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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:

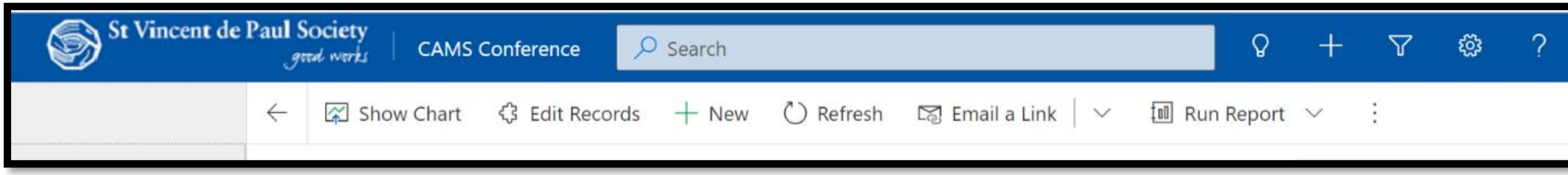
1. Searching for a client
2. Creating a new client record
3. Creating a new interaction, and
4. ..

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

1. Searching for a client

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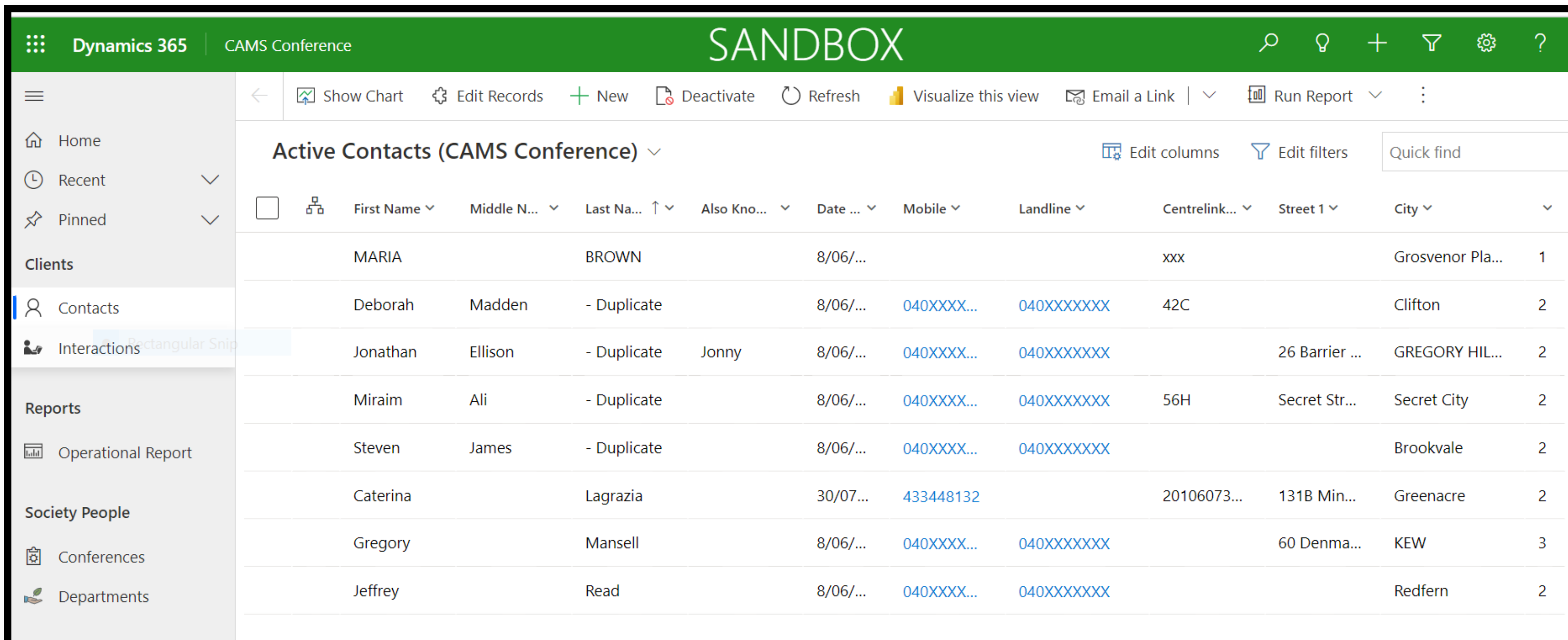
Once you log into CAMS, you'll see a page that looks like this. This is called the home page because it is the page you'll always start from when you want to look someone up to see if they're in the system or enter a new person into the system.



The 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

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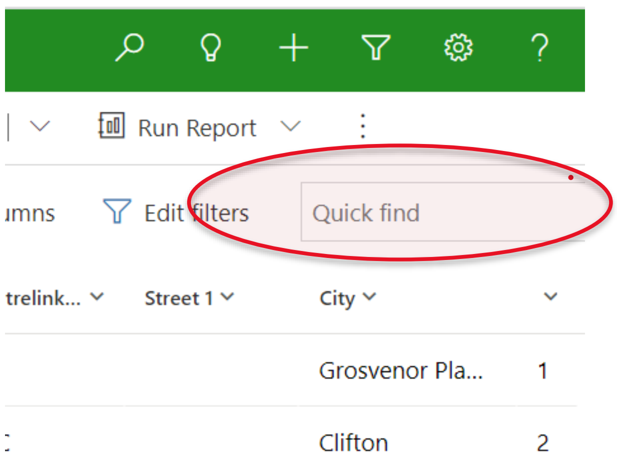
In the top right-hand corner of the home page. You'll see a box that says 'Quick find'. You can use this search for clients to see whether or not they are already in the system. You can enter their:



- 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.

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

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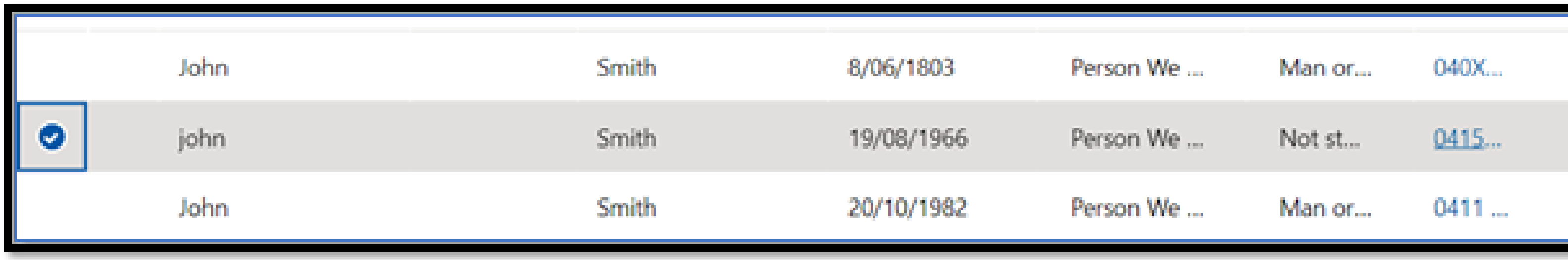
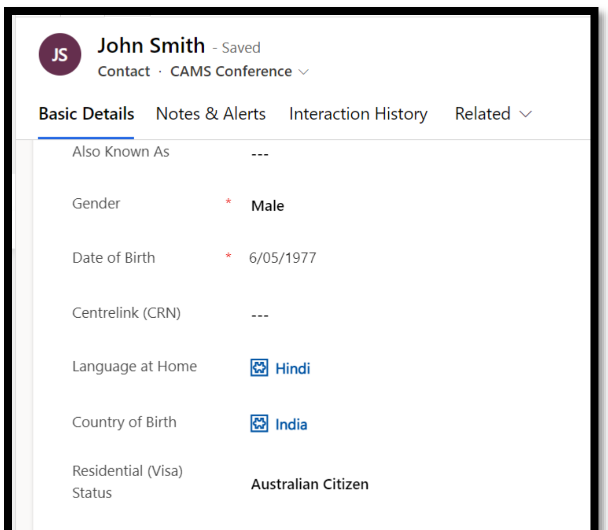
Take your mouse over the name of the client and double click on the client whose file you wish to see. Hovering the pointer anywhere on the row will make it turn grey. Clicking on the row will make a blue tick appear.





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.

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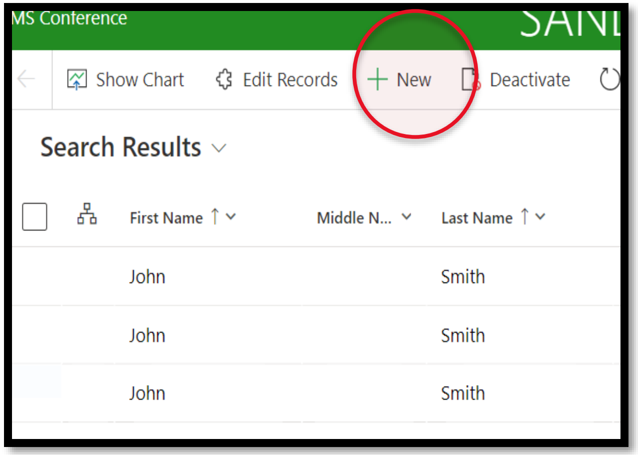
2. Creating a new client

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

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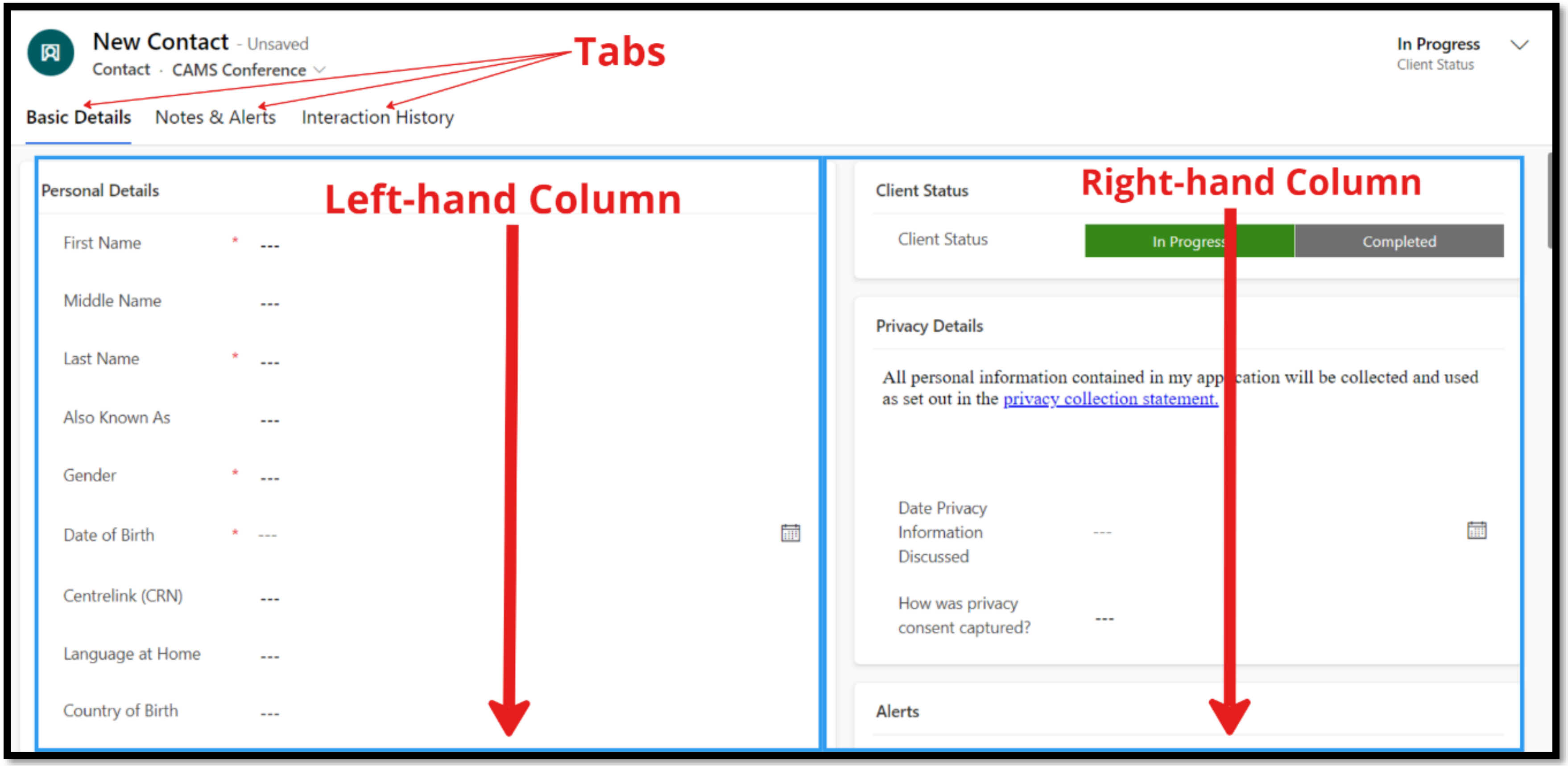
If you click on any of these Tabs that have the red arrow pointing to them, these fields will open up.



2. Creating a new client – filling in mandatory details

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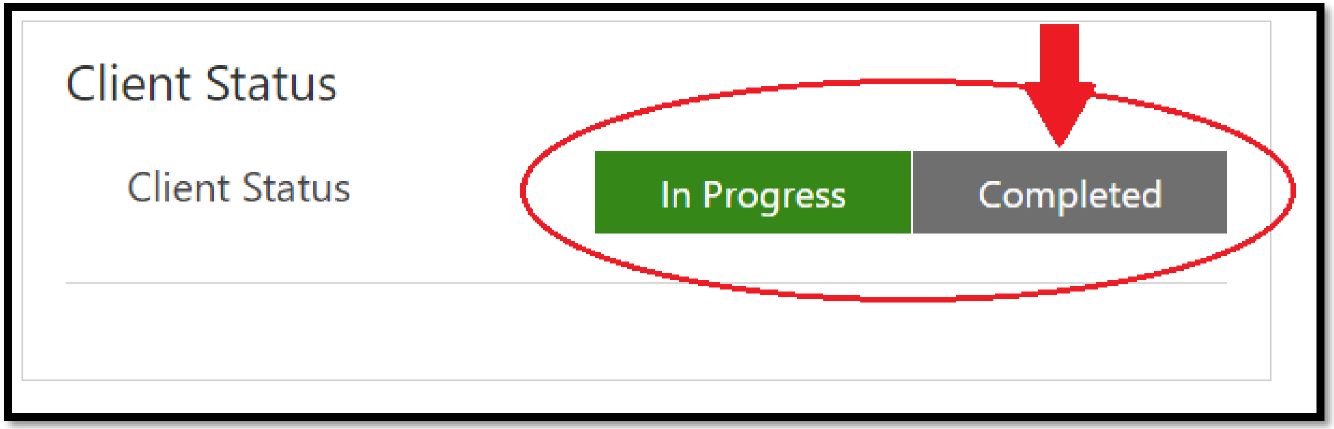
We're going to start with the Basic Details Tab. This will create a basic profile. You only need to enter the basic details of a person to create a basic profile. There is a quick way to know which details you need to enter. You just need to go to the top right-hand corner and click on the tab that says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

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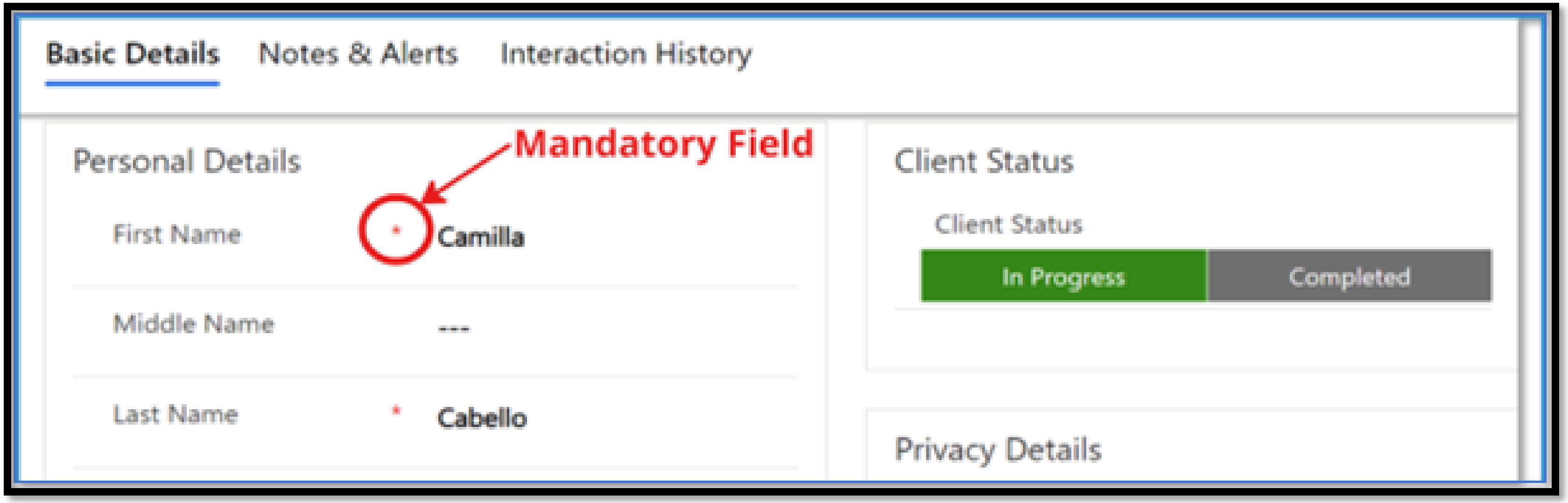
Step 3: Fill in the left-hand column. Fields marked with the red asterisk (*) are mandatory. You will not be able to save the client file without filling in those fields. You will see all Mandatory fields only if the Client Status is set to 'Completed'.



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

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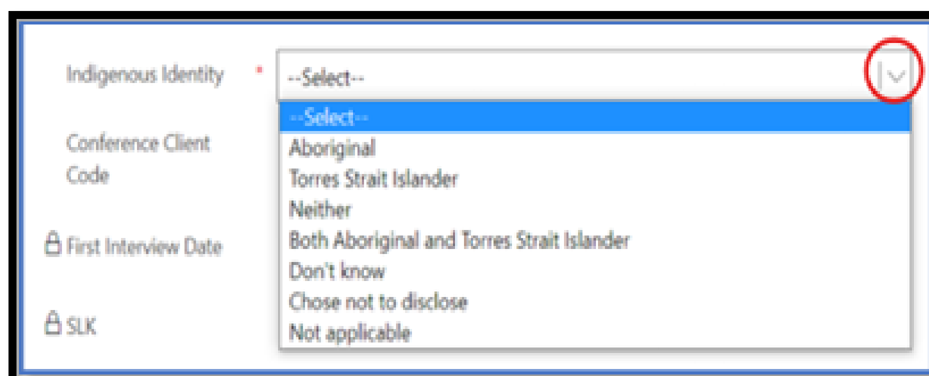
As you enter client details into system, you sometimes come across fields with multiple options and you have to select one. An example of this is the ‘Language at Home’ field. When you hover over the fileld, ‘Look for Language at Home’ will appear. When you start typing the first letters of a word like ‘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.



2. Creating a new client – accommodation types

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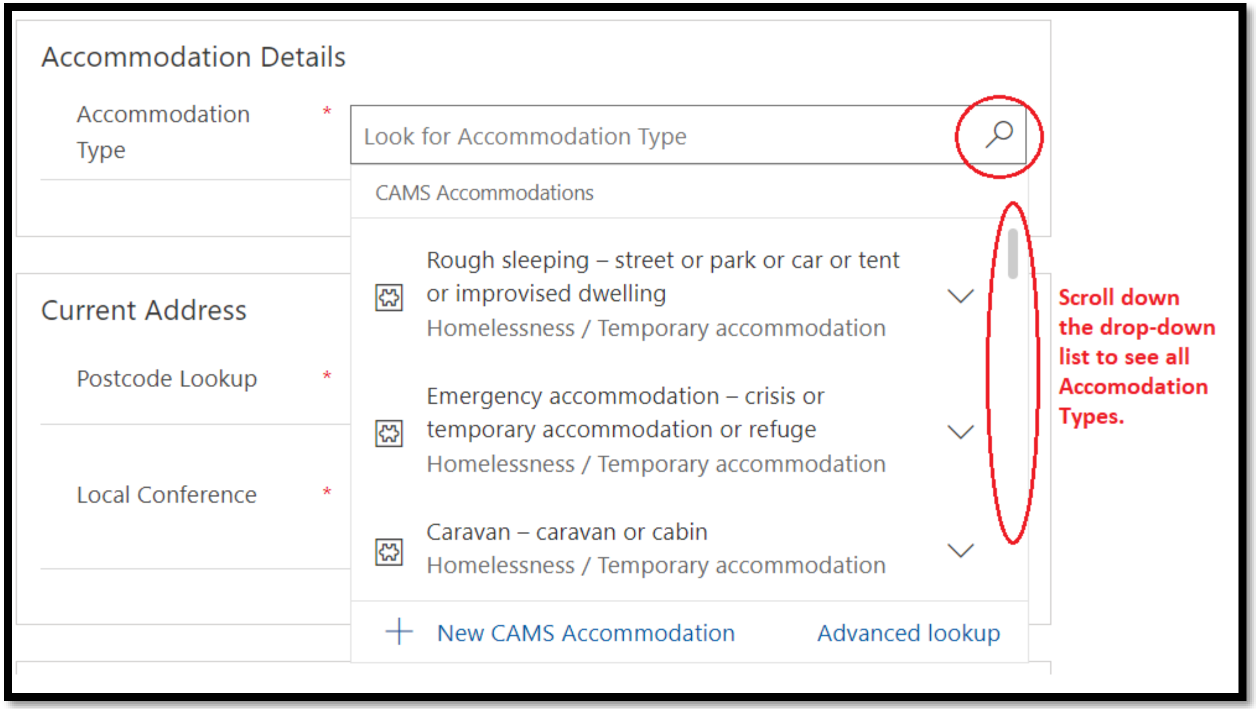
Accommodation type also requires use of a drop-down menu.



2. Creating a new client – entering address

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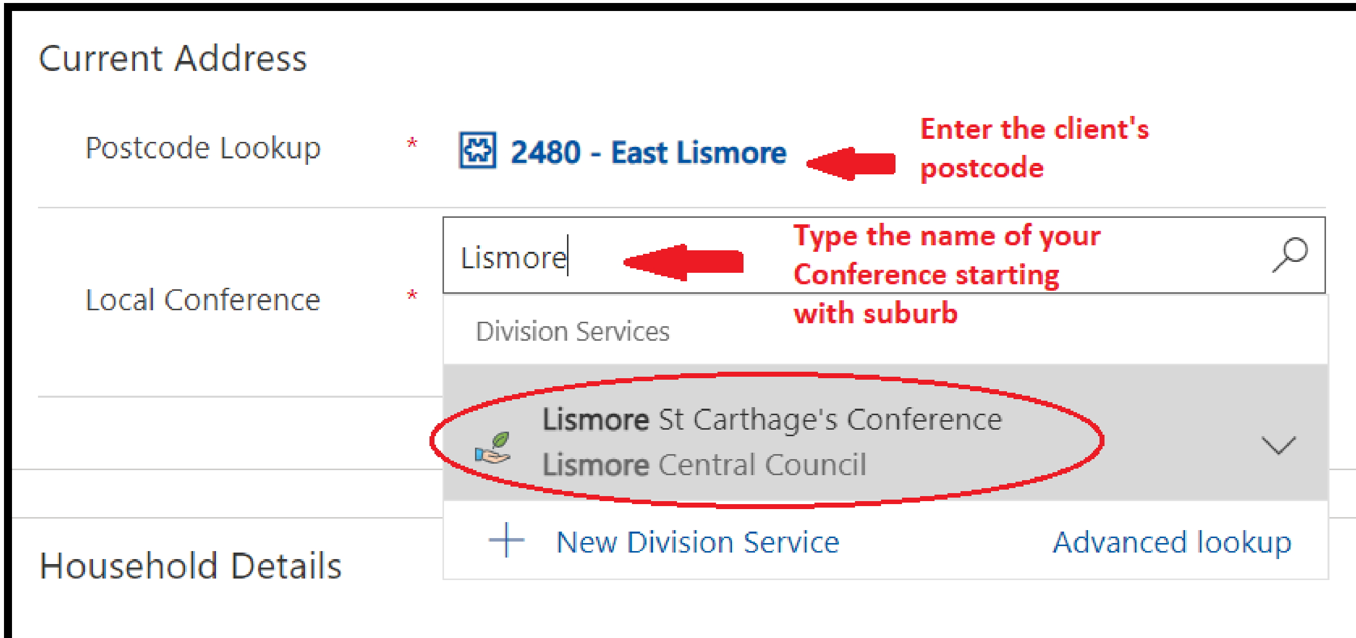
To enter a person's current address, you should start with the postcode. If the person is sleeping rough or in transitional housing, this is all that is required. Full addresses are mandatory for private rentals or non-temporary housing. The local Conference is also a mandatory field.

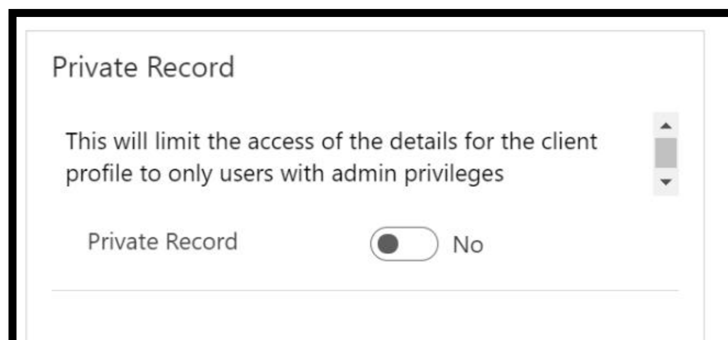


2. Creating a new client – creating alerts

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

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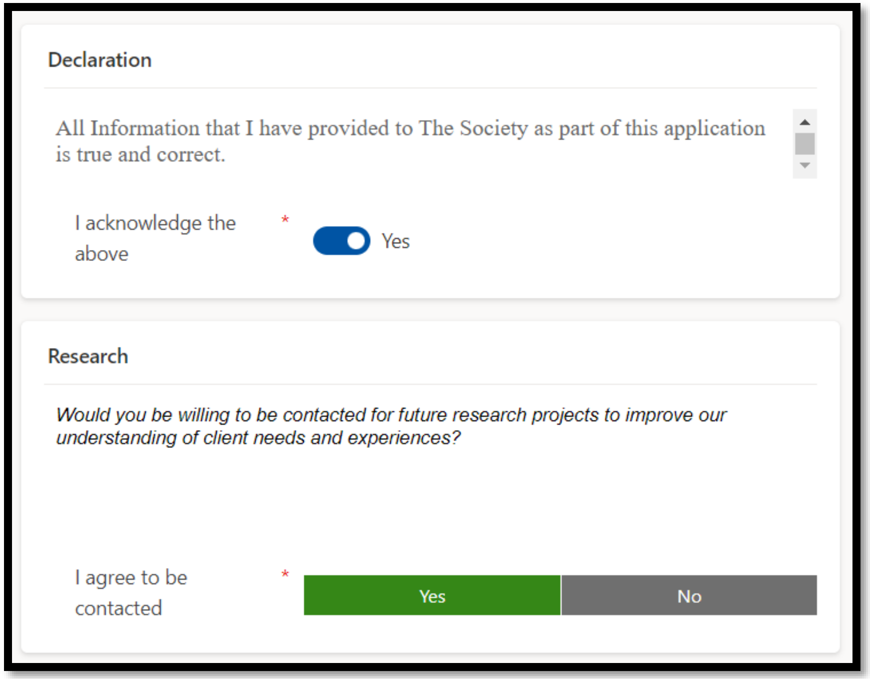
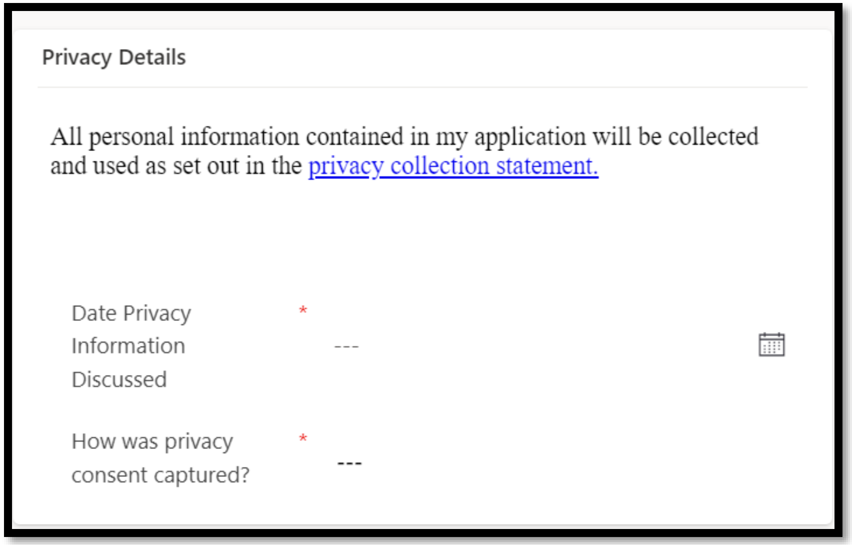
The final things you need to do is complete the privacy statement field by entering a date on which you gave them the privacy statement, indicate if they consent to be contacted for research, and click yes on the declaration. These fields are all mandatory. You can now click on the ‘Complete’ tab and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





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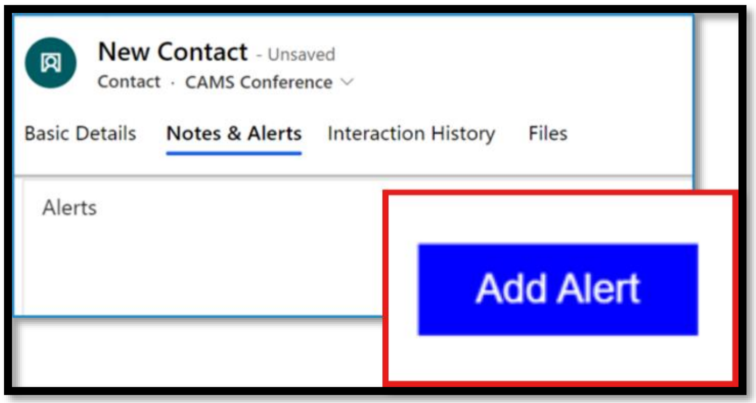
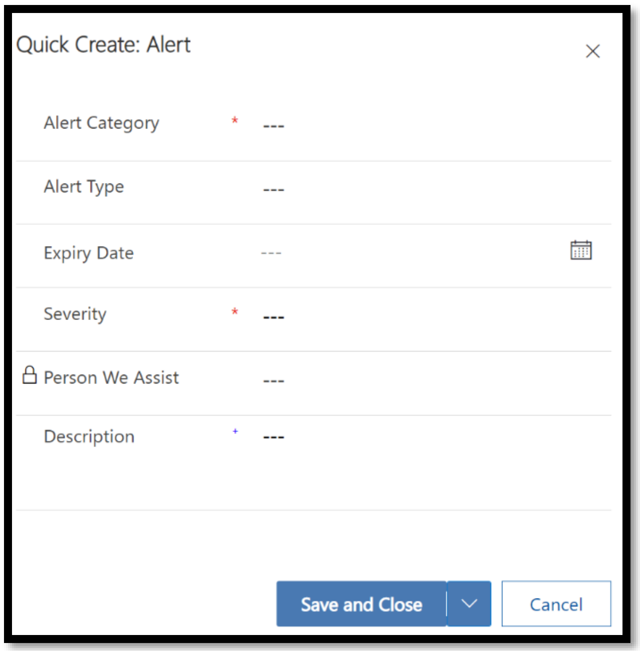
2. Creating a new client – Notes and alerts

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:

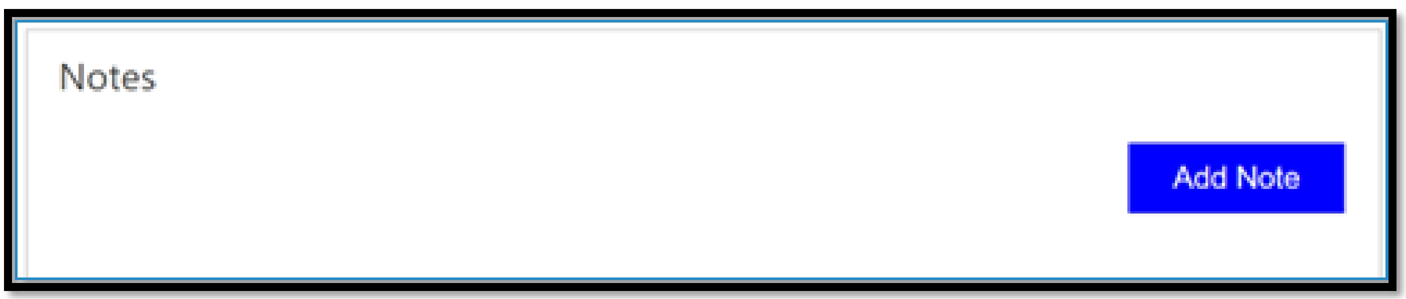


2. Creating a new client - Notes and alerts

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.



2. Creating a new client – saving and closing

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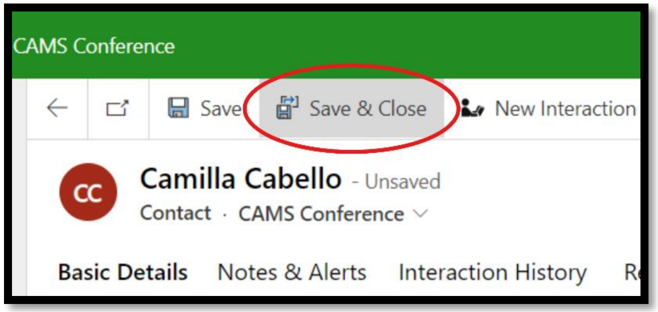
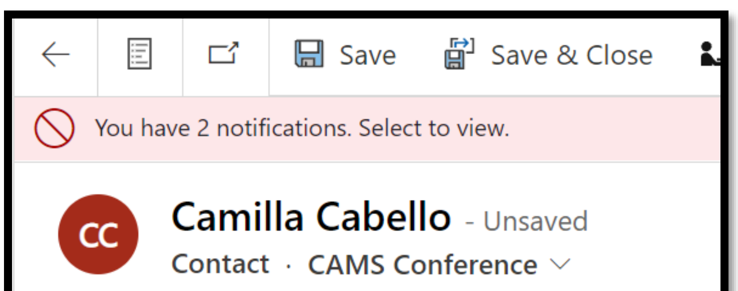
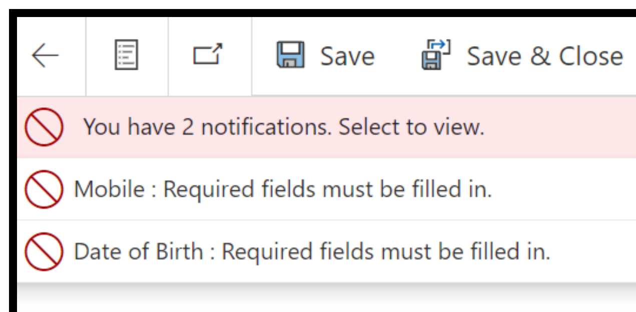
You can now press Save and Close at the top of the record.



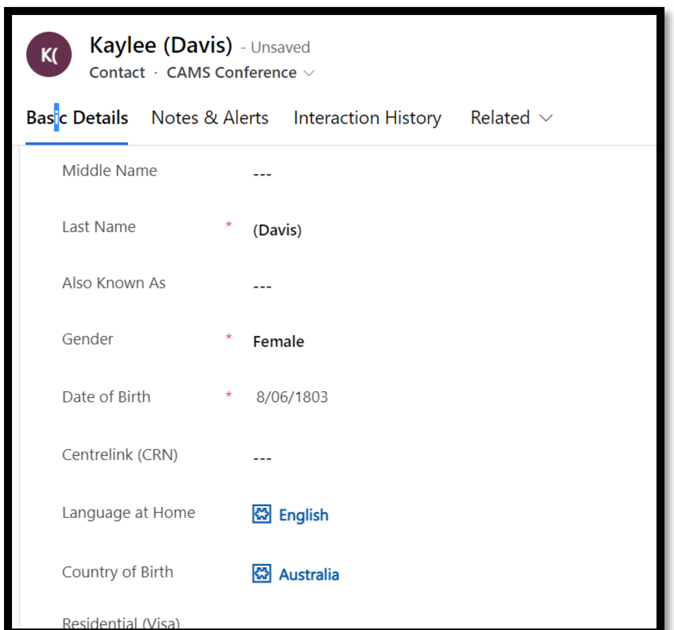
NB: if any information is missing, the system will tell you by displaying a notification message on the top of your screen in light red. It will also tell you which fields are missing. Click on the message and it take you directly to that field.



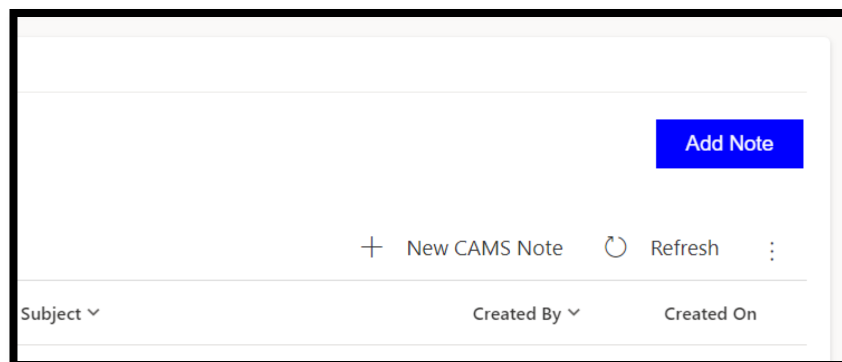


2. Creating a new client – updating a profile

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.



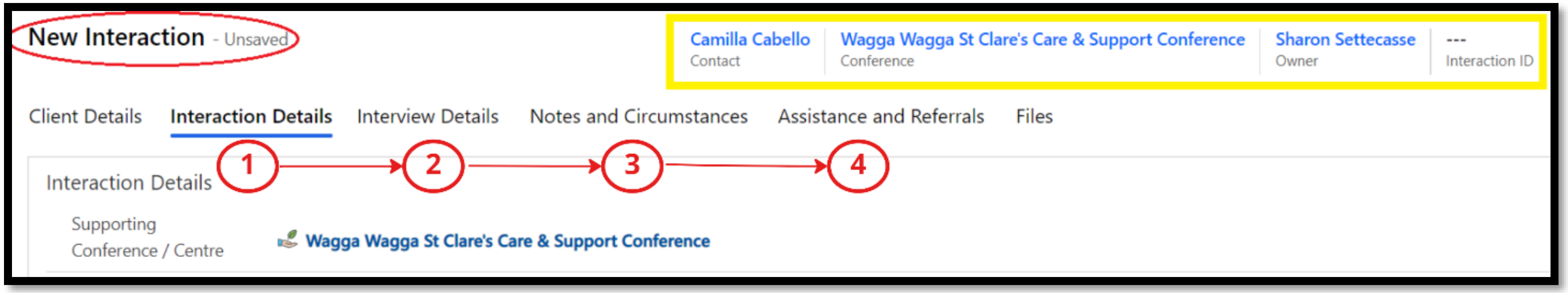
You should also remain alert to things that may be said during the conversation that you may want to put in the 'notes' section. This might be something about why they are calling this time, any history they might mention that isn't already there, or anything a member may wish to know.



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.



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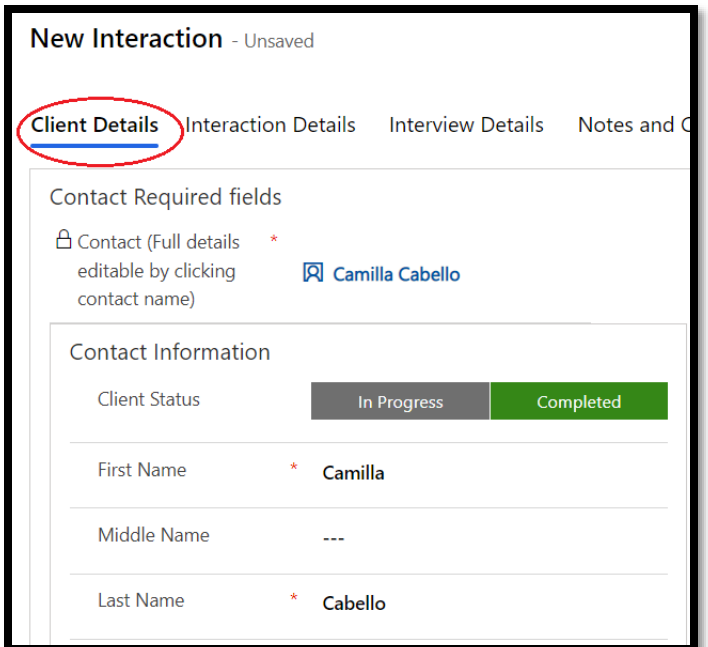
3. Creating a new interaction – enter client details

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'



3. Creating a new interaction – interaction details tab

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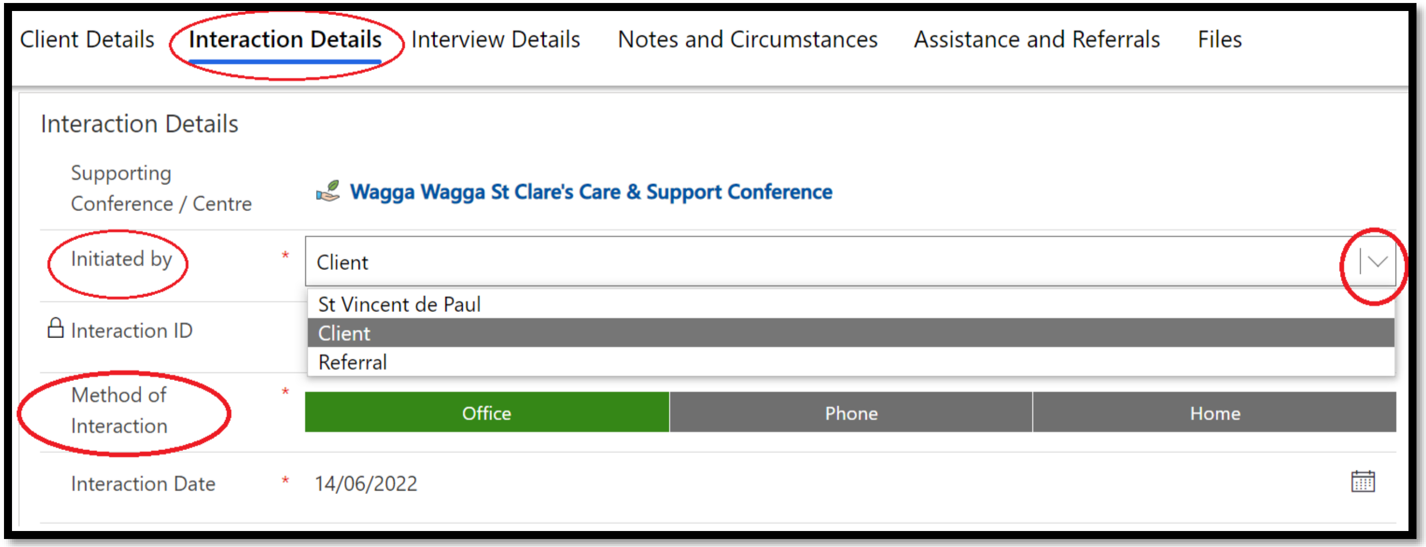
The information entered in this tab is about who initiated the interaction and where the initial contact occurred. The "Supporting Conference/Centre defaults to the Conference the client is linked to. (See below how to change this if you are assisting a client in a one-off situation.)
The default selection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



3. Creating a new interaction – save the interaction

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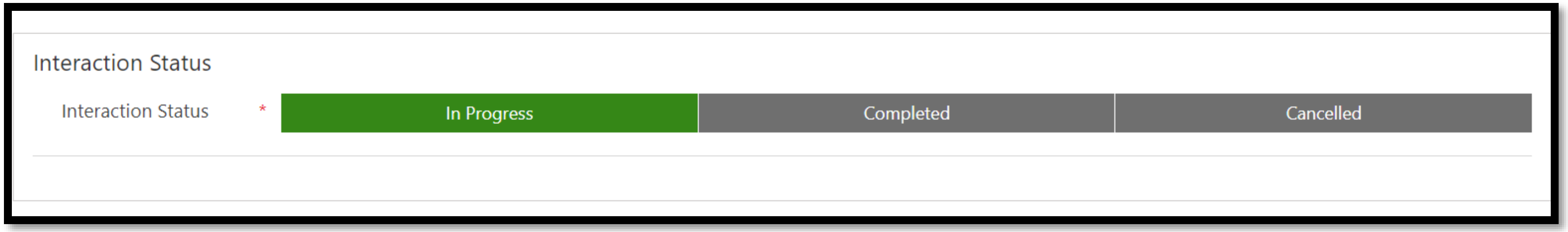
Interaction Status: Keep this at "In Progress" until all interaction information has been entered. Select "Cancelled" if the client or a member does not wish to proceed. Please note that you MUST click on "Completed" to close an interaction and mark it as completed and done in the CAMS system. This should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



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.

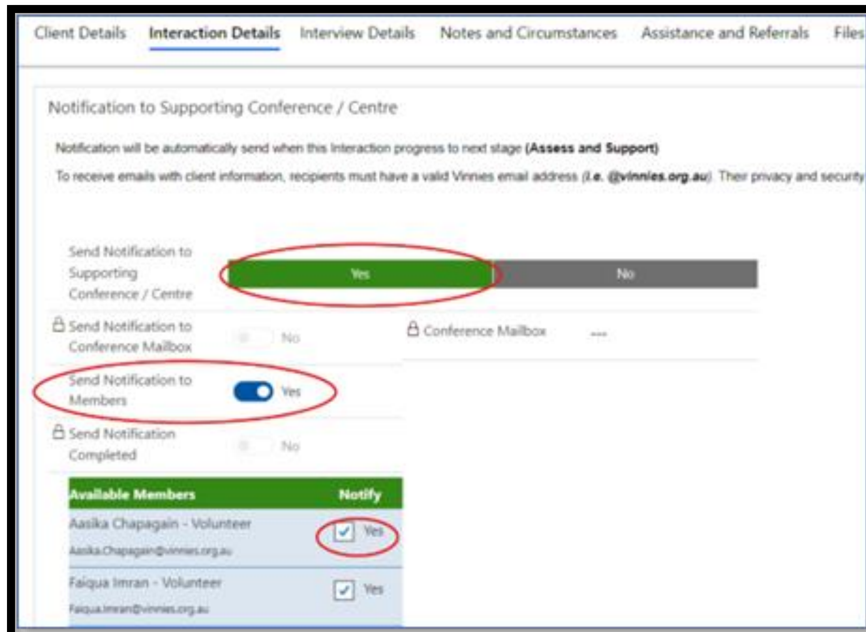
Step 1. Click on 'yes' to send notification.

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.



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