

Introducing the...

For Community Support Management


(Standard) Database



Overview

The *For Community Support Management* database allows organisations to manage data relating to:

- Clients
- Groups
- Contacts
- Staff, and...
- Workflow



FCSM - For Community Support Management

Purpose

Allowing you to manage data relating to:



- clients - general details, case notes, evaluations...
- groups & projects - general details, notes, evaluations...
- contacts - referrers, services provided, etc...
- resources - descriptions, maintenance and loan logs.
- policies & procedures - with links to full documents.
- staff - general details, issues, incidents, etc...

Getting Started

A menu is presented on the left side of the screen. Click each menu item in turn and familiarise yourself with the various components within the application.

It is suggested that you begin with the menu item titled: Defaults.

Click on the Print Help button below to view and print selected help details for this application.



[More >>](#) [Print Help](#) [About](#) [Close](#)

↓ Clients - List

As with many components in the **FCSM** database, the clients component opens with a **List Screen** in which you are able to:

- **sort** the client list using the button at the top of the screen,
- **filter** the clients with the filter options at the bottom of the screen,
- **add/edit** selected client details and/or...
- **select** a client in the centre of the screen by double clicking on a client's First Name field.

(NOTE: The double click field is identified by the darker background colour)

	First Name	Last Name	Phone	Age	Gender	Cultural Bkgrnd	Status	
▶	Client	First Sample	1234 1234	16	Male	Anglo	Active	Or
	Client	Second Sample		15	Female	ATSI	Active	Sa
*								Or

Clients - Detail

Once a client is selected, you are able to add and edit such details as:

- **General contact details** - phone, email, addresses, etc.
- **Background details** - referrer, school, year, group, cultural background, gender, etc.
- **Ongoing support details** - case notes, emergency and support details, evaluations, etc.

(NOTE: Double click fields are identified by grey background colouring within the fields. EG: Referrer, School, Cultural Background, Status, etc.)

The screenshot displays two overlapping windows from a software application. The top window, titled 'Clients List', contains a table with the following data:

First Name	Last Name	Phone	Age	Gender	Cultural Bkgrnd	Status
Client	First Sample	1234 1234	16	Male	Anglo	Active
Client	Se					

The bottom window, titled 'Client Details', shows the following information:

- First Name:** Client
- Last Name:** First Sample
- Phone:** 1234 1234
- Mobile:** 04321 111 222
- Email:** first@a_provider.com.au
- Referrer:** Organisation Manager, Internal
- School:** (empty)
- Ref No:** 1234
- Year Level:** TAFE
- Directory:** C:\ForCSManagement\Documents\ClientDocuments\cs1-1\
- Address:** Sample Address
- Suburb:** ABBEYWOOD
- State:** QLD
- Postcode:** 4613
- Country:** Australia
- Date Created:** Sunday, 1 November 2009
- Time Created:** 10:13 AM
- Date Referred (In):** Sunday, 3 May 2009
- First Interview Date:** (empty)
- Final Interview Date:** (empty)

At the bottom of the 'Client Details' window, there are tabs for 'Personal Details', 'Client Notes', 'Notes', 'Children', 'Emergency Contact', 'Urgent Medical Info', 'Evaluation', and 'Member of Group'. The 'Personal Details' tab is active, showing:

- Cultural Background:** Anglo
- Status:** Active
- CS Officer:** Organisation Manager
- Is Parent?:**
- DOB:** 12/04/1994
- Age:** 16
- Gender:** Male
- To be included in Stats?:**
- ArchiveDate:** (empty)
- Funding Type:** Fund Type1

Buttons at the bottom include 'Copy This', 'Add Referral', 'Workflow', 'Lists', 'New', 'Help', and 'Close'. The status bar at the very bottom indicates 'Record: 1 of 2'.

Clients – Case Notes

- Many of the application's statistics are dependent on the entry of client and group details, and the entry of their Case Notes and Evaluations.
- *It is best* if the Case Note and Evaluation Groups and Types are decided on, agreed to and entered into the database *before using the Case Notes and Evaluations components*. A set of worksheets have been provided in the User Manual to assist with this.

You are able to add *Client (Case) Notes* to each client via the Client Notes tab:

- Add/select an entry date and select a client note type and funding type (*where applicable*).
- Double click on the **Details** field to add the Case Note detail, a start and end date, and time spent (*where applicable*).
- Add, edit or select a Case Note Template – if and as required.

The screenshot displays the 'Case Notes' application interface. On the left, a table lists case notes with columns for 'Entry Date', 'Type', and 'Details'. The 'Details' column for the first entry is circled in red. Below the table are buttons for 'Copy This', 'Add Referral', and 'WorkFlow', and a date range filter set to '6/01/2010'. On the right, a 'Case Notes' window is open, showing a 'Detail' view of a case note. It includes a 'Select Template' dropdown menu with options for 'Counselling Template' and 'Group Meeting Template', a text area for 'Sample Detail', and fields for 'Start Time', 'End Time', 'Hours', and 'Mins'. A 'Close' button is at the bottom right.

Entry Date	Type	Details
17/03/2010	Individual, by Client	Sample Detail
* 6/07/2010	Not Defined	

Groups

The *Groups* component allows you to add and edit such details as:

- **General details** - name, dates, description, etc.
- **Stakeholder details** including: participants, facilitators, stakeholders and urgent medical details.
- **Ongoing Management** – group (file) notes and evaluations.

The screenshot shows two overlapping windows from a software application. The background window is titled "Groups List" and contains a table with columns for "Title", "Details", "Main Co-ordinator", and "Select". One row is visible with "Sample Group" as the title and "This is a weekly youth group providing a range of a" as the details. The foreground window is titled "Group Details" and contains a form for editing the "Sample Group".

Group Details Form Fields:

- Title:** Sample Group
- Referrer:** Organisation Manager, Internal
- Main Co-ordinator:** Primary Officer
- Directory:** C:\ForCSManagement\Documents\GroupDocuments\cs1-4\
- Details:** This is a weekly youth group providing a range of activities to build self esteem.
- Date Created:** Monday, 1 March 2010
- Time Created:** 1:10 PM
- Start Date:** Monday, 3 May 2010
- Finish Date:** Tuesday, 13 July 2010
- Date Finished:** (empty)
- Is this a joint/collaborative Planning Event?:**
- Funding Type:** Fund Type1

Group Notes Table:

Entry Date	Type	Details	Funding Type
15/03/2010	Session Review	Session 1:	Extra
* 5/07/2010	Not Defined		

Case Note Filter: Case Note Between 5/01/2010 and 5/10/2010

Buttons: Copy This, Lists, New, Help, Close

Status Bar: Record: 1 of 1

Contacts and Staff

The *Contacts* and *Staff* components allow you to add and edit such details as:

- **General contact details** - phone, email, addresses, etc.
- **Grouping details – Contacts:** organisation type, contact role, notification preference, preferred user level.
- **Staff:** department, job title, status, employment type.

The screenshot displays a software interface with two main windows. The 'Contacts List' window shows a table with columns for Last Name, First Name, Organisation Name, Contact Role, Phone, and Organisation. The 'Contact Details' window is open over the table, showing a form for editing a contact. The form includes fields for First Name, Last Name, Organisation Name, Is School?, Contact Role, Organisation Type, Phone, Mobile, Fax, Email, Email Owner, Entry Date, Office/Apartment, Street, Suburb, State, Post/Zip Code, Country, Notification Preference, and Preferred User Level. A search filter is visible at the bottom left of the 'Contacts List' window, and a status bar at the bottom of the 'Contact Details' window shows 'Record: 2 of 2'.

Last Name	First Name	Organisation Name	Contact Role	Phone	Organisation
Manager	Organisation	Internal	Associate		Third Sector
Contact	Sample	Local Counselling Service	Associate	3344	Third Sector

Contact Details

First Name: Sample
Last Name: Contact
Organisation Name: Local Counselling Service
Is School?
Contact Role: Associate
Organisation Type: Third Sector Organisation
Phone: 3344
Mobile: 0411
Fax: 1122
Email: frank@another_provider.com.au
Email Owner: Frank
Entry Date: 01-Mar-10

Details | Notes

Office/Apartment:
Street:
Suburb:
State:
Post/Zip Code:
Country:
Notification Preference: Mail
Preferred User Level: 1
*Note: Level 1 is the highest

Add Compliance Reminder Copy This Lists New Help Close

Record: 2 of 2


Workflow – Adhoc Contacts

- The **Workflow** component allows you to add, edit and track **Adhoc contacts**.
- As a person rings in or calls in looking for information and/or are making a general enquiry, their contact can be recorded as an **adhoc contact**.

Adhoc contact details include:

- Date of contact
- Type of person
- Gender
- Estimated Age
- Cultural Background
- Outcome, etc.

Note: where a selection is not known, a '**Not Known**' entry can be selected.

Entries within the various drop-down lists, such as Cultural Background, Contact Type etc, can be added and edited by your team via the **Lists** button  at the bottom of the screen.

The screenshot displays the 'Workflow' application window. The main area shows a table of 'Ad Hoc Contact' records. The table has the following columns: Contact Date, Contact Type, Gender, Age, Cultural Bkgnd, Contact Details, Outcome, First Brief, and Case Worker. Two records are visible, both dated 6/07/2010. The first record has Contact Type 'Student', Gender 'Male', Age '15', Cultural Bkgnd 'Anglo', Contact Details 'Office', Outcome 'Pract Asst', and Case Worker 'Organisation Man:'. A dropdown menu is open for the Contact Type field, showing options: Client, Not Defined, Parent, Student, and Worker. The interface also includes a sidebar menu with options like Clients, Groups, Contacts, Staff, Workflow, Reminders, Stats Report, Login, and Introducing. At the bottom, there are search filters for Search String, Outcome, and Type, along with date range selection (Between: 6/07/2009 and 6/08/2010) and report date selection (For Report: 1/04/2010 to 30/06/2010).

Workflow – Referrals, Marketing & Brokerage

The *Workflow* component also allows you to add, edit and track such details as:

- **Referrals In and Out** – listing of those who referred clients in, and to whom clients have been referred.
- **Marketing Materials Distributed** – name, detail, date sent, etc
- **Brokerage** – for tracking moneys or equivalent provided to clients.

The screenshot shows the 'Workflow' application window with the following data in the table:

Details	Method	Date Sent	Sent To	Status	No. Distributed
New Service Provision	Mail	6/07/2010	All Contacts	Status 1	400
New Youth Group					0
	Email				0
	Mail				
	New Method				

At the bottom of the window, there is a search and filter section with the following fields and buttons:

- Search String:
- Method:
- After:
- Buttons: Reset, Clients, Print, Lists, Help, Close

Stats Reporting

With data entry appropriately structured, **FCSM** allows you to print one or more periodic statistical reports.

- **Funding/Program specific report** – a number of specific funding types or programs have had reports developed in line with applicable funding obligations.
- **General Stats Report** – a general statistics report is also available for more general information and internal use.

The image displays two overlapping screenshots of the 'Stats Report' application interface. The top screenshot shows the 'Filters' tab with 'Report Sections To Show' selected. It includes input fields for 'First Interview Date' (Between: 1/07/2010 and 30/09/2010), 'Funding Source' (Fund Type1), 'Referred By' (All), and 'School' (All). The bottom screenshot shows the 'Settings for: Default' tab with a list of report sections and their checkboxes. The sections include Clients, Clients Case Notes, Clients Evaluation Notes, Clients Evaluation By Item and Gender, Projects, Project Case Notes, Project Evaluation Notes, Groups, Group Case Notes, Group Evaluation Notes, Workflow Referrals In, Workflow Referrals Out, Workflow Marketing, Workflow Brokerage, and Workflow Ad Hoc. A 'New Settings' button is also visible.

Stats Reporting – Program-Specific Reports

As part of our commitment to supporting the various Third Sector programs, we look to maintain a number of **Funding/Program specific statistical reports** – developed around the program-specific funding obligations.


These various program-specific reports *need to be updated and added to from time to time* – depending on the many and varied programs, but also depending on shifts in focus within the various government departments.

Summary Report

FYSM Vers 02

Summary between dates: 1/07/2010 and 30/09/2010

User Name
Street Address, Suburb State Postcode
Phone: Ph Number, Fax: Fax Number
Email: Your email Account



	Outcome Performance Measures	Number
Oc1	Number of referrals to the YSC	0
Oc2	Number of cases opened	0
Oc3	Number of contact sessions	0
Oc4	Final evaluations with positive 'Improved engagement in learning'	0
Oc5	Any evaluation with positive 'Progress towards educational goals'	0
Oc6	Any evaluation with positive 'Im	
Oc7	Number of cases closed	
Oc8	Number of referrals (out) to oth	
Oc9	Number of groups undertaken	
Oc10	Number of participants in group	
Oc11	Evaluation with YSC Service	
Oc12	Number of project undertaken Number of participants in projec	
Oc13	Marketing sent	
Oc14	Marketing 'Taken Up"	
Oc15	Number of resources distributed (e.g. newsletters, email updates)	

Stats Report

Filters | Report Sections To Show

First Interview Date:
Between: 1/07/2010 and 30/09/2010 < > (by quarter)

Funding Source: Fund Type1 0 0

Referred By: All 0 0

School: All 0 0

Reset

YSC Report

YSC Report

Start Date: 1/07/2010 < Month >

End Date: 30/09/2010 < Quarter >

Summary Report Close

Setting Up: Defaults

FCSM allows for a fair degree of customisation. Much of this should be addressed on initial setup.

In the *Defaults* component, you are able to add/edit/set:

- *Your organisation's Details (User Info tab)* – name, address, phones, etc (*which appear on multiple reports*).
- *Application Preferences (Application tab)* – screen sizes, formats, registration code, machine code (*created by you where one or more copies are being run on a laptop*), etc.

The screenshot shows the 'Defaults' application window. The sidebar on the left contains a navigation menu with the following items: Clients, Groups, Contacts, Staff, Workflow, Reminders, Stats Report, Login, Introducing, Defaults (selected), Data File Management, Introducing, and Exit. The main content area has tabs for 'User Info', 'Application', 'File Path', 'Logo', 'Year Levels', 'Application Variables', and 'PPR Reporting'. The 'Application' tab is active, displaying the following settings:

- Menu on Left of Screen:**
- Maximise All Screens:**
- Data File Link Required:**
- Startup Screen:** Introducing (dropdown menu)
- Menu Height:** 8600 (text input) with an **Apply** button
- Screen Width:** 10700 (text input) with a **Reset** button
- Machine Code:** cs1 (text input)
- Unregistered Version:**
 - Registration Code:** FCSTDVUI2374 (text input) with a **Check** button
 - Reports Produced By:** For Community Support Management (text input)
- Match List Screen Colours:**
- Flat & Non Bold View:**
- Add Colour to Menu & Intro:**
- Add Colour to List Screens:**

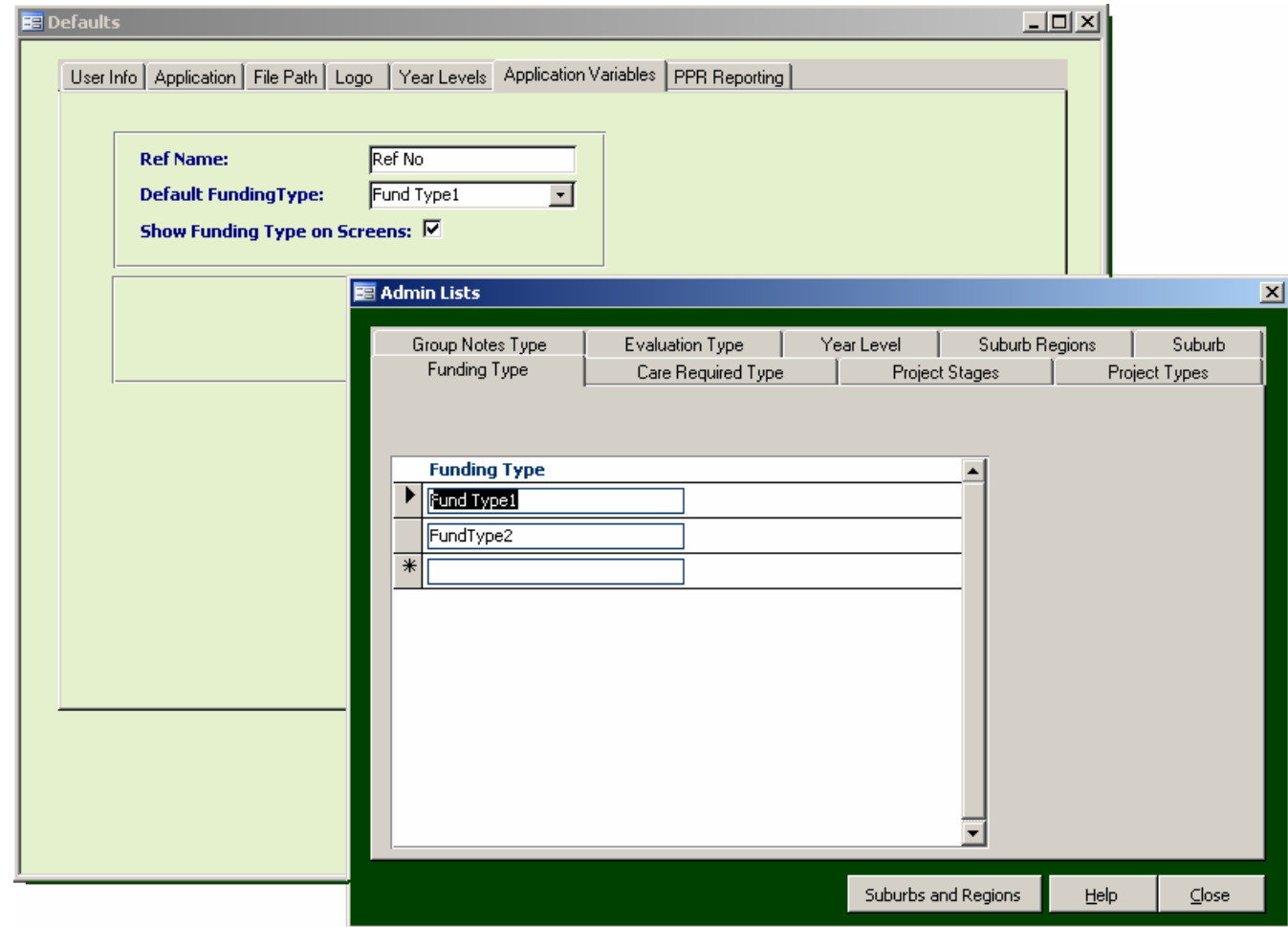
At the bottom of the window, there are several buttons and options:

- Select Colour:** Detail Screen, Popup Screen, Menu Items
- Re-order:** Backup Your Default Settings?
- Lists**, **Help**, **Close**

Setting Up: Defaults (Continued)

The *Defaults* component also allows you to add/edit/set:

- **Logo** (*Logo tab*) – copy and paste your organisation’s logo, so that it appears on the Main Menu and selected reports.
- **Application Variables** (*Application Variables tab*) –
 - Clients may have an internal **reference** – you can set your name for that reference field,
 - Click on the **Lists** button at the bottom of the Defaults screen and add and edit **Funding** (*or programs*) **Types** – as per your program funding. Then select a default Funding Type for use within the database.
 - If your organisation only has **one Funding source**, you can set the default funding type and turn off the funding type drop-down lists on the various screens.



Setting Up: Drop-Down Lists

Each component within *FCSM* allows you to categorise your clients, groups, contacts, staff etc with a range of drop-down selections.

For instance, in looking at the *Client Detail* screen there are drop-down boxes provided for such fields as:

- Referrer and School
- Year Level
- Suburb
- Cultural Background, Status and Community Support Officer
- Gender and Funding Type.


Some of these entries would be entered into the Contacts and Staff sections of the database. Others would be added to what are known as: '*Admin Lists*' – (see the following page).

The screenshot displays the 'Client Detail' screen in the FCSM system. The form is divided into several sections. The top section contains personal details: First Name (Client), Last Name (First Sample), Phone (1234 1234), Mobile (04321 111 222), and Email (first@a_provider.com.au). The Referrer is set to 'Organisation Manager, Internal' and the School is empty. The Ref No is 1234 and the Year Level is TAFE. The Directory path is C:\ForCSManagement\Documents\ClientDocuments\cs1-1\, with buttons for Edit, Create Directory, and Locate. The Address section includes Suburb (ABBEYWOOD), State (QLD), Postcode (4613), and Country (Australia). The Date Created is Sunday, 1 November 2009, and the Time Created is 10:13 AM. The Date Referred (In) is Sunday, 3 May 2009. The First Interview Date and Final Interview Date fields are empty. A navigation bar at the bottom of the top section includes tabs for Personal Details, Client Notes, Notes, Children, Emergency Contact, Urgent Medical Info, Evaluation, and Member of Group. The bottom section contains additional details: Cultural Background (Anglo), Status (Active), CS Officer (Organisation Manager), and Is Parent? (checked). The DOB is 12/04/1994, and the Age is 16. The Gender is Male. The To be included in Stats? checkbox is checked. The Archive Date is empty, and the Funding Type is Fund Type1. Red circles highlight the drop-down menus for Referrer, School, Year Level, Suburb, Cultural Background, Status, CS Officer, Gender, and Funding Type.

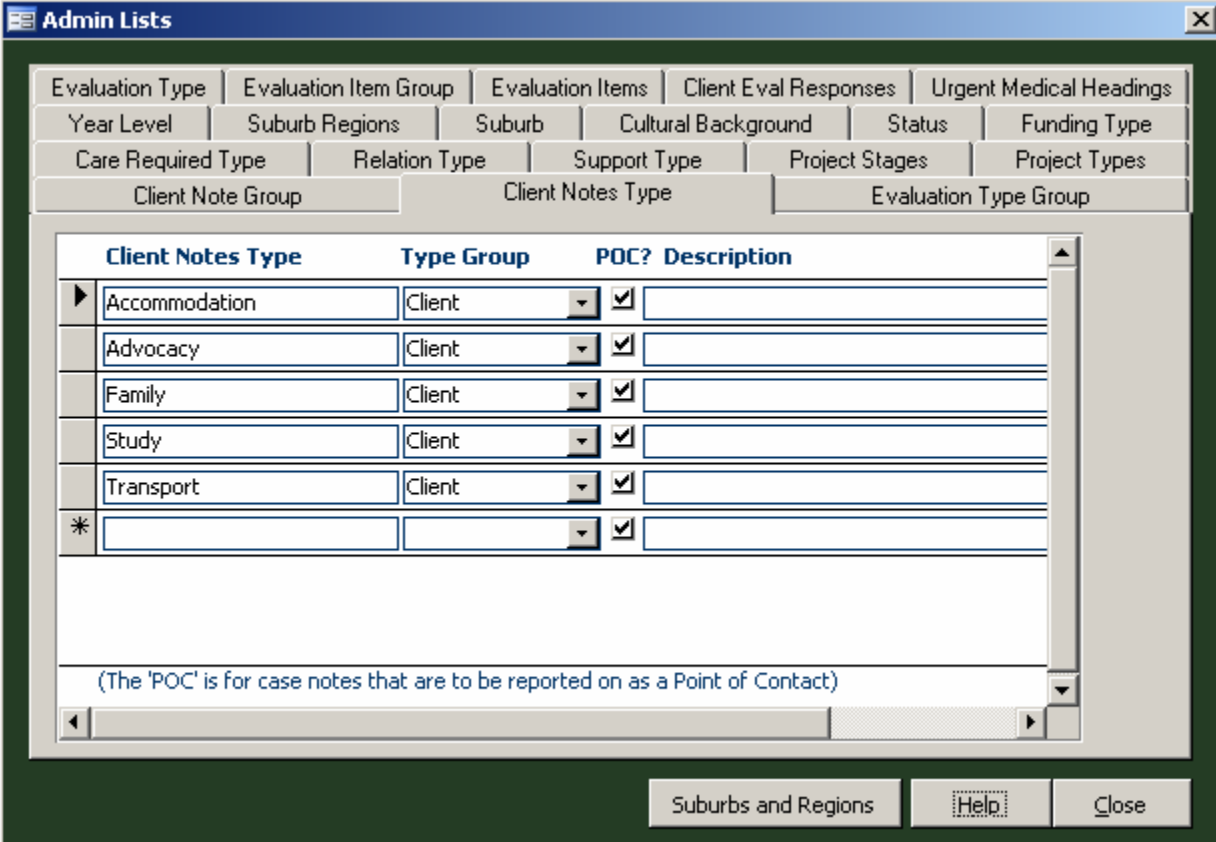
Setting Up: Admin Lists

- In looking to add and edit entries to these various drop-down lists, each component within *FCSM* has a selection of lists within a popup *Admin Lists* screen.
- *It is best* if entries for these various lists are decided on, agreed to and entered into the database *before using each component*. A set of worksheets have been provided in the User Manual to assist with this.

For instance, open the *Client Detail* screen and click on the **Lists** button

 at the bottom of the screen. Tabs have been included to allow you to add/edit entries for drop-down lists such as:

- Client Note Types and Groups
- Evaluation Types, Groups, Items and Responses
- Cultural Backgrounds and Year Levels
- Client Status and Support Type
- Suburbs and Suburb Regions.



The screenshot shows the 'Admin Lists' window with a tabbed interface. The 'Client Notes Type' tab is active, displaying a table with the following columns: Client Notes Type, Type Group, POC?, and Description. The table contains several rows of data, including 'Accommodation', 'Advocacy', 'Family', 'Study', and 'Transport', all with 'Client' in the Type Group column and checked boxes in the POC? column. A new row is marked with an asterisk (*). Below the table, a note states: '(The 'POC' is for case notes that are to be reported on as a Point of Contact)'. At the bottom of the window, there are buttons for 'Suburbs and Regions', 'Help', and 'Close'.

Client Notes Type	Type Group	POC?	Description
Accommodation	Client	<input checked="" type="checkbox"/>	
Advocacy	Client	<input checked="" type="checkbox"/>	
Family	Client	<input checked="" type="checkbox"/>	
Study	Client	<input checked="" type="checkbox"/>	
Transport	Client	<input checked="" type="checkbox"/>	
*		<input checked="" type="checkbox"/>	