



FuSioN User Guide

Create and Allocate Services

Overview	This User Guide details how to Create and Allocate Services in either an Assessment and Coordination case or an Intensive Case Management case.
Hints & Tips	The Service can be allocated from the Services tab of the case or in the Service screen itself.

Create and Allocate Services

Step	Action
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Allocate Service within Services Tab

Navigate to the **Services** tab.

1.

The screenshot shows the 'Case' form with the 'Services' tab highlighted in red. The 'Referral Information' section contains the following fields: *Type (dropdown), Name (text), *Referral Date (01/08/2018), *Time (8:11AM), Contact Method (dropdown), Primary Issue (dropdown), *Status (Open), Corridor (PERTH / MIDLAND), Closure Date (text), Reason for Case Closure (dropdown). Below this is a table for hours: Initial Screening (0.00), Assessment (0.00), Service Delivery (0.00), and Brief Intervention (0.00). The *Summary section includes an Assessment text area and two questions: 'Are there any children identified in this case?' (Yes/No) and 'Are there other agencies involved?' (Yes/No).

If there are no existing services, complete the allocation details.

2.

The screenshot shows the 'Case' form with the 'Services' tab selected. The 'Service Provision' table has one row: Service Type (blank), Status (Awaiting Allocation), External (checkbox), Start Date (blank), End Date (blank), and a Delete button. Below this is the 'Allocation Detail' section, highlighted in red, with the following fields: *Start Date (text), *Status (Awaiting Allocation), External Service: Agency ID (checkbox and text), Agency Name (text), End Date (text), Outcome (text), Service Duration (text), *Service Type (dropdown), Unmet Demand Reason (dropdown), Service Provider (dropdown), Program (dropdown), and Comments (text area). A 'Next' button is located below the 'Service Duration' field.

Create and Allocate Services

Step	Action
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3. If there are existing services, select the **Add Service** button and complete the Allocation details.

Case : (100014890) History Select One...

Save

Case Services Brief Interventions Case Management Review Notes (0) Related Activities

Service Provision

Service Type	Status	External	Start Date	End Date	Find	First	1-3 of 3	Last
Financial Counselling	Allocated	<input type="checkbox"/>	03/08/2018					Delete
Housing Support	Allocated	<input type="checkbox"/>	01/08/2018	01/08/2018				Delete
	Awaiting Allocation	<input type="checkbox"/>						Delete

Add Service

Allocation Detail

*Start Date

*Status Awaiting Allocation

External Service: Agency ID

Agency Name

End Date

Outcome

Service Duration

Next

*Service Type

Unmet Demand Reason

Service Provider

Program

Comments

Audit History

Save Top of Page

4. Select Next.

Case : (100014890) History Select One...

Save

Case Services Brief Interventions Case Management Review Notes (0) Related Activities

Service Provision

Service Type	Status	External	Start Date	End Date	Find	First	1-3 of 3	Last
Financial Counselling	Allocated	<input type="checkbox"/>	03/08/2018					Delete
Housing Support	Allocated	<input type="checkbox"/>	01/08/2018	01/08/2018				Delete
	Awaiting Allocation	<input type="checkbox"/>						Delete

Add Service

Allocation Detail

*Start Date

*Status Awaiting Allocation

External Service: Agency ID

Agency Name

End Date

Outcome

Service Duration

Next

*Service Type

Unmet Demand Reason

Service Provider

Program

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5.

The Allocate People-Service Provider screen displays.

Select the appropriate person/s and their appropriate issue/s for the service by selecting the checkbox.

Allocate People - Service: (INCO) Provider: (Perth Partner Agency 1)

Personalize | Find | First 1-4 of 4 Last

Person View	Person ID	Issue	Issue Detail	Surname	Forename	Select
1	469195	Family Support	Immediate Family	TEST	Person1	<input checked="" type="checkbox"/>
2	469195	Housing	Overcrowding	TEST	Person1	<input type="checkbox"/>
3	469196	Financial Assistance	Income	TEST	Person2	<input type="checkbox"/>
4	469196	Parent Adolescent Conflict	Breakdown in Communication	TEST	Person2	<input type="checkbox"/>

Click the **Create Service** button

6.

The screen returns to the **Services** tab and the Allocated Service now displays.

Case : (100014890) History Select One...

Case **Services** Brief Interventions Case Management Review Notes (0) Related Activities

Service Provision

Service Type	Status	External	Start Date	End Date	Delete
Financial Counselling	Allocated	<input type="checkbox"/>	03/08/2018		<input type="button" value="Delete"/>
Housing Support	Allocated	<input type="checkbox"/>	01/08/2018	01/08/2018	<input type="button" value="Delete"/>
Individual Counselling	Allocated	<input type="checkbox"/>	06/08/2018		<input type="button" value="Delete"/>

Allocation Detail

*Start Date: 06/08/2018 *Status: Allocated

External Service: Agency ID:

Agency Name: End Date:

Outcome:

Service Duration:

*Service Type: Individual Counselling

Unmet Demand Reason:

Service Provider: Perth Partner Agency 1

Program: Perth partner1 program 1

Comments:

Audit History

Create and Allocate Services

Step	Action
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7.

To record details of the allocated service, select the **Update Service** button.

Case : (100014890) History Select One...

Save

Case Services Brief Interventions Case Management Review Notes (0) Related Activities

Service Provision

Service Type	Status	External	Start Date	End Date	Delete
Housing Support	Allocated	<input type="checkbox"/>	01/08/2018	01/08/2018	Delete
Financial Counselling	Allocated	<input type="checkbox"/>	03/08/2018		Delete
Individual Counselling	Allocated	<input type="checkbox"/>	06/08/2018		Delete

Add Service

Allocation Detail

*Start Date: 06/08/2018 *Service Type: Individual Counselling

*Status: Allocated Unmet Demand Reason: [Dropdown]

External Service: Agency ID: [Text] Service Provider: Perth Partner Agency 1

Agency Name: [Text] Program: Perth partner1 program 1

End Date: [Text] Comments: [Text]

Outcome: [Text]


Service Duration: [Text]

Update Service

Audit History

8.

Complete the following:

- Today's date is automatically shown in the **Start Date** field. Use the calendar icon to update the Start Date for the Service as appropriate.
- Select the **Assigned To** person using the the search icon .

Service ID : (100014894) History Select One...

Save

Main Information Brief Interventions Notes (0) Related Activities

Details

Assessment: [Text Area]

Comments: [Text Area]

Transfer to "Parent Case"

Active Holding ?

Start Date: [Calendar Icon] End Date: [Calendar Icon]

*Start Date: 06/08/2018 **a.**

Service Type: Individual Counselling

*Assigned To: [Search Icon] **b.**

*Provider: Perth Partner Agency 1

Status: Open

Review Date: [Calendar Icon]

Outcome

Outcome: [Dropdown]

Decision Date: [Calendar Icon]

Intensity (hours): [Text]

Clients Receiving Service

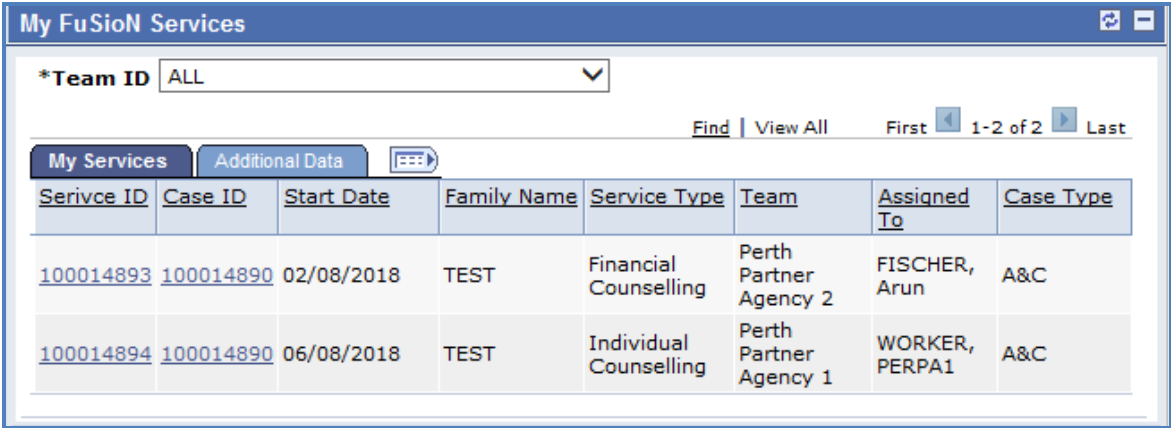
Person View	*Issue Id	Person ID	Name	Issue	Detail	Date Added	Detail	+	-
	100045912	469195	TEST, Person1	Family Support	Immediate Family	24/08/2018			
	100045915	469196	TEST, Person2	Parent Adolescent Conflict	Breakdown in Communication	24/08/2018			

Audit History

Save Top of Page

Click **Save**.

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Step	Action																								
9.	<p>Note - the Service will be displayed in the My FuSioN Services pagelet on FuSioN's Home Page.</p>  <p>The screenshot shows a web interface titled "My FuSioN Services". At the top, there is a dropdown menu for "*Team ID" set to "ALL". Below this are navigation links: "Find", "View All", "First", "1-2 of 2", and "Last". There are two tabs: "My Services" (selected) and "Additional Data". Below the tabs is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Service ID</th> <th>Case ID</th> <th>Start Date</th> <th>Family Name</th> <th>Service Type</th> <th>Team</th> <th>Assigned To</th> <th>Case Type</th> </tr> </thead> <tbody> <tr> <td>100014893</td> <td>100014890</td> <td>02/08/2018</td> <td>TEST</td> <td>Financial Counselling</td> <td>Perth Partner Agency 2</td> <td>FISCHER, Arun</td> <td>A&C</td> </tr> <tr> <td>100014894</td> <td>100014890</td> <td>06/08/2018</td> <td>TEST</td> <td>Individual Counselling</td> <td>Perth Partner Agency 1</td> <td>WORKER, PERPA1</td> <td>A&C</td> </tr> </tbody> </table>	Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type	100014893	100014890	02/08/2018	TEST	Financial Counselling	Perth Partner Agency 2	FISCHER, Arun	A&C	100014894	100014890	06/08/2018	TEST	Individual Counselling	Perth Partner Agency 1	WORKER, PERPA1	A&C
Service ID	Case ID	Start Date	Family Name	Service Type	Team	Assigned To	Case Type																		
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100014894	100014890	06/08/2018	TEST	Individual Counselling	Perth Partner Agency 1	WORKER, PERPA1	A&C																		