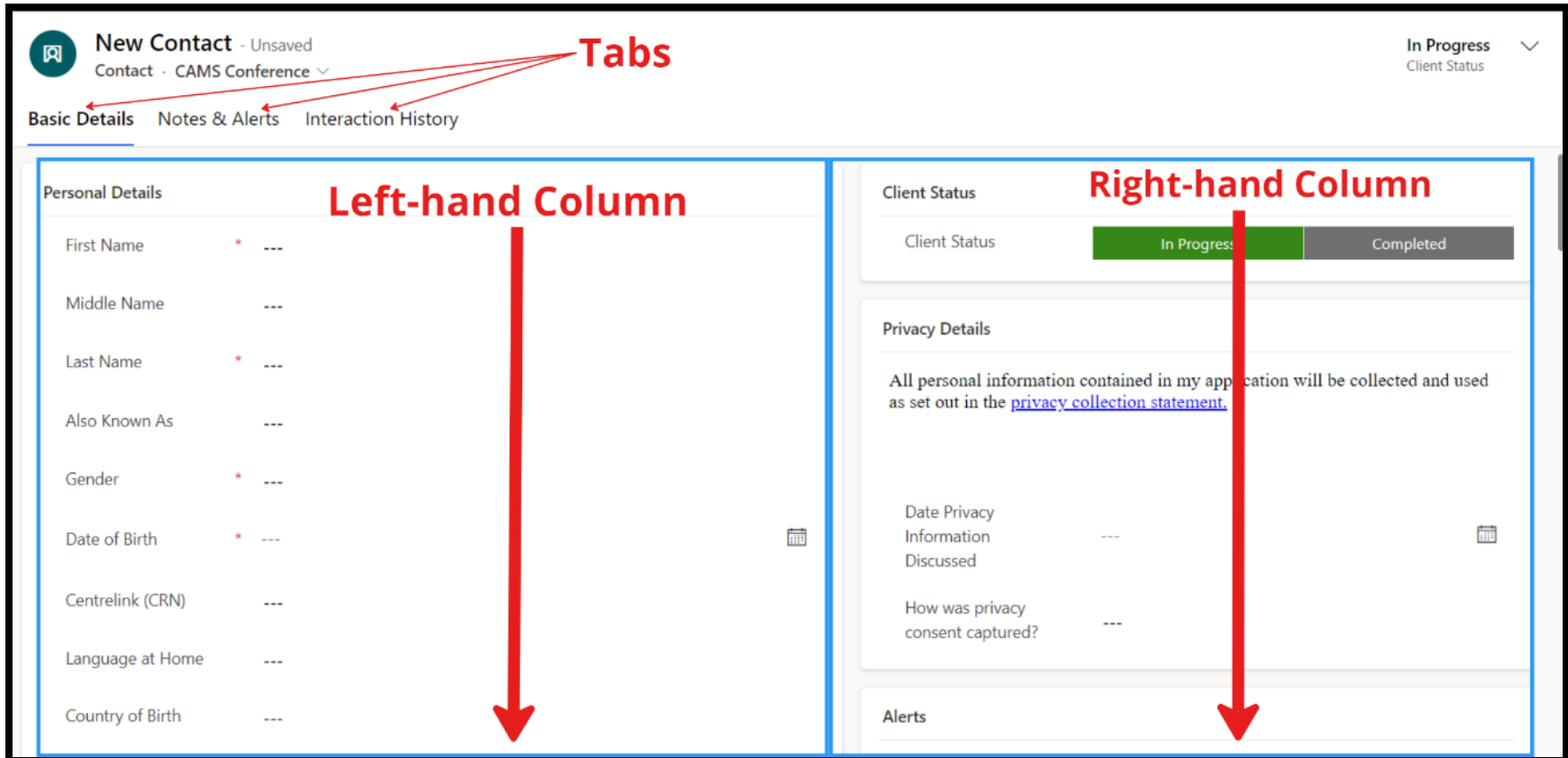


Step 1

Click **'+ New'** in the top section of your screen. This will open up 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. Creating a new client – basic profile

If you click on any of these Tabs that have the red arrow pointing to them, these fields will open up.



Basic Details | Notes & Alerts | Interaction History

Personal Details

First Name * ---

Middle Name ---

Last Name * ---

Also Known As ---

Gender * ---

Date of Birth * ---

Centrelink (CRN) ---

Language at Home ---

Country of Birth ---

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](#).

Date Privacy Information Discussed ---

How was privacy consent captured? ---

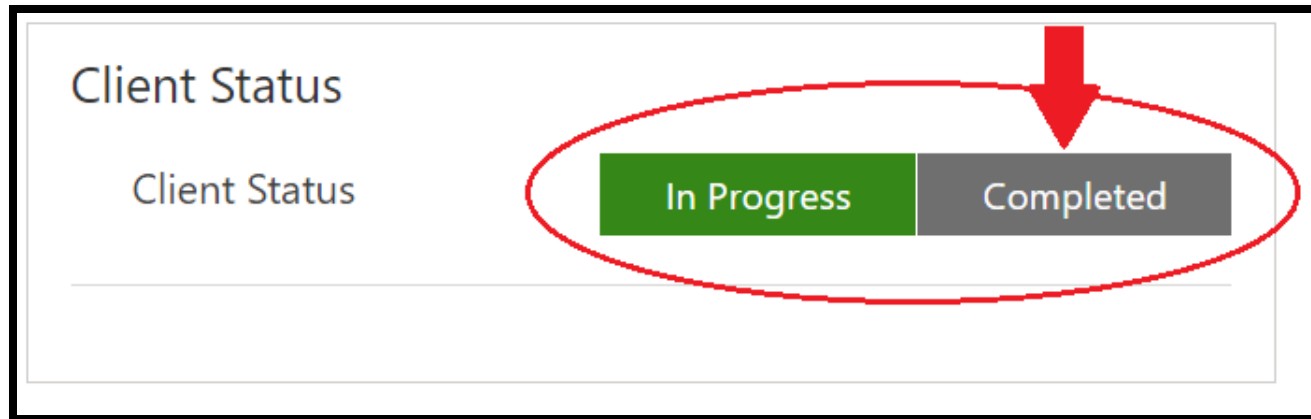
Alerts

VINNIES REBUILDS RESTORES RENEWS

2. Creating a new client – filling in mandatory details

We're going to start with the Basic Details Tab. This will create a basic profile. You only need to enter the basic details of a person to create a basic profile. There is a quick way to know which details you need to enter. You just need to go to the top right-hand corner and click on the tab that says 'Completed'. The fields you need to complete will appear in red.

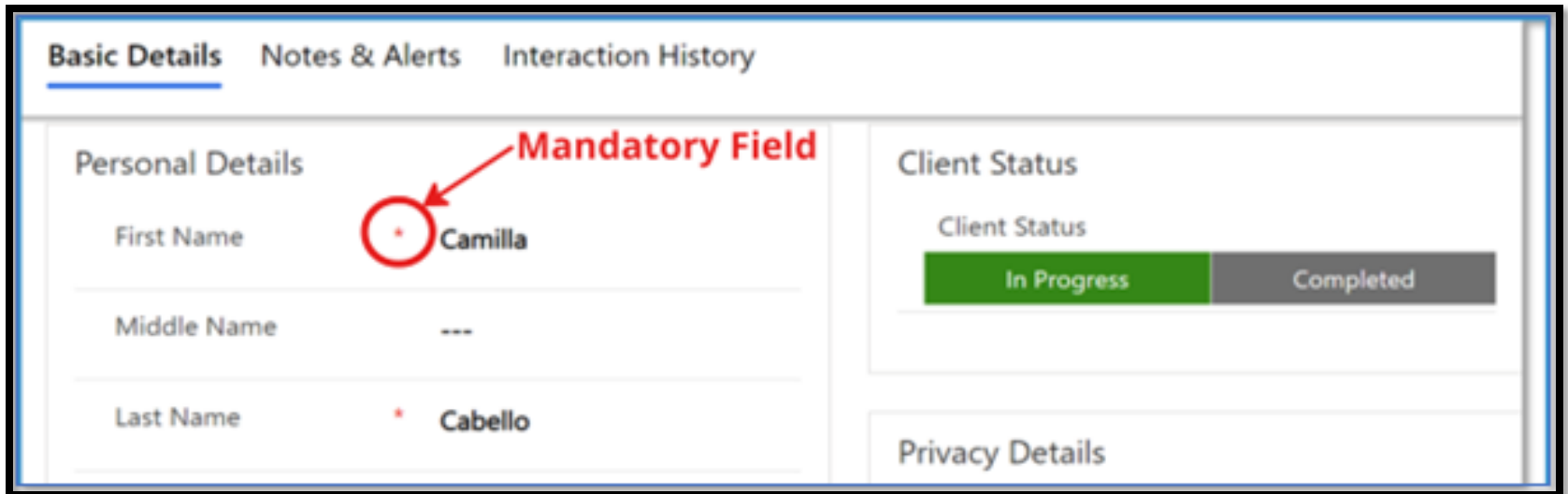
Step 2: Click on '**Completed**' tab.



NB: The 'Completed' tab is normally used when we are sure we have completed the client's details. The 'Completed' must be clicked before you move on to record interaction details. If you don't have all the details you need to complete a profile, you would click on '**In Progress**'.

2. Creating a new client – Filling in the mandatory fields

Step 3: 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. You will see all Mandatory fields only if the Client Status is set to 'Completed'.



The screenshot shows a client profile form with three tabs: 'Basic Details', 'Notes & Alerts', and 'Interaction History'. The 'Basic Details' tab is active. It is divided into two columns. The left column, 'Personal Details', contains three input fields: 'First Name' with the value 'Camilla', 'Middle Name' with '---', and 'Last Name' with 'Cabello'. Red asterisks (*) are placed to the left of the 'First Name' and 'Last Name' fields. A red circle highlights the asterisk for 'First Name', with a red arrow pointing to it from the text 'Mandatory Field'. The right column, 'Client Status', has a title 'Client Status' and a label 'Client Status' above two buttons: 'In Progress' (highlighted in green) and 'Completed' (grey). Below this is a section for 'Privacy Details'.

NB: The 'Completed' tab is normally used when we are sure we have completed the client's details. The 'Completed' must be clicked before you move on to record interaction details. If you don't have all the details you need to complete a profile, you would click on 'In Progress'.

2. Creating a new client – fields with multiple options



Language at Home * Engl

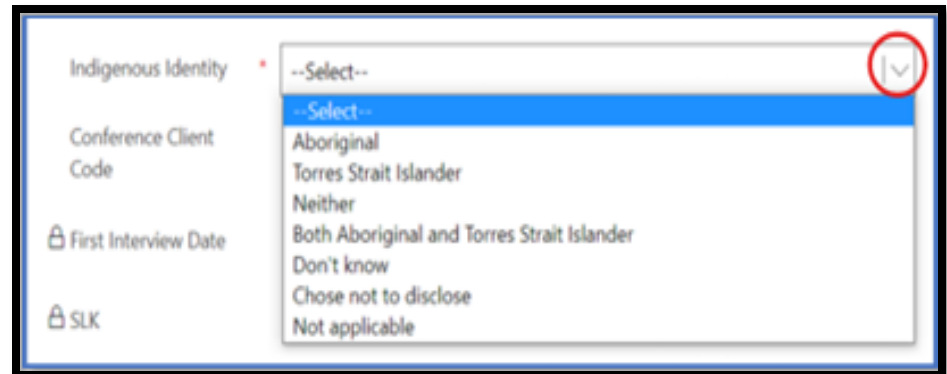
Country of Birth * Languages Recent records

Residential (Visa) * English **Select by clicking**

Status Advanced lookup

As you enter client details into system, you sometimes come across fields with multiple options and you have to 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.

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.



Indigenous Identity * --Select--

Conference Client Code

First Interview Date

SLK

Aboriginal

Torres Strait Islander

Neither

Both Aboriginal and Torres Strait Islander

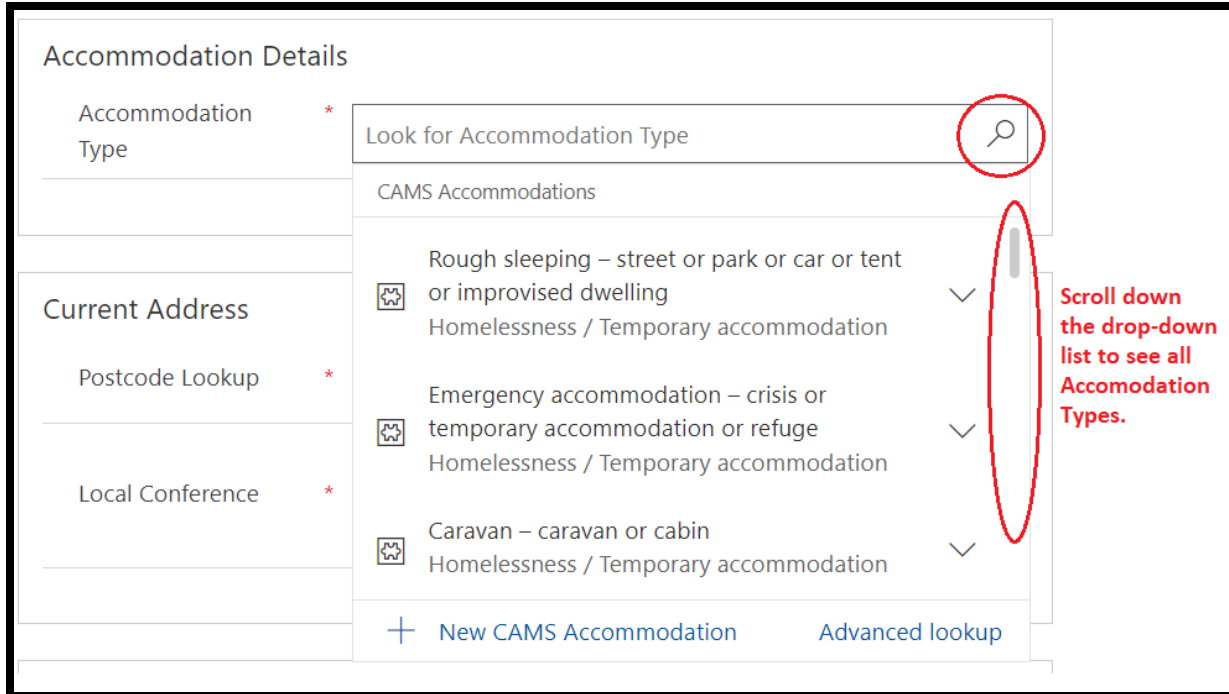
Don't know

Chose not to disclose

Not applicable

2. Creating a new client – accommodation types

Accommodation type also requires use of a drop-down menu.





The screenshot shows a form titled "Accommodation Details" with several fields: "Accommodation Type", "Current Address", "Postcode Lookup", and "Local Conference". The "Accommodation Type" field is active, showing a search box with the text "Look for Accommodation Type" and a magnifying glass icon. Below the search box is a scrollable list of accommodation types under the heading "CAMS Accommodations". The list includes three items, each with a house icon, a description, and a dropdown arrow: "Rough sleeping – street or park or car or tent or improvised dwelling", "Emergency accommodation – crisis or temporary accommodation or refuge", and "Caravan – caravan or cabin". A red circle highlights the magnifying glass icon, and a red oval highlights the scroll bar. A red text annotation to the right of the scroll bar reads: "Scroll down the drop-down list to see all Accomodation Types." At the bottom of the list, there are two buttons: "+ New CAMS Accommodation" and "Advanced lookup".


2. Creating a new client – entering address



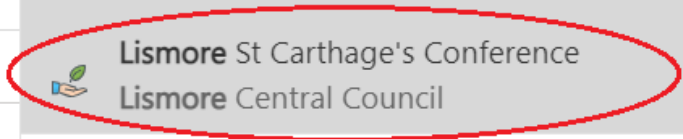
To enter a person's current address, you should start with the postcode. If the person is sleeping rough or in transitional housing, this is all that is required. Full addresses are mandatory for private rentals or non-temporary housing. The local Conference is also a mandatory field.

Current Address

Postcode Lookup *  2480 - East Lismore  Enter the client's postcode

Local Conference * Lismore  Type the name of your Conference starting with suburb

Division Services

 Lismore St Carthage's Conference
Lismore Central Council

Household Details + New Division Service Advanced lookup

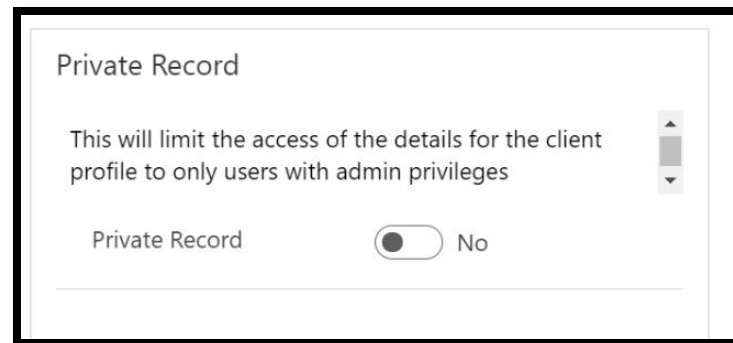
2. Creating a new client – creating alerts

Before you can complete a basic profile, there are two more things to look at. The first is whether there are any alerts, and also if this needs to be a private profile.



An alert is a communication tool for members. They appear on the right side of the screen. They are to 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.

Some records need to be kept private, even from other members. These are records about people with special circumstances who, for some reason, may need to keep their identity private.



2. Creating a new client – declaration and privacy



St Vincent de Paul Society
good works

The final things you need to do is complete the privacy statement field by entering a date on which you gave them the privacy statement, indicate if they consent to be contacted for research, and click yes on the declaration. These fields are all mandatory. You can now click on the 'Complete' tab and save.

Declaration

All Information that I have provided to The Society as part of this application is true and correct.

I acknowledge the above Yes

Research

Would you be willing to be contacted for future research projects to improve our understanding of client needs and experiences?

I agree to be contacted Yes No

Privacy Details

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

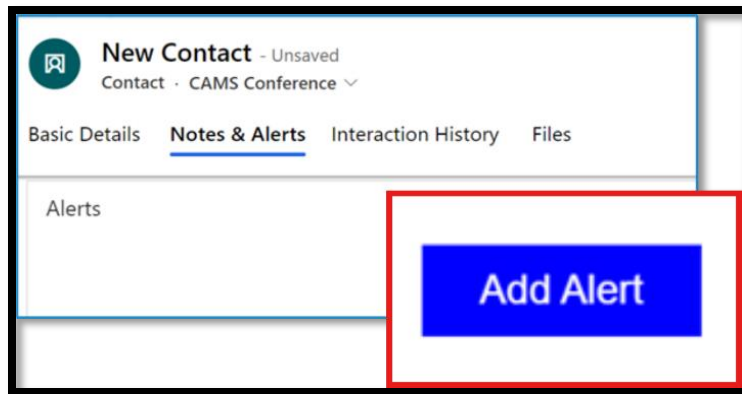
Date Privacy Information Discussed ---


How was privacy consent captured? ---

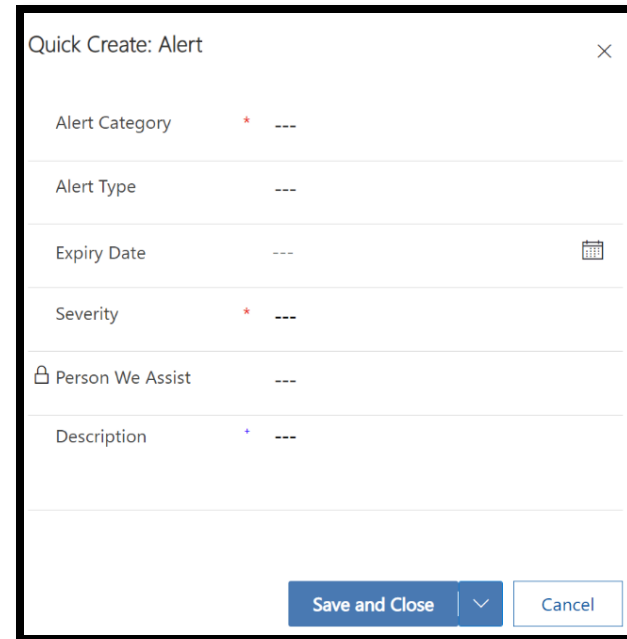
VINNIES REBUILDS RESTORES RENEWS

2. Creating a new client – Notes and alerts


You will have noticed that the page you are looking at has a tab called **Notes and Alerts**. While alerts are not mandatory, it's a good idea to use this function if there is something you think other members need to be made aware of. Case notes are also important, as they contain extra information that can't be quickly be recorded on the form. Let's start with alerts.



Alerts differ in severity and the severity is a subjective choice. You can create an alert by clicking on the 'Add Alert' button. CAMS will then display a window that looks like this: 



The screenshot shows the 'Quick Create: Alert' form with the following fields:

- Alert Category * ---
- Alert Type ---
- Expiry Date --- 
- Severity * ---
- Person We Assist ---
- Description * ---

Buttons: Save and Close, Cancel

2. Creating a new client - Notes and alerts



St Vincent de Paul Society
good works

You'll need to put in some details about the alert, including the category.

- **Alert category** is mandatory. Click on the magnifying glass and choose what category of alert it is. It could be financial, legal, related to the accommodation or other.
- **Alert type** is not mandatory, but it will give you more options to choose from
- **Expiry date** is not mandatory.
- **Severity** is mandatory. You can choose from low, medium or high.
- **Person we assist** is locked. Don't enter anything there.
- **Description** is not mandatory. This is for extra information that relates to the alert.

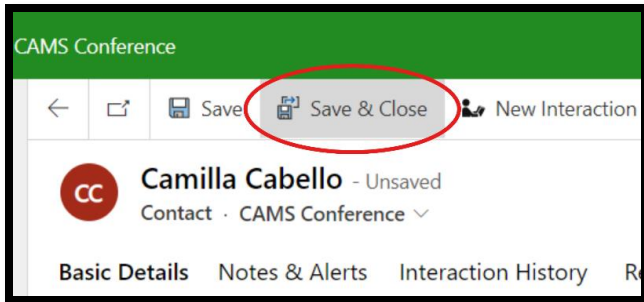
You can also add some notes at this stage in the Notes section. Click on Add Note and a form will pop up. NB: You can only add a note if you have saved the client record. Click on Save at the top of your screen.

A screenshot of a software interface showing a 'Notes' section. The word 'Notes' is displayed in a light grey font on the left side of a white rectangular area. On the right side of this area, there is a blue rectangular button with the text 'Add Note' in white.

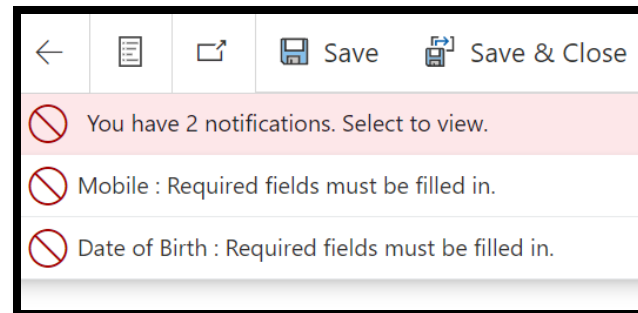
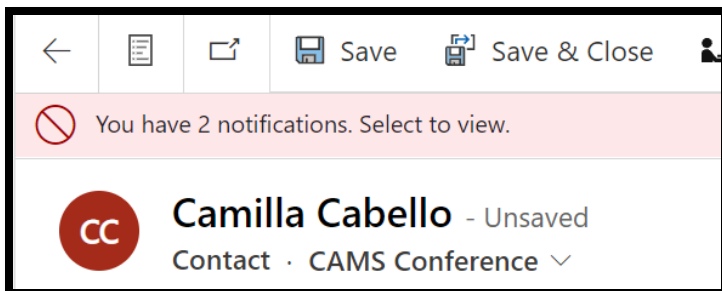
VINNIES REBUILDS RESTORES RENEWS

2. Creating a new client – saving and closing

You can now press Save and Close at the top of the record.

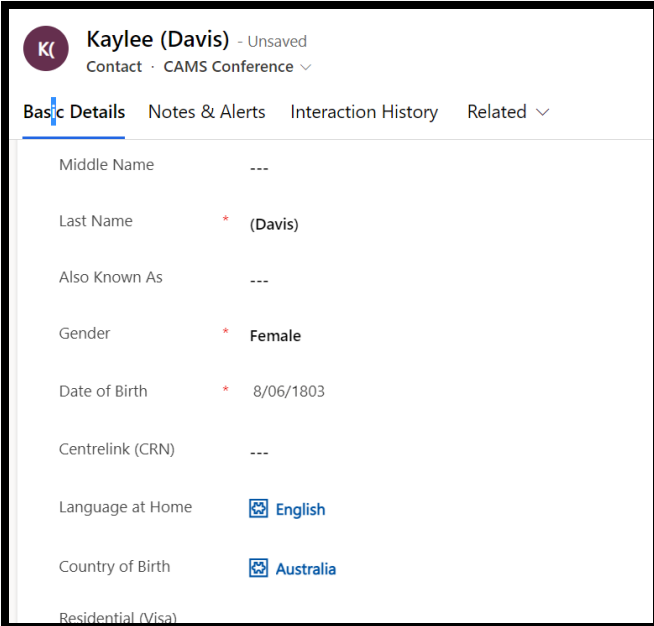


NB: if any information is missing, the system will tell you by displaying a notification message on the top of your screen in light red. It will also tell you which fields are missing. Click on the message and it take you directly to that field.



2. Creating a new client – updating a profile

If the client is an existing client, you won't need to create a new profile for them, but you may need to update some details, either because they have changed, or because they offer new information that isn't mandatory, but should still be included to give members a better picture of the client's circumstances. You should always check to see if basic details like phone numbers, addresses and other contact details haven't changed, and update them in the 'Basic Details' section of the profile.

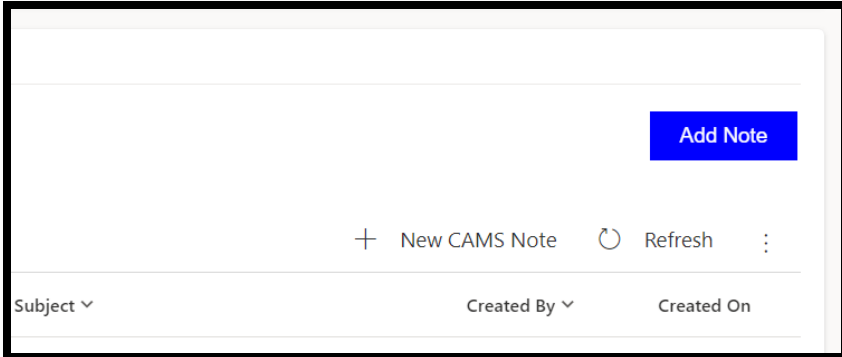


Kaylee (Davis) - Unsavd
Contact · CAMS Conference

Basic Details | Notes & Alerts | Interaction History | Related

Middle Name	---
Last Name	* (Davis)
Also Known As	---
Gender	* Female
Date of Birth	* 8/06/1803
Centrelink (CRN)	---
Language at Home	English
Country of Birth	Australia
Residential (Visa)	

You should also remain alert to things that may be said during the conversation that you may want to put in the 'notes' section. This might be something about why they are calling this time, any history they might mention that isn't already there, or anything a member may wish to know.



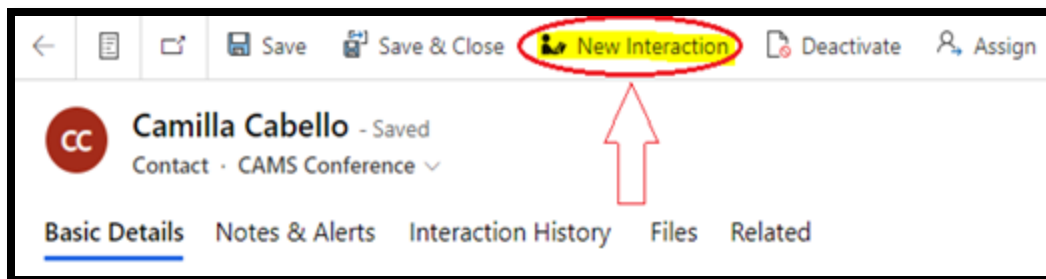
Add Note

+ New CAMS Note Refresh

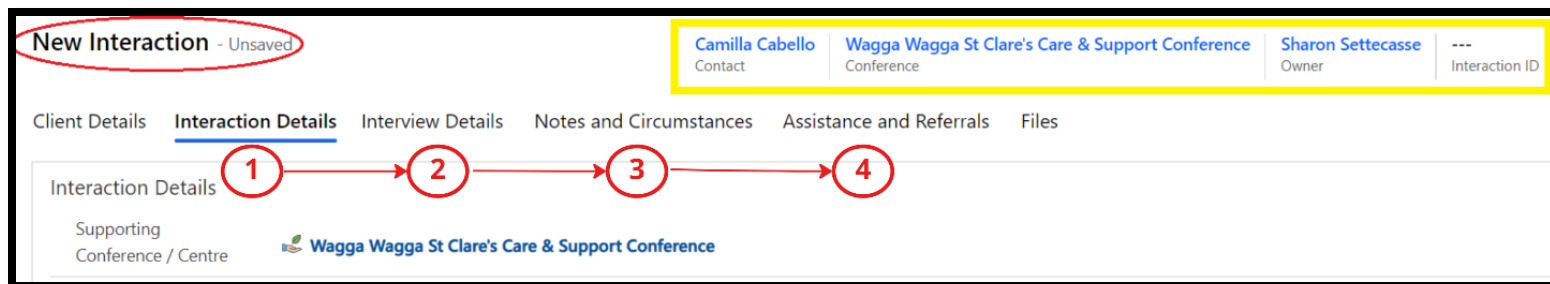
Subject	Created By	Created On
---------	------------	------------

3. Creating a new interaction – click on new interaction

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'**. On a new client profile this will be blank because you won't have had any interaction with them yet. But as we deal with the client, we will have to give more details. After the client profile has been saved, you can begin to do this.

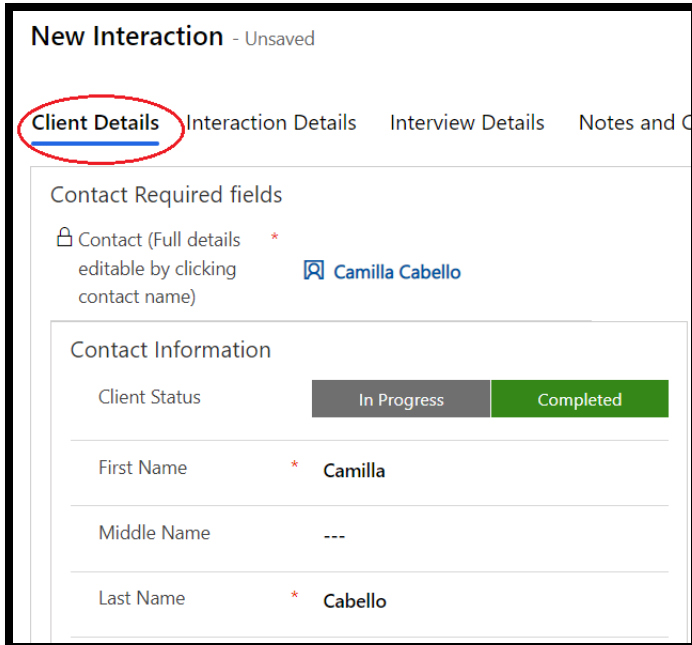


The header will already have key details about the client this interaction is linked to and what stage it is in. Fill out the necessary fields marked by a red asterisk in the following order.



3. Creating a new interaction – enter client details


Before you fill out the interaction details, it's a good time to check and see if any of the client's details have changed, like their address or phone number. If you need to do an update, go to the field that needs updating, enter the new information, and press 'Save' in the top left-hand corner. If the profile is 'in Progress', you must change it to 'Completed' All records that have recently been moved or migrated from Excel, GKO or other previous data systems will be 'in Progress'



New Interaction - Unsaved

Client Details Interaction Details Interview Details Notes and C

Contact Required fields

🔒 Contact (Full details *
editable by clicking
contact name)  Camilla Cabello

Contact Information

Client Status In Progress Completed

First Name * Camilla

Middle Name ---

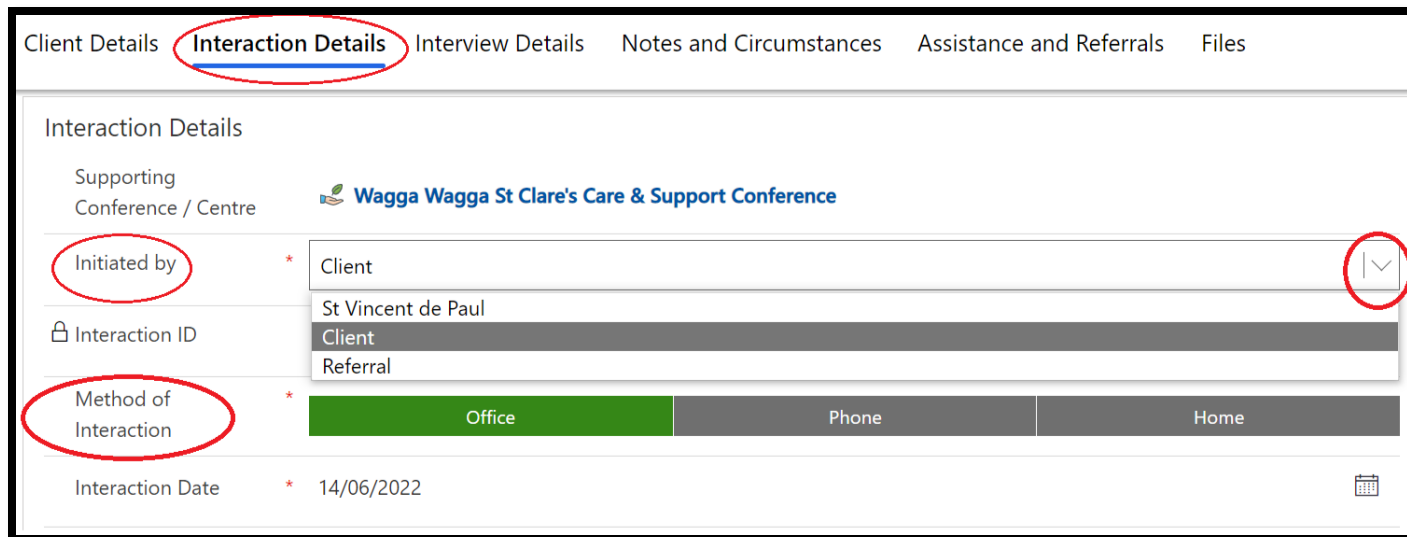
Last Name * Cabello

3. Creating a new interaction – interaction details tab

The information entered in this tab is about who initiated the interaction and where the initial contact occurred. The “Supporting Conference/Centre defaults to the Conference the client is linked to. (See below how to change this if you are assisting a client in a one-off situation.)


The default selection for who initiated the contact is the client. Change this by pressing the down button to show other options. If the contact was initiated by the Society eg Vinnies store, other Conference OR a referral For EG: friend/family, another organisation, an agency etc.


Select where the initial contact occurred. Did they phone to request assistance, did they walk into the centre or office?




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


Interaction Details

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

Initiated by * Client 

Interaction ID  St Vincent de Paul
Client
Referral

Method of Interaction * Office Phone Home

Interaction Date * 14/06/2022 

3. Creating a new interaction – save the interaction



Interaction Status: Keep this at “In Progress” until all interaction information has been entered. Select “Cancelled” if the client or a member does not wish to proceed. Please note that you **MUST** click on “Completed” to close an interaction and mark it as completed and done in the CAMS system. This should be done after you have entered all details, including assistance given and referrals, which we will come to later.

A screenshot of a web form showing a dropdown menu for 'Interaction Status'. The menu is open, displaying three options: 'In Progress' (highlighted in green), 'Completed' (grey), and 'Cancelled' (grey). The label 'Interaction Status' is followed by a red asterisk (*).

Interaction Status
Interaction Status *
<input type="radio"/> In Progress
<input type="radio"/> Completed
<input type="radio"/> Cancelled

CLICK “SAVE” TO CREATE THE INTERACTION

3. Creating a new interaction – sending a notification

Once you have created an Interaction, you'll be asked if you would like to send a notification to anyone else. Most of the time, this will be a 'yes' because you will want somebody else to know the details of any interviews you are setting up. In this instance, you'll only be able to send to a Vinnies email account, and this needs to be captured in the CAMS system. If there is no email account, a notification can't be sent.

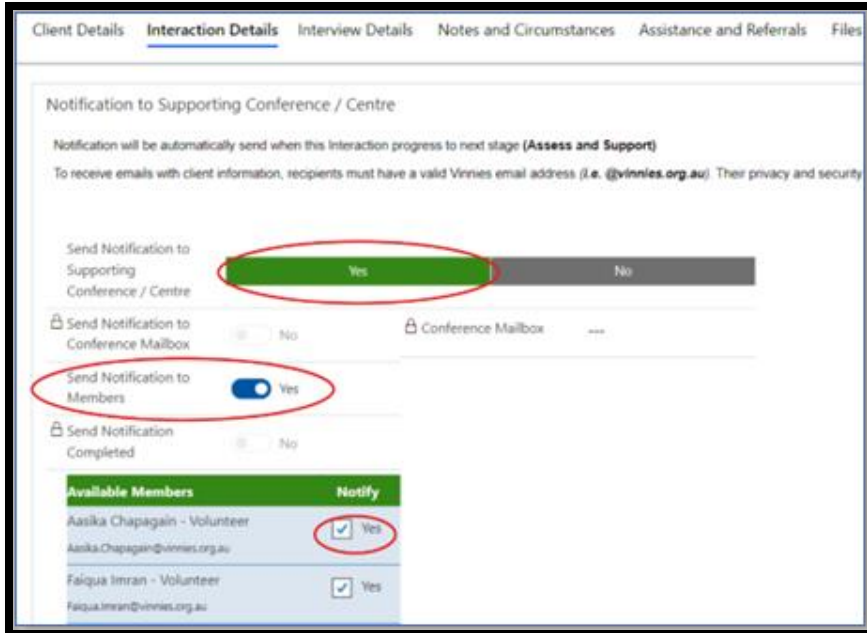
Step 1. Click on 'yes' to send notification.

Step 2. Click on the names of the members and/or volunteers you wish to send a notification to.

Step 3. Press 'Save'

Step 4. Send notification.

Step 5. Press 'Yes' to confirm.



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

Notification to Supporting Conference / Centre

Notification will be automatically send when this interaction progress to next stage (**Assess and Support**)
To receive emails with client information, recipients must have a valid Vinnies email address (i.e. @vinnies.org.au) Their privacy and security

Send Notification to Supporting Conference / Centre Yes No

Send Notification to Conference Mailbox No Conference Mailbox ---

Send Notification to Members Yes

Send Notification Completed No

Available Members	Notify
Aasika Chapagain - Volunteer Aasika.Chapagain@vinnies.org.au	<input checked="" type="checkbox"/> Yes
Faiqua Imran - Volunteer Faiqua.Imran@vinnies.org.au	<input checked="" type="checkbox"/> Yes